



FEDATA



Federation of Namibian
Tourism Associations

A Sustainable Tourism Country Report:

Namibia

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All errors or omissions remain the sole responsibility of the authors, who may be contacted c/o office@nacobta.com.na.

List of Abbreviations

BBEE	Broad-based Black Economic Empowerment
CBNRM	Community Based National Resources Management
CBT	Community Based Tourism
DEA	Directorate of Environmental Affairs
DPWM	Directorate of Parks and Wildlife Management
DRFN	Desert Research Foundation in Namibia
ECEAT	European Centre for Ecological and Agricultural Tourism
EU	European Union
FENATA	Federation of Namibian Tourism Associations
FIT	Frequent Individual Traveller
FTTSA	Fair Trade in Tourism South Africa
GRN	Government of Republic of Namibia
HDI	Historically Disadvantaged Individual
LIFE	Living in a Finite Environment
MET	Ministry of Environment and Tourism
MRLGH	Ministry of Regional and Local Government and Housing and Rural Development
NACOBTA	Namibia Community Based Tourism Assistance Trust
NACSO	Namibian Association of CBNRM Support Organisations
NGO	Non Governmental Organization
NTB	Namibia Tourism Board
RETOSA	Regional Tourism Organization for Southern Africa
SADC	Southern Africa Development Community
SPAN	Strengthening the Protected Area Network
ST	Sustainable Tourism
TESEF	Transformational Economy and Social Empowerment Framework
TFCS	Trans Frontier Conservation Areas
TSA	Tourism Satellite Account
UNDP	United National Development Programme
UN	United Nations
UNEP	United Nations Environment Programme
UNWTO	United Nations World Tourism Organization
WTTC	World Travel and Tourism Council

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Executive Summary

This Country Report highlights several key policies, projects and programs which have contributed to the success of Sustainable Tourism (ST) in Namibia and provides a brief overview of tourism supply and demand in the country.

The Government of the Republic of Namibia (GRN), Non-Governmental Organizations (NGOs) and many members of the private sector have recognised the need for tourism development that preserves Namibia's delicate eco-system, not just for use now, but for the future. Moreover, the GRN recognises the need for tourism and conservation to generate employment, reduce poverty and improve the quality of life for the Namibian People.

Namibia has a long history of promoting the sustainable use of all natural resources.

- The vision and mission statement of the Ministry of Environment and Tourism (MET) solidly embraces sustainable use of the country's natural resources as the foundation of all of its actions.
- Namibia has led the way and been recognised worldwide for its Community Based Natural Resource Management (CBNRM) programmes, which include various income generating projects in communal conservancies.
 - CBNRM is the centrepiece of the country's sustainable tourism activities.

Sustainable Tourism in Namibia is also championed by the private sector, which seeks to grow business enterprises to generate consistently increasing profits.

Introduction

This report reviews and analyses relevant policies, regulations, voluntary initiatives and programmes that have contributed to the success of Sustainable Tourism development in Namibia. This report also provides a brief overview of tourism supply and demand in the country. This report is a part of a larger project, the objective of which is to initiate a regional sustainable tourism initiative for southern Africa.

Terms and definitions

“Sustainable tourism” (ST) is the preferred term throughout this report to refer to an economic sub-sector that significantly contributes to sustainable development, which is defined as “development that meets the needs of the present without comprising the ability of future generations to meet their own needs” (Bruntland 1987: 43).

According to the definition above, the term sustainable tourism encompasses related concepts like “Fair Trade Tourism”, “Responsible Tourism”, “Eco Tourism”, “Community Based Tourism” and “Pro-Poor Tourism”. Sustainable tourism products can therefore include one or more of the following:

- Products that are based on ethical and responsible operations (Fair Trade and/or Responsible Tourism)
- Environmentally responsible products (Eco-tourism)
- Products that are managed and controlled by communities (Community-Based Tourism)
- Products that contribute to poverty alleviation (Pro-Poor Tourism)

While these terms do not always mean the same thing, there is much overlap in their content and objectives. As such, tourism products using all of these terms were researched and equally included in this study. Furthermore, throughout this report the term ‘sustainable tourism’ will be used in lieu of any of the above terms due to its broad application.

Purpose of the Research

In southern Africa there are several initiatives related to eco-labelling or sustainability certification in place. Currently, however, these initiatives are isolated from one another and tend to have limited capacity to reach international markets.

There is a growing interest in creating additional certification / labelling schemes; any new scheme would require orientation and collaborative guidance to ensure quality and to avoid the pitfalls experienced in other parts of the world where the proliferation of tourism labels is seen to be creating market confusion.

To tackle these obstacles Fair Trade in Tourism South Africa (FTTSA), the Namibia Community Based Tourism Assistance Trust (NACOBTA) and the European Centre for Ecological and Agricultural Tourism (ECEAT) have collaborated to investigate the potential for a regional sustainable tourism initiative in southern Africa. One of the main aims of any such future initiative would be to develop an integrated, regional approach to sustainable tourism certification.

In support of this goal, it was decided that an in depth study of Namibia should be conducted focusing on tourism. The objectives of this exercise are as follows:

- To provide an overview of tourism policy development in Namibia since 1990
- To develop a baseline understanding of tourism supply, demand and development in Namibia.

This report has five sections. The first section provides some statistical information on Namibia. The second section explores tourism policy development in Namibia since independence and covers voluntary initiatives and specific private sector projects linked to ST in the Namibian tourism industry. The third section examines Community Based Natural Resource Management (CBNRM) in Namibia, which is the centrepiece of the country's sustainable tourism activities. The fourth section looks briefly at the demand for tourism and ST in Namibia. The fifth section surveys the supply of ST products. By way of conclusion, the report provides some recommendations for ST development in the wider Southern Africa Development Community (SADC).

1. Namibia in Perspective

To place Namibia and the potentials of its tourism industry in perspective some background information is needed.

- Independence
 - March 21, 1990
 - Independence came after more than a century of brutal colonialism and decades of destructive and repressive apartheid policies.
- Population
 - 2.1 million
 - The distribution of wealth and income in Namibia is very unequal.
 - The UN Gini coefficient for Namibia is 74.3 (HDR 2007)¹.
- Land
 - Total land area: 823,680 square kilometres
 - Namibia is one of the largest countries in Africa.
 - 60% of Namibia is desert.
 - Bordered by Angola and Zambia to the north, Botswana to the east, South Africa to the South, and the Atlantic Ocean to the west.
 - Namibia boasts over 1,500 kilometres of coast line.
 - Namibia has some of the highest sand dunes and the second largest natural canyon in the world, the Fish River Canyon.
 - Namibia lies at the heart of the Namib-Karoo-Kaokeveld Deserts Eco-region. The Namibian part of this eco-region includes the Sperrgebiet and Namib Escarpment, which are both considered globally significant biodiversity areas.
- Biodiversity²
 -
 - Approximately 75 percent of the mammal species of southern Africa exist in Namibia, with 14 endemic species.

¹ UNDP (2007)

² Republic of Namibia, Ministry of Environment and Tourism (2006), *Project Document: Strengthening the Protected Area Network (SPAN) Project, project*

- Namibia is home to some 4,350 species and subspecies of higher plants, of which 687 species (17 percent) are endemic.
- 256 endemic species of reptiles
- Many various insect species
- 217 species of mammals including the "Big Five"³
- The country's internationally significant biodiversity hotspots include the Namib, the planet's oldest desert...the Sperrgebiet and the Namib Escarpment⁴.

2. Namibia and Sustainable Development

Namibia has a long history of promoting the sustainable use of all natural resources.

- The vision and mission statement of the Ministry of Environment and Tourism⁵ (MET) solidly embraces the sustainable use of Namibia's natural resources. The MET's official mission statement is:
 - To maintain and rehabilitate essential ecological processes and life-support systems, to conserve biological diversity and to ensure that utilization of natural renewable resources is sustainable for the benefit of all Namibians, both present and future, as well as for the international community.
- Community Based Natural Resource Management (CBNRM) is the centrepiece of the country's sustainable tourism activities.
 - Namibia has led the way and been recognized worldwide for its CBNRM programmes, which include various income generating projects in communal conservancies.
- ST in Namibia is also championed by the private sector, which seeks to grow business enterprises to generate consistently increasing profits.

³ The "Big Five" refers to Buffalos, Lions, Leopards, Elephants and Rhino.

⁴ Republic of Namibia, Ministry of Environment and Tourism (2006), *Project Document: Strengthening the Protected Area Network (SPAN)*

⁵ The Ministry of Environment and Tourism was founded at Independence in 1990 (it was initially called the Ministry of Wildlife and Conservation)

- Namibia has signed the following United Nations (UN) Conventions, qualifying it for Global Environment Facility (GEF) Funding:
 - UN Convention on Biological Diversity
 - UN Framework Convention on Climate Change
 - UN Convention on Combating Desertification
 - Stockholm Convention on Persistent Organic Pollutants

Namibia has many significant policies, regulations and voluntary initiatives that support Sustainable Tourism development in the country. The following discussion summarises tourism policy development in Namibia and different voluntary initiatives, respectively, followed by a discussion about the regulatory environment for sustainable tourism.

2.1 Tourism Policy Development in Namibia

The commitment by the GRN to the sustainable use of natural resources and to improving the quality of life of people living in protected areas / conservancies, is evidenced by a number of government initiatives, policies and plans⁶.

There are a number of new laws that are pending formal approval or are in the early stages of development, which have not been included in the analysis below.

The most significant policies and regulations that influence ST in Namibia are discussed below⁷.

⁶ For a list of related policies and legislative efforts see Appendix 2 and for a list of new tourism-related development and planned development see Appendix 3.

⁷ For a complete timeline of policies, regulations and the entrance of key stakeholders into the tourism sector since Independence, see appendix 1.

Government Policies and Regulations since 1990

The Constitution (1990)

- The GRN committed itself to protecting biodiversity and conserving the natural resources of the country.

Article 95 (l) of the Constitution: maintenance of ecosystems, essential ecological processes and biological diversity of Namibia and utilization of living natural resources on a sustainable basis for the benefit of all Namibians both present and in the future.

The National Tourism Policy (1994 onwards)

- This policy is needed to give the direction and focus for tourism development in Namibia. The latest draft version has been circulated to stakeholders in September, 2007 and this policy is still under development.

The 1996 amendment to the Nature Conservation Ordinance of 1975

- This policy has led to the increase in wildlife numbers and the registration of 50 conservancies.
- This policy established communal conservancies with rights and obligations regarding sustainable use of the resources of the land.
- Efforts are underway to strengthen this amendment by clarifying management objectives, in particular the framework for management of tourism and hunting concessions (see The Concessions Policy).

Namibia Tourism Board Act (Act no. 21 of 2000)

- This Act led to the establishment of the national Namibia Tourism Board (NTB) in 2002, which is the regulatory body of the tourism industry and which is tasked with:
 - Marketing Namibia as an international tourist destination.
 - Establishing minimum standards.
 - Assessing and registering tourism establishments.

The Transformation Charter (2004)

- This Charter broadens the base of who benefits from tourism. The Charter has seven components: skills development; apprenticeship, internship and sponsorship; strategic representation and employment equity; ownership and joint venture partnerships; preferential procurement; enterprise development; and social responsibility programmes⁸.
- The Prime Minister's office is currently drafting a national legislative framework for Transformation of the broader economy. Tourism will be included in this framework.

Namib-Naukluft Park, Management and Development Plan (2004)

- Announced in March, 2004.
- MET began park management plans for its major national parks including Etosha, Skeleton Coast and other sites. These plans are available at MET and are in various states of drafting or editing.
- Park management and development plans set the climate for what income generating possibilities for communities living in or near national parks to benefit from the Park.

Tourism Investor Roadmap (2006)

- This report made several key recommendations to Government around organising the country into investment zones; simplifying the registration of new tourism companies; debunking the myth of economic leakage⁹; and identifying certain regulations and Laws that must be spearheaded by the Ministry of Trade and Industry to stimulate increased investment in the tourism sector.

⁸ Commark 2005

⁹ the misperception of tourism operators receiving all payments for services in foreign accounts and not repatriating fees paid for services in Namibia

Tourism Satellite Account Report (2006)

- This report finally quantified the value of tourism to the Namibian economy. GRN has committed to updating the report every two-three years. The first update is already underway, spearheaded by the NTB.

Transformational Economy and Social Empowerment Framework (2007)

- This program is set to replace the national debate around Black Economic Empowerment (BEE); Namibia will likely introduce legislation to guide the empowerment of black Namibians, similar to what has been introduced in South Africa.

The Concessions Policy on Tourism and Wildlife Concessions on State Land (2007)

- This policy is also known as Vision 2030
- It is an overarching document which outlines a number of milestones that have to be achieved by the year 2030 to make Namibia a prosperous and industrialized nation. The policy covers targets for each sector of the economy and is a yardstick against which the various industry players assess their performance.
- This policy will decide the criteria and procedures for allocating Government concessions in state protected areas and national parks.
- This policy mandates strict considerations for Black Economic Empowerment and the empowerment of local communities.
- This policy is a key driver of ST in Namibia. In the covering letter of the Policy document, Minister of Environment and Tourism, Honourable Rev. Willem Konjore states:

"...Amongst the objectives of our Government's Vision 2030 [the Concessions Policy] is to ensure the development of Namibia's "natural capital" and its sustainable utilisation for the benefit of the country's social, economic and ecological wellbeing and...to maintain stable, productive and diverse ecosystems managed for long term sustainability".

Environmental Management Bill (November 2007)

- This bill provides for thorough environmental assessment studies and consultations with communities before infrastructure development projects are undertaken.
- It will also create a Development Advisory Council, and provide for the appointment of an Environmental Commissioner and environmental officers.
- MET has announced plans to draft a policy on Human-Wildlife Conflict as these issues are not covered in the new Environmental Management Bill.
- This measure was passed by Parliament in November 2007 and is currently under review by the National Council.

Draft policies pending relevant to Protected Areas¹⁰

Policy on Prospecting and Mining in Protected Areas

- sets out application procedures for mining and prospecting activities

Policy on Measures to Restrict Off-takes from Wild Populations to Sustainable Levels

- Aims to promote sustainable management and utilisation of wildlife resources in both public and private land.

Policy on the Management and Disposal of Seized Specimens of Wildlife

Policy on Registration and Management of Conservancies

- Details MET's role in the registration and management of communal conservancies, including its role in assisting in management planning, species relocation and hunting quotas¹¹

¹⁰ For other related proposed policies and legislative efforts see Appendix 2

¹¹ Republic of Namibia, Ministry of Environment and Tourism (2006)

2.2 Industry Voluntary Initiatives

There are also a variety of voluntary initiatives that have been undertaken in Namibia that are independent of the government. These voluntary initiatives further demonstrate commitments to sustainability by industry and other stakeholders. Some of the most significant examples are:

NACOBTA: founded in 1995

- A local non-profit organisation accesses donor funding and channels this through to mostly rural communities.
- Funds are used as an investment in tourist facilities, including camp sites, tourist information centers, bush camps, tour operators and guides, traditional homesteads and craft outlets. These facilities are in turn owned and managed by representative community—based organisations.
- NACOBTA has facilitated the establishment of at least 25 campsites, each with the capacity to host 30 visitors.
- NACOBTA and other NGOs provide training, marketing and technical assistance to community-based tourism enterprises to help improve their viability.
- In 2006 NACOBTA facilitated N\$540 000 (approx US\$69 000) worth of reservations
- NACOBTA places adverts and articles in key publications including Travel News Namibia, in an attempt to increase visitor numbers.
- NACOBTA represents Community Based Tourism Enterprises (CBTEs) at international trade fairs (when funds allow).



The NACOBTA Membership Organisation

NACOBTA stands for “Namibia Community Based Tourism Assistance Trust”. It is a non-profit membership organisation that was started in 1995. NACOBTA supports communities in rural Namibia in their efforts to develop and operate tourism enterprises that are both profitable and sustainable. NACOBTA provides a number of important support services which include various kinds of training, business advice, marketing, funding and advocacy for community-based tourism enterprises. Using the slogan “Our People - Our Cultures - Our Pride” NACOBTA strives to alleviate poverty and to improve the living standards of the people of Namibia through community-based tourism enterprises (CBTE). For more information see www.nacobta.com.na.

Eco-Awards Namibia

- A locally developed certification scheme for Sustainable Tourism businesses.
- Evaluates conservation, water, waste and energy management, sustainable construction, staff development and social responsibility.
- Qualifying establishments are rated for their sustainability and are allotted between 1 and 5 “flowers”.
- So far, 8 tourism establishments have qualified for an Eco Award.
- This programme is under-funded and unable to realise its potential.
- Increased GRN funding for this programme, incorporated within the CBNRM program of the MET can present an opportunity to mandate certain environmental criteria espoused by the eco-awards program, for all tourism enterprises.



The ECO-Awards Namibia Certification Scheme

ECO-Awards Namibia was established in 2004 and certifies accommodation establishments which are planned and managed according to eco-friendly principles. Focusing particularly on the environment, assessment criteria include: conservation, water management, waste management & sewerage disposal, energy management, suitable & appropriate construction & landscaping, guiding, staff development and social responsibility & human welfare. Establishments are awarded up to “5 flowers” (based on Namibia’s Desert Flower). This scheme is available in Namibia and currently 8 products carry the flower logo. For more information see www.ecoawards-namibia.org.

2.3 Discussion

As illustrated by this overview of governmental and voluntary initiatives in the Namibian Sustainable Tourism sector:

- The tourism industry is vibrant and new products are regularly launched and others are being planned by the government and the private sector.
- It is clear that the Namibian government, regional and local authorities, existing tour operators and accommodation providers, and communities with tourism products are all responding.
 - Relevant policies are being reviewed and updated
 - Old facilities are being renovated.
 - Existing operations are being expanded.
 - Investment in marketing and training is being increased.

While Sustainable Tourism is alive, well and growing in Namibia, it is not without obstacles. Some of the most significant obstacles to sustainable tourism in Namibia include:

- Many decision-makers, the media, captains of industry in other economic sectors, and the general public do not fully understand the value-chain involved in bringing tourists to Namibia, or its potential for income generation.
- Many Historically Disadvantaged Individuals (HDI) who seek entry into the sector complain about the lack of opportunities.
- Tourism in Namibia is often perceived as:
 - Something that is for white foreigners
 - Only benefits other whites
 - Ignores the cultural and traditional tourism potentials of Namibia
- The tourism industry in Namibia is largely owned and controlled by white Namibians and Permanent Residents.
- There is a small number of Black Namibians in the tourism sector.
- It is a challenge to integrate national tourism development policies that various tourism stakeholder Ministries do not fully recognize or appreciate.

- They occasionally pass regulations or laws that can impede (sustainable) tourism development.

However, positive changes are occurring:

- The number of Black Namibians entering the sector as entrepreneurs at various levels is increasing.
- Black empowerment equity arrangements are on the rise.
 - Though the overall number is still low and the progress in this area is slow.
- Training and skills transfer has always been a feature of the industry. The status quo in the mainstream of the tourism industry is embracing the reality that change is inevitable.
- There is a Transformation Charter committing the industry to broadening the base of who benefits from Tourism and the Prime Minister's office is currently drafting a national legislative framework for Transformation of the economy.

3. Community Based Natural Resource Management (CBNRM) in Namibia

A discussion of sustainable tourism in Namibia would be incomplete without a detailed discussion of Community Based Natural Resource Management (CBNRM). CBNRM initiatives in Namibia have restored the link between conservation and rural development by enabling communities to receive a direct income (in most cases) from the sustainable use of wildlife and from tourism activities¹². In fact, Namibia has led the way and been recognized worldwide for its CBNRM programs.

3.1 What is CBNRM?

CBNRM is an increasingly popular approach to resource management. It is commonly embraced in post-colonial countries where new governments are

¹² CBNRM Conference, First National – *Namibia CBNRM Updates and Launch of New National CBNRM Program Projects: Introductory Speech by Dr. Malan Lindeque* – Conference Report Document (2004), Report produced by MET, WWF-LIFE, ICEMA and IRDNC, Project Launch held October 25, 2004 and Conference held on October 26, 2004, p.2

seeking an alternative approach that tackles resource management from the “bottom up” as opposed to “top down” (as commonly employed by colonial governments). The CBNRM programme in Namibia has received more than 12 years of continuous support from the Living in a Finite Environment (LIFE) Project funded by USAID¹³ and is currently in its third phase. Funding is currently planned to continue through 2009. The LIFE project has focused on three main components: rural development, democracy and governance and sustainable natural resource management¹⁴.

In Namibia, CBNRM’s foci are:

- Mobilizing communities so that have the opportunity to take management decisions themselves.
- Increasing opportunities for residents to derive income and other benefits from the sustainable use of natural resources.
- Providing rights and tenure over natural resources to promote long-term planning for the ways in which natural resources can continue to benefit people.¹⁵

3.2 Communal Conservancies

At the end of 2007 The Ministry of Environment and Tourism had:

- Registered 50 communal conservancies¹⁶.
- At least 25 more are emerging.
- The 50 registered conservancies cover more than 118,704 square kilometres (14.4%) of the country.
- Over 220,000 people live within these conservancies.
- For a list of conservancies see Appendix 4.
- For a map showing the location of conservancies, see below.

¹³ USAID 2006

¹⁴ *ibid*

¹⁵ Namibia Association of CBNRM Support Organizations (NACSO) (2006), *Namibia's Communal Conservancies: a review of progress and challenges in 2005*. NACSO, Windhoek

Within conservancies, the main activities are hunting (the main source of revenue) and tourism related accommodation (the second largest source of revenue). Other activities with potential to generate income for local residents include arts and crafts; natural products (e.g. marula oil, devil's claw or hoodia); and commercial products deriving from community forests.

3.3 What are the Benefits of CBNRM?

There are a range of benefits associated with CBNRM, as discussed below:

- CBNRM generates income
 - In 2006, revenue totalled N\$26 178 404 (3,363,820 USD) - reflecting an increase of over N\$3,300,000 from 2005 alone¹⁷.
 - In 1998 cash income and non-cash income to CBNRM activities was N\$1 151 776.
 - WWF-LIFE reports that in 2006, 794 full time jobs were created on communal conservancies in Namibia, up from 498 in 2000. In addition, 5,101 part-time jobs were created. Employment through conservancies represented 30,6% of total tourism employment in Namibia in 2006.
 - Prior to the CBNRM programme there were few jobs and there were limited opportunities for training and advancement.
 - NACOBTA estimates that at least 5 people benefit [in varying degrees] from each job created.
 - Such employment is extremely beneficial to poor communities provided that wages and benefits are aligned to labour laws.
- CBNRM revitalises animal stocks
 - Many conservancies had depressed wild animal stocks before the CBNRM program.

¹⁷ Ibid, Table 5, pgs 26-27

- CBNRM has led to an increase in game on registered conservancies. More game means more opportunity for tourism and/or professional hunting, the two largest income earning activities for conservancies.
- People living in these areas now see a high value in having an abundance of wildlife in their areas. The animals are collectively owned by all members of the conservancy and each member has a stake in the maintenance of wildlife resources. This creates a firm and concrete incentive to preserve and sustainably manage the resource base.
- Communal conservancies add substantially to the network of conservation in Namibia.
 - Approximately 37% of the total land surface in Namibia is currently under conservation management¹⁸.
 - 14.4% of the country is covered by communal conservancies.
 - 16.5% of Namibia's surface area which is within National Parks and Game Reserves (this includes the soon-to-be-proclaimed Sperrgebiet National Park).
 - 6% of the country is located in freehold conservancies (privately owned and managed areas). .
- CBNRM mainstreams knowledge of HIV / Aids
 - At community gatherings, efforts are made to educate the communities about the pandemic.
 - The CBNRM programme also has an active HIV/Aids programme which is a stand alone effort. It has been proposed that this topic should be integrated into the national tourism policy and it is hoped that it will be included in the next version. There is also a private sector initiative which looks at HIV/Aids in the workplace and a number of businesses subscribe to this.

¹⁸ Namibia Association of CBNRM Support Organizations (NACSO) (2006), *Namibia's Communal Conservancies: a review of progress in 2005*. NACSO, Windhoek, p. 13

Positive Feedback on CBNRM

- According to Namibia Association of CBNRM Support Organizations (NACSO):
 CBNRM has proved to be an important mechanism for the Namibian Government to meet its goals of sustainable development... it is based on the understanding that if resources have sufficient value to local people and allow for exclusive rights of use, benefit and management, then [CBNRM] can create appropriate incentives for people to use resources sustainably."¹
- According to the WTTC,
 For a number of years now, Namibia has been a leader, both in Africa and the world, in its approach to conservation and community involvement in resource management. According to the United Nations, it is Africa's top performer in Global Environment Facility (GEF) programs and, in 2005, Namibia ranked 32nd out of 146 countries on the Environmental Sustainability Index (ESI) – the highest ranked desert country in the world.¹
- From the WWF,
 Namibia has arguably the best CBNRM program in the world --based on legal rights which empower people at the community level and can improve (albeit at varying levels) their income and opportunities for training, information and personal development. This is positive for both the environment and poverty alleviation. CBNRM has a demonstrated high potential to establish self-sustaining and enduring natural resource management institutions. With the rise in interest by the global traveller in products that are good for the environment and leave a positive social footprint, CBNRM is potentially a powerful marketing tool...¹

3.4 What are the Challenges to CBNRM?

- Regarding the Government
 - The government of Namibia maintains ownership of communal lands (assets), which can create barriers to communities seeking financial support for tourism development in their areas.
 - Lack of land ownership and cumbersome regulations to obtain long-term land tenure are said to hinder the ability of communities to be equal partners in tourism development as they cannot use the land as surety or collateral for a financial investment in an enterprise.

The financial burden and entrepreneurial risk of tourism enterprises in communal conservancies and in rural areas more generally, falls largely (if not entirely) on the private sector investor.

- Regarding Investment¹⁹
 - Attracting investment is a major challenge due to various constraints, including barriers in accessing finance; concerns about land tenure; communication challenges; lack of infrastructure; and inadequate / uneven skills development.
 - Investors are not showing interest in most communal conservancies as evidenced in low response rates to investment tenders.
 - Donors do not avail a lot of money for marketing and many CBTEs remain unknown to visitors. These are some of the factors that undermine the principles of ST.

- Within Communities
 - The primary concerns of many communities are to pay school and medical fees for their children and to be able to provide for their families and improve their quality of life. Gaining an understanding of tourism risks and time delays before profitability, repaying loans, marketing their business and servicing clients are secondary concerns.
 - Often, communities seeking the benefit from leisure tourist arrivals do not want to subsidize the tour operator for bringing in the clients.
 - For example, tour operators bringing clients to Namibia have: collectively spent millions of Namibia dollars, assume the risk for rural tourism development, do marketing to bring clients to the facilities, training staff for service, pay fees involved in tourism development (EIAs, registrations, land lease fees, etc.), pay high interest on bank loans and

¹⁹ For more information see “The Barrier Study” by Peter-John Massyn.

overdrafts, pay insurance, pay levies and taxes, provide products demanded by their clients, absorb other costs associated with tourism development.

- Conservancy committees rarely have access to internal business experience or advice²⁰.
- Literacy levels are often low²¹
- There is an absence of entrepreneurial skills²²
- Rural communities are at risk of being exploited by some operators, due to their limited capacity to understand tourism and their need of an instant income.
- Benefits associated with CBNRM are not equally distributed within communities, which can lead to conflict.

3.5 Possible Solutions

Possible solutions to these challenges include:

- Constant dialogue between the community (and their traditional and elected leaders) and the private sector investor.
- A range of exposure, training, and skill development could develop conservancy business expertise and mentality.
- Tolerance, cultural sensitivity and patience by the private sector partners are also necessary so that ownership of the facility can eventually revert to that community.
- Communities must first understand fully the programme and its benefits and obligations. Then, among other things, they must agree amongst themselves on management, control and income distribution issues.

²⁰ Living in a Finite Environment Plus (LIFE Plus) (2007), Integrated Community Based Natural Resource Management (CBNRM) for Economic Impact, Local Governance and Environmental Sustainability: Semi-Annual Report For: April 1 – September 30, 2007, USAID/Namibia Strategic Objective 7, Project No. 690-A-00-04-00261-00, Windhoek

²¹ *ibid*

²² *ibid*

- Constant information, discussion, and re-discussion are needed to just begin the programme. Once begun, follow-up, report-backs, feed-back visits and pro-active contact is vital lest the program lose momentum, community participation, and key focus on its objectives.

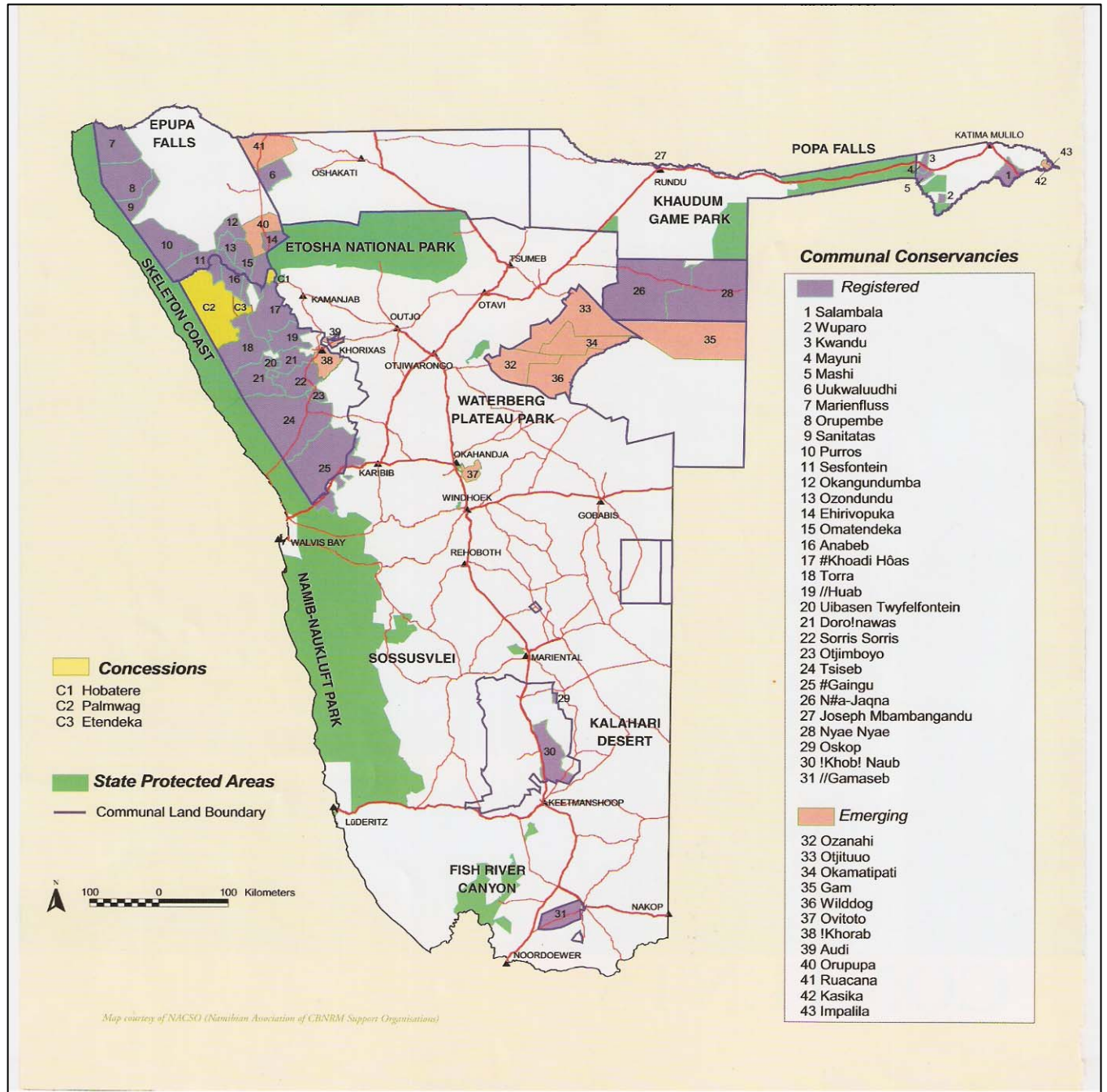
A Success Story: Grootberg Lodge in the #Khoadi-// Hoas Conservancy

In Namibia, there is a pilot enterprise, called the Grootberg Lodge in the #Khoadi-// Hoas Conservancy where a full 3-4 star lodge has been built and outfitted completely by the EU and is the property of the community. In this instance, the benefits of staying at the lodge directly flow to the community and creature comforts for this market segment of upper-end tourists, are still available. The market seems to indicate that lodges in this model may fit the demand from this group of travellers.

The committed and talented management team, as per their contract, have invested significant funds into the lodge for training and to improve its activity offerings and increase the average bed-night stay. Direct financial returns to the community --above the salaries to the 24 people working at the lodge-- are not yet in circulation as the lodge has yet to earn enough to cover its full operational costs and to refund investments.

Nevertheless, wealth has been transferred directly to a communal conservancy in this model. Skills in running the operation are being transferred, but not without communications and other difficulties in staff turn-over. Significantly, the donor community has reversed itself and no longer supports financing any additional lodges in this model; they favour the standard joint venture models where costs of building the facility are borne by the private sector investor. Donor funds would only be allocated for training and technical support to the community or to NGOs supporting the communities in contract negotiations with private sector partners, with game counts, other ways. Nevertheless, the future for the Grootberg Lodge is bright.

Map 1: Namibia's State Protected Areas and Communal Conservancies²³



²³ Courtesy of NACSO, 2006

4. Tourism Demand in Namibia

This section of the report looks at the demand for tourism in Namibia and the following section will address the supply of tourism products currently available.

Tourism demand is increasing around the World and in Africa. Namibia is no exception to this trend.

Worldwide:

- In terms of arrivals: From January through April 2007, international tourist arrivals worldwide rose by over 6% to 252 million, representing an additional 15 million arrivals compared to the same four month period in 2006.²⁴
- In terms of receipts, a UN study states that international tourism receipts reached US\$ 735 billion in 2006²⁵.
- International tourism to developing countries is significant and increasing: more than 40% of global tourism arrivals take place in the developing world.²⁶

Within Sub-Saharan Africa

- 25.8 million International tourist arrivals to the region in 2006 (UNWTO 2007).
 - There has been an annual growth rate in tourism arrivals of 6.5 % per year since 2000.
- Tourism receipts totalled 15.8 billion USD in 2006 (UNWTO 2007).

And in Namibia

- Arrivals:
 - In 2006 the MET reported that 833,345 tourists visited Namibia. This figure is a 7.1% increase over 2005 arrivals, of 777,890. Arrivals in 1993 totalled approximately 254,000.

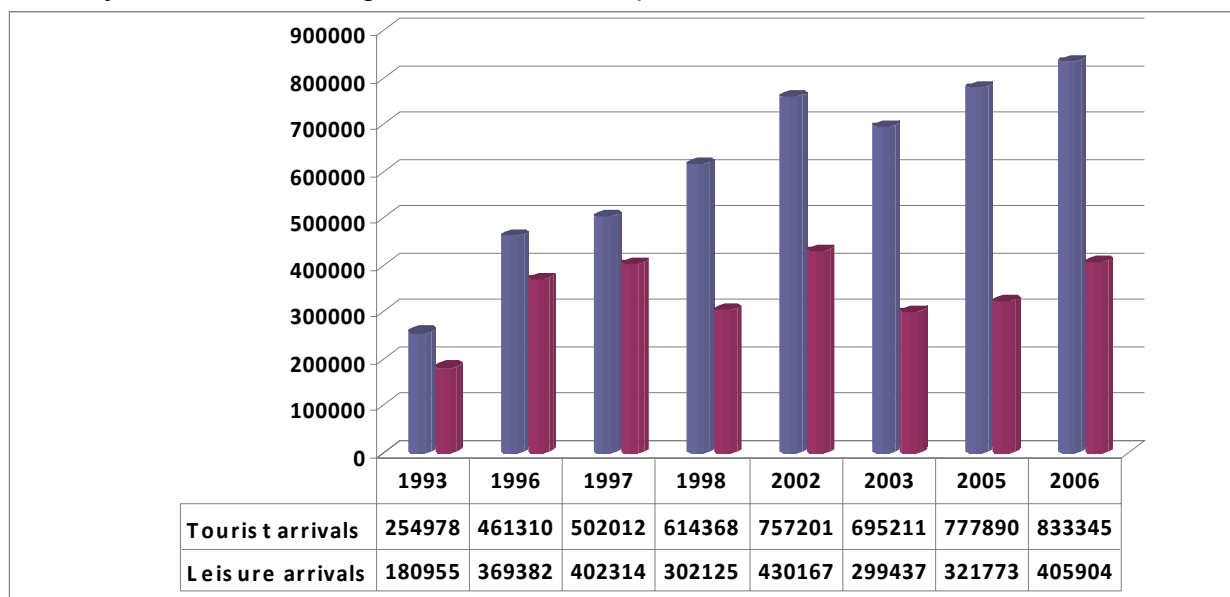
²⁴ United Nations Tourism Organization's World Tourism Barometer (*June 2007*)

²⁵ UNWTO (2007)

²⁶ UNWTO (2007)

- Tourism receipts in Namibia totalled 384 million USD in 2006 (UNWTO 2007).
- According to the WTTC “encompassing all components of Travel & Tourism consumption, investment, government spending and exports [were expected] to grow 8.2 per cent (real terms) and total N\$9.1 billion (US\$1.5 billion) in 2006. The ten-year annualized growth (2007-2016) forecast is 6.9 per cent per annum. This makes Namibia the 13th fastest growing country in the world in terms of Travel & Tourism Total Demand²⁷.

Table 1: Arrivals to Namibia, Selected years 1993 – 2006 (MET Statistics, graph courtesy of NTB Marketing and Research Department, Marta Awala)



4.1 Where do International Tourists Come from?

FENATA, with support from the NTB, has prepared a desktop analysis of various market segments as can be seen from the table below.

- German-speaking Europe still accounts for more than 45% of inbound overseas tourists in Namibia.

²⁷ WTTC 2006

- The UK provides over 17% of the overseas arrivals to Namibia representing a significant part of the primary source market.
- South Africa and Angola provide 2/3rds of the arrivals to Namibia.
 - Though a large portion of these arrivals are not leisure tourists.
- While the largest number of arrivals to Namibia is from Angola this number does not reflect actual spending because:
 - 95% of these arrivals pass through the northern border posts and are one-day visitors, visiting friends and relatives, or shopping for basic commodities that are unavailable in southern Angola.
 - Air arrivals from Angola are Fully Independent Travellers (FITs), primarily business travellers and/or their families, as well as high-end, fly-and-shop tourists that have little interest in sustainable tourism, community-based tourism or eco-tourism.

Table 2: Nationality of International Tourists to Namibia (MET 2006)

Angola	278,058
South Africa	239,886
Zambia	45,203
Zimbabwe	30,623
Botswana	24,730
Other Africa	10,098
Germany	68,214
UK	24,736
Netherlands	12,196
France	12,000
Italy	9,406
Switzerland	8,921
Scandinavia	7,305
Austria	5,278
Spain	4,467
Portugal	3,880
Belgium	3,753
Other Europe	6,816
USA	16,325
Australia	4,645
Other Countries	16,814
TOTAL	833,345

4.2 What Kinds of International Tourists Come to Namibia?

- Tourists arriving in Namibia are largely pre-packaged, pre-arranged travellers.
- There are a very low number of 'spontaneous' travellers to Namibia who arrive with no accommodation plans, no transportation arrangements, and no bookings.
- There are a large number of self-drive tourists who take advantage of Namibia's excellent roads, infrastructure and safe and secure reputation. They usually map-out their travels and make all reservations before they begin their travel.
- MET statistics show that Namibia is drawing an increasing number of
 - Double-income, no-kids (DINKS) leisure tourism travellers.
 - Single-income, no-kids (SINKS) leisure tourism travellers.
 - An increasing number of retired travellers.
- Many tourists are also concerned with leaving minimal environmental footprints.

4.3 What kind of tourism products do International Tourists Want?

- Trends indicate that higher-spending overseas travellers show the highest propensity for sustainable tourism products.
- These international tourists would stay at a community campsite if the conditions were up to their standards: clean ablutions, fresh water, and hygienic conditions.

4.4 Where do they go?

- Protected Areas
 - In 2003, 214,000 - 382,000 tourists are estimated to have visited protected areas during their tours to Namibia²⁸. 45% were domestic tourists, with 37% from overseas (mainly Europe) and the remainder from within Southern Africa.²⁹
- National Parks

²⁸ Republic of Namibia, Ministry of Environment and Tourism (2006),

²⁹ Ibid.

- According to the TSA, 7 of the 11 most visited sites in Namibia are national parks, protected areas, or natural landmarks.³⁰
- Community Based Areas
 - The TSA also lists that the number of tourists visiting community-based areas/lodges grew from 30,000 in 1999 to 70,000 in 2002 and to approx. 90,000 in 2004.³¹

4.5 Domestic Tourism

- Domestic tourism is a significant market base that has long been ignored and understudied.
 - The NTB statistics show that approximately 33% of bed nights sold in Namibia in 2005 were for domestic tourists.
 - The MET estimates that 45% of those visiting Protected Areas in 2003 were domestic tourists³².
- Efforts of evaluating the market needs for this group are only now beginning so there is currently little information available.
- Off-peak season tourism sales to the domestic market could potentially play a central role in providing income to sustainable tourism products in Namibia.
- The NTB, stakeholders in other Ministries and the private sector are currently in the process of launching a survey of this market.

5. Tourism Supply in Namibia

The existing Namibian tourism products have been developed primarily by Namibian and Permanent Resident entrepreneurs and Namibian companies; and secondarily by South African companies and entrepreneurs. As mentioned earlier, the tourism economy in Namibia generated N\$5.2 Billion by the end of 2006, or 14% of GDP, making it the second largest sector in the country, behind the mining and energy sector.

³⁰ World Travel and Tourism Council (WTTC) (2006), page 20

³¹ Ibid, page 21

³² See The MET's Strengthening the Protected Area Network (SPAN) project

5.1 How big is the tourism supply in Namibia?

The Namibian Tourism Board (NTB) assesses and registers tourism businesses. At present they have 2,293 registered tourism establishments³³. 1,171 are accommodation businesses and 1,122 are other regulated businesses³⁴.

5.2 How big is the Sustainable Tourism industry in Namibia?

- In terms of available establishments
 - NACOBTA members totaled 37 at the end of 2007.
 - Though not all community-based tourism enterprises are sustainable.
 - Eco-Awards Namibia has certified 8 tourism accommodations to date.
 - There are a number of private sector lodges that have committed to sustainable development (for full details see the Voluntary Initiatives section above) such as:
 - The Leading Lodges of Africa
 - Wilderness Safaris
 - Wolwedans
 - The United Africa Group (UAG)
 - Namib Sun Hotels
 - Islands in Africa
 - The Gondwana Desert Collection
 - Visions of Africa Safari Company
 - Namibia Country Lodges (NCL)
 - The Namibia Wildlife Resorts (NWR)

³³ This figure does not include B&Bs with one bedroom and there is an ongoing effort to address the issue of existing accommodation establishments that have not yet complied with the law.

³⁴ For a complete breakdown of the NTB figures see appendix 5.

- In terms of Tour Operators
 - The Namibian Tourism Board claims that there are 43 outbound tour operators with a sustainable focus that “sell Namibia”³⁵.

5.3 Some examples of specific Namibian accommodation providers' investment trends:

The Leading Lodges of Africa

- An investment group led by a Belgian entrepreneur has led the way for Namibia's entry into the 4 - 5 star luxury and service area.
- They have acquired some existing facilities and built others in key areas with a business model that brings class, elegance, and service to attract the higher end, tourism client.
- They have invested tens of millions in Namibia and to date, their model has shown impressive results.



Leading Lodges of Africa

Leading Lodges of Africa is a Namibian hospitality company hosting a portfolio of superior luxury African lodges. Catering to high-end travelers their goal is to provide a high standard of service that includes efficiency and personalized attention in a relaxing and natural atmosphere. They work with eight lodges in total that are located in The Etosha National Park, The Sossuvlei, The Okavango River, The Kalahari Desert and Windhoek City. For more information see www.leadinglodges.com.

Wilderness Safaris

- A leader throughout Africa in providing high-end, quality African safari experiences. They develop, package, market, and sell “the experience of a lifetime” in Africa.
- They have a Namibian registered company that runs their affairs.
- Their investment in and commitment to community based tourism and sustainable tourism is well known.

³⁵ For the NTB's list of outbound tour operators with a sustainable focus see appendix 6.

- Their facilities have won several international awards recognizing their high achievements in sustainable tourism such as the World Legacy Award (2003) and The American Society of Travel Agents Environmental Award (2003).

Wolwedans

- Holds one of the Concessions in the NamibRand Reserve area (featured in this research paper).
- They are a niche operator, not attracting masses of people, but earning their income through a high-quality, low impact product.
- This company was founded by a local Namibian and has grown from strength to strength for decades.
- They are regular and heavy investors in the nature reserve, the various tourism concessions and the foundations and educational trusts that have been established.

The United Africa Group (UAG)

- They have several accommodation and hospitality properties in Namibia and are continuing to invest and develop more.
- This is a Namibian black-owned company.
- They are currently involved in major business and hospitality enterprises, including the planned N\$800 million (US\$100 million) Namundjebo Plaza on prime real estate in the Central Business District of Windhoek.
- The United Africa Hospitality Group has formed a joint venture with Protea Hospitality Corporation forming a new entity, namely Protea Hotels Namibia. Protea Hotels owns 49% in this joint venture and will add United Africa's four properties to its present portfolio of two hotels in Namibia.

Namib Sun Hotels

- Part of the naturally Namibian Ohltdhaver and List Group of Companies (O & L).
- This company has been around for decades and they have corporate interests in various fields and employ over 4,000 Namibians.

- O&L has invested billions of Namibia dollars in its companies and its commitment to an economically strong, environmentally sound, peaceful and prosperous Namibia.
- In 2007, the O&L Group formed a partnership with IFA Hotel & Resorts, Ltd, South Africa. The partners have agreed to invest N\$550 million (US\$70 000) in the redevelopment and upgrade of the Namib Sun Hotels establishments in Caprivi, Etosha, Windhoek and Swakopmund.
- Preservation of the coastline and the Caprivi wildlife and environments and their biodiversity is key to the profitability of their products.

Islands in Africa

- Impalila Island Lodge Ntwala and Susuwe Island Lodge in the Caprivi Region of Namibia are fabulous and represent an investment of millions of Namibia dollars.
- They have a joint partnership with both the Impalila and Mayuni communal conservancies.
- It is CBNRM working in a business model and generating profits that justify the investment. Both the investor and the communities are winning with this model.

The Gondwana Desert Collection

- This mid-market, group tour, accommodation provider has established itself in the South of Namibia, with a new product near the Etosha National Park, the Gondwana Etosha Collection.
- This group of Namibian entrepreneurs which includes black Namibian investors has a model of buying the land they build on and developing the product around that land to create new and innovative products.
- This group is a part of the Namibian Protected Desert Areas Association and bases its product on the unique beauty and experience in the Namib Desert, Nama Karoo Desert, Kalahari Desert, and the Succulent Karoo Desert.
- Sustainable tourism is a part of their business plan with the Canon Self-Sufficiency Center based at their Canyon Lodge product. This center is a

small farming operation. The center supplies the Canyon Lodge, but also other lodges in the Collection. Furthermore, the Self-Sufficiency Center creates much-needed jobs in southern Namibia.

Visions of Africa Safari Company

- A leader in providing products that suit the emerging preference for upscale, boutique tourism products in Africa.
- Strong focus on selling ST. They focus on maintaining nature and bringing benefits to the community and the country.

Namibia Country Lodges (NCL)

- Part of a South African parent company, but is a fully registered Namibian company.
- Among the most innovative mid-market accommodation providers in the country.
- They work closely with communities and seek business opportunities in a win-win model.
- Currently, they have joint venture operations in several communal conservancies.
- Such partnerships with communities are the recipe for completely sustainable land-use and conservation through tourism.
- Notably, NCL has worked hand in hand in the recent declaration of Twyfelfontein as a World Heritage Site.

The Namibia Wildlife Resorts (NWR)

- NWR has the unique position of being wholly owned by GRN, but ostensibly operating as a profit-making hospitality business.
- NWR has 23 properties throughout the country.
- In past years, GRN did not invest funds in the company and it was allowed to deteriorate and languish with little effective investment in staff development, maintenance, and product expansion.
- In 2006, the government invested cash and loan guarantee for the upgrade and re-positioning of this product.

- New management has taken the Government investment and created a new logo, new brand, new image and a new lodge, the Sossus Dune Lodge in iconic Sossusvlei.
- Some NWR properties that require major investment just to meet operational costs are being placed on the market for private sector joint partnership or outsourcing arrangements (though no Government land will be alienated). Some of these will present exciting opportunities and increase tourism product supply in Namibia.

6. Conclusion

The research process has identified several key points regarding Namibia and the development of sustainable tourism.

- Demand-driven sustainable tourism in Namibia supported by the Government, NGOs working in the field, the Namibia Tourism Board and the private sector of the tourism industry, can generate income and profits that justify the investment.
- The key for success in sustainable tourism in Namibia is all stakeholders working together.
 - While all do not always agree, each brings a needed aspect to the table.
 - All recognize and support the need to protect and preserve biodiversity and the delicate Namibian ecosystem, while addressing job creation and poverty alleviation for the majority of the people.
- The future of the country revolves around judicious, sustainable use of all of our resources.
 - Natural conditions like drought, desertification, excessive heat, and the preservation of endangered species are issues that must be addressed.
 - Global warming issues, rises in fuel prices, renewable energy concerns, water utilization, waste water management and other environmental management issues are no longer optional concerns - the natural resource base in Namibia is the lifeline for the survival of the country and

as such it must be protected by all: urban or rural, conservative or liberal, rich or poor.

- Despite various challenges, CBNRM is working in Namibia and presents a good working model for other countries considering communal conservancies as a method of development in rural areas.
- Sustainable tourism presents a win-win formula for all stakeholders.

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Appendices

Appendix 1: A timeline for policies, regulations and entrance into the sector of key stakeholders in Namibia.

Relevant pre-independence laws and policies:

- Accommodation Establishments and Tourism Ordinance (No. 20, 1973)
- Namibian Professional Hunter's Association formed – 1974
- Nature Conservation Ordinance of 1975, established state protected areas
- Early 80's – Community Game Guard system launched in the Northwest to curb poaching
- Hospitality Association of Namibia formed – 1987
- Namibian State-owned Protected Areas³⁶
- Ai-Ais Hot Springs/Huns Mountains – proclaimed 1968/1988 resp.
- Cape Cross Seal Reserve – 1968
- Caprivi Game Park – 1968
- Daan Viljoen Game Park – 1968
- Etosha National Park – 1975^{37*}
- Gross Barmen Hot Springs – 1968
- Hardap Recreation Resort – 1968
- Khaudum Game Park – 1989
- Mahango Game Park – 1989
- Mamili National Park – 1990 (March 1)
- Mudumu National Park – 1990 (March 1)
- Namib-Naukluft Park – 1979
- National Diamond Coast RA – 1977
- National West Coast RA - 1973
- Naute Recreation Resort – 1988
- Popa Game Park – 1989
- Skeleton Coast Park – 1971
- South West Nature Reserve – 1970
- Von Bach Recreation Resort – 1972
- Waterberg Plateau Park – 1972

1990

- Independence – March 21, 1990 – adoption of Constitution with Article 95(l)
- Creation of Ministry of Wildlife and Conservation
- Cheetah Conservation Fund in Namibia founded

1991

- Tourism Related Namibian Business Association formed
- Namibia Tourism Establishment Survey conducted
- Namibia Airlines, under TransNamib flies to Frankfurt

³⁶ See appendix 1 for a list of all of the Namibian State-Owned Protected Areas

³⁷ Though the area of Etosha was established as a national park 100 years ago during the German Colonial exploitation of Namibia, it was not named a protected area until 1975.

1992

- Hoff & Overgaard complete study on tourism and tourism potential in Namibia.
- Namibia Visitor Exit Survey conducted.
- Fenata formed.
- Namibia Airlines, still operating under TransNamib, establishes service to London.
- Lufthansa extends its Johannesburg service to Windhoek.
- Regional Tourism Organization of Southern Africa (RETOSA) is formed by the 14 member states.
- CARAN, the Car Hire Association is formed.
- Green Plan tabled by President Sam Nujoma at the UN Conference on Environment and Development.
- Ministry of Environment begins plans for law launching communal conservancies.

1993

- Namibia Dollar takes the place of SA Rand, but still fixed to Rand.
- First community-owned and managed tourist camp is developed at Spitzkoppe.
- EU funds a national tourism study leading to formulation of national tourism policy.
- Green Plan (1992) led to the 12-Point Plan for Integrated and Sustainable Environmental Management; adopted by Parliament.
- Funding from the WWF-LIFE project begins.
- IRDNC wins Goldman Grassroots Environmental Prize for Africa.
- CBNRM begins to evolve as a partnership between GRN and NGOs and rural communities.

1994

- Ministry changes name; now the Ministry of Environment and Tourism (MET).
- National Tourism Policy 'white paper' completed and approved by Parliament.
- Visas for tourists extended to 90 days.
- Tour Guides Association of Namibia formed.
- Namibian Academy for Tourism and Hospitality (NATH) training opened; first tour guide training course offered.
- Association of Namibian Travel Agents formed.
- Namibia Tourism Development Program (NTDP) launched with EU support.
- IRDNC wins the United Nations Environmental Program Global 500 Awards.

1995

- Namibia Community Based Tourism Association (NACOBTA) founded.
- Namibia Civil Aviation sets regulations on the legal requirements for transporting paying passengers.
- National Development Plan 1 (NDP1).
- Cabinet approves communal conservancy policies; law begins to be drafted.

1996

- Nature Conservation Ordinance of 1975 was amended (Act no. 5 of 1996) – legally creating communal conservancies.
- Wilderness Safaris Namibia, in partnership with the community, opens Damaraland Camp in the Kunene Region (this facility has been recognized internationally for its far-reaching eco-tourism, quality service-based tourism products, training programs for the local community and community partnership model).

1997

- Air Namibia as a Pty, separate from TransNamib, begins service to Namibia.
- Directorate of Tourism established in re-structuring at MET.
- Namibia Visitor Survey of 1996/7 conducted.
- IRDNC wins the Knights of the Order of the Golden Ark from the Netherlands.
- PolyTechnic Institution of Namibia issues the first certificates in tertiary hospitality training.
- Namibia accepted as a member of the World Tourism Organization.
- President Sam Nujoma announces the Conservation Vision of Namibia, known as the 'President's Vision'.

1998

- Promulgation of the Namibia Wildlife Resorts Act (NWR) Act (Act No. 3, 1998).
- Official launch of Namibia's Communal Area Conservancy Program.
- Four-year BA degree in Tourism launched at the University of Namibia.
- MET in partnership with the Desert Research Foundation establishes the Gobabeb Training and Research Center (GTRC) in the Namib Desert.
- Biodiversity Country Study completed.
- First communal conservancies were gazetted: Nyae Nyae, Salambala, Torra, and #Khoadi-//Hôas.
- President Nujoma officially launches the CBNRM program.
- Republic of Namibia wins the WWF International 'Gift of the Earth' Award.
- Damaraland Camp – Torra Conservancy and Wilderness Safaris Namibia receive the Silver Otter Awards for Tourism.

1999

- Namibia's Holiday and Travel Expo is launched with 45 exhibitors (by 2007, this has grown to 276 exhibitors).
- NWR formally registered.

2000

- Promulgation of the Namibia Tourism Board Act (Act no. 21 of 2000).
- Government finalized and promulgated Vision 2030.
- CBNRM Association formed with MET and NGOs – NASCO.
- IRDNC, Caprivi wins Namibia Nature Foundation Environmental Award.

2001

- Promulgation of Forest Act, creating Community Forests.
- NTB officially opens with new CEO.
- The Oskop Conservancy in the Hardap Region becomes the first communal conservancy in southern Namibia.

- Ugab Wilderness Camp in Tsiseb Conservancy is launched.
- Torra Conservancy won the Namibia Professional Hunter's Association (NAPHA) Conservationist of the Year Award.
- Salambala Conservancy wins Namibia Nature Foundation Environmental Award.

2002

- Official visitor arrivals form revised.
- Namibia Visitor Exit Survey conducted.
- National Biodiversity Strategic Action Plan (NBSAP) finalized.
- NACSO wins Condé Nast Traveller Magazine's 2002 Environmental Award.
- World Summit on Sustainable Development takes place in Johannesburg.
- NACOBTA launches its (community private sector) joint ventures unit – first tender process takes place.

2003

- Ai-Ais Richtersveld Transfrontier Conservation Park Agreement is signed between President Nujoma of Namibia and President Mbeki of South Africa.
- Hotel School at the Polytech Opens; CBNRM incorporated into National Diploma.
- King Nehale Gate of Etosha National Park opens.
- IRDNC wins Cheetah Conservation Fund's Conservationist of the Year Award.
- Uukwaluudhi Conservancy and MET win Namibia Nature Foundation Environmental Award.
- Tsandi Royal Homestead home of King Taapopi in the Uukwaluudhi Conservancy opens to tourists.

2004

- NTB regulations completed and gazetted; registration for all tourism enterprises begins and levy for accommodation sector is implemented.
- Tourism Industry adopts Transformation Charter – First sector in the country to do so.
- NDP 2 promulgated.
- Namib-Naukluft Park Management and Tourism Development Plan.
- Manpower Survey done by NTB with support from NTDP (EU).
- NTB Launches national tourism marketing strategy.
- WWF/LIFE wins NAPHA Conservationist of the Year Award.
- Torra Conservancy wins 2004 UNDP Equator Prize for the best Community Environmental Project in the world.
- NTB announces the core brand values as 'Natural, Rugged, Soulful and Liberating'.
- Uis Information Center in Tsiseb Conservancy opened by EU Ambassador.
- Sesheke Bridge linking Namibia and Zambia completes the 2100 km Trans-Caprivi Highway between Walvis Bay and Lusaka.
- The G!hunku Arts and Crafts Cultural Center opens in Tsumkwe.
- National Monuments Council initiates Rock Art restoration projects at Twyfelfontein and Brandberg.

- Eco-Awards are introduced for the hospitality industry.
- ICEMA, LIFE plus and IRDNC Kunene/Caprivi CBNRM Support Projects are launched.

2005

- Transfrontier Conservation Areas created; treaty with South Africa and Angola.
- NACSO and the NNF win Namibia National Science Award in the Best Category: Best Awareness and popularization for the book Namibia Communal Conservancies – A Review of Progress and Challenges.
- Wilderness Safaris and Torra Conservancy's Damaraland Camp Lodge win World Travel and Tourism and Council's 'Tourism for Tomorrow Conservation Award 2005'.
- Opening of Grootberg Lodge in #Khoadi-//Hôas Conservancy, west of Kamanjab.
- 'Naukluft Experience' a joint effort by local farmers to increase tourism and benefit the local community is launched.
- Parliamentary Committee visits conservancies in the Northwest and endorses communal conservancies for contributing to national development.
- Permanent Technical Team on Land Reform spearheaded by the Prime Minister's Office, recognizes communal conservancies and community forests as CBNRM models to be followed.
- N//Goabaca campsite at Poppa Falls upgraded and reopened.
- Hoada community campsite opened near Kamanjab.
- Ombalantu Baobab Campsite and Heritage Site opened.

2006

- Tourism Investor's Roadmap complete.
- Tourism Satellite Account Report launched.
- National Biodiversity Strategy and Action Program.
- SPAN Project launched.
- Tourism Unit Standards for various vocations and qualifications in hospitality finalized, approved by NQA.
- Turn-Around Strategy for NWR, new Management Team hired; N\$120 .
- Government Loan Guarantee
- Four Deserts Route is opened with 34 participants
- 13 Community Forests in communal areas in Northern Namibia and the Caprivi are proclaimed
- Namibian Institute of Culinary Education (NICE) opens
- KA/ZA Transfrontier Conservation Area receives approval from Tourism Ministers of the five countries involved
- Aus Information Center Opens
- Three Concession Areas: Hobatere, Palmwag, and Etendeka will be proclaimed part of a National Park, linking Etosha to the Skeleton Coast Park
- Number of communal conservancies gazetted are 50

2007

- Updated National Tourism Policy Draft Paper rolled out to Stakeholders
- Cabinet approves the Concessions Policy
- Mata-Mata Gate Opens
- Seendlingsdrift Transfrontier Park Opens border post
- Stakeholder discussions on NDP3 begun
- MET continues work on a new Parks and Wildlife Management Bill
- MET strengthens its Vision and Mission Statements
- Environmental Management Bill passes Parliament
- NTB begins marketing program for China as a source market
- Cabinet approves budget for WC2010 Technical Committee
- 100th Anniversary of Etosha National Park
- Minister announces revised Parks and Wildlife Management Bill to be tabled in Parliament
- New entrance gate to Etosha opened at Oshivelo (as per MET regulation) to benefit the Hai||om community is set to develop there
- Twyfelfontein declared World Heritage Site
- Prime Minister launches information gathering process for TESEF, Transformational Economy and Social Empowerment Framework to move towards a national legislative framework for black economic empowerment
- Khowarib community campsite upgraded and reopened

Appendix 2: Registered Communal Area Conservancies

	Conservancy Name	Region	Biome	Date Registered	Size km ²
1	Nyae Nyae	Otjozondjupa	Woodland	Feb 1998	9003
2	Salambala	Caprivi	Woodland	June 1998	930
3	Torra	Kunene	Desert	June 1998	3522
4	#Khoadi //Hôas	Kunene	Desert savanna	June 1998	3366
5	Uibasen-Twyfelfontein	Kunene	Desert savanna	Dec 1999	286
6	Doro !Nawas	Kunene	Desert savanna	Dec 1999	4073
7	Kwandu	Caprivi	Woodland	Dec 1999	190
8	Mayuni	Caprivi	Woodland	Dec 1999	151
9	Wuparo	Caprivi	Woodland	Dec 1999	148
10	Puros	Kunene	Desert	May 2000	3568
11	Tsiseb	Erongo	Desert	Jan 2001	8083
12	Ehi-Rovipuka	Kunene	Savanna	Jan 2001	1975
13	Marienfluss	Kunene	Desert	Jan 2001	3034
14	Oskop	Hardap	Shrub savanna	Feb 2001	95
15	Sorris Sorris	Kunene	Desert savanna	Oct 2001	2290
16	Mashi	Caprivi	Woodland	Mar 2003	297
17	Omatendeka	Kunene	Savanna	Mar 2003	1619
18	Otjimboyo	Erongo	Desert savanna	Mar 2003	448
19	Uukwaluudhi	Omusati	Savanna	Mar 2003	1437
20	!Khob !Naub	Karas	Shrub savanna	July 2003	2747
21	//Gamaseb	Karas	Shrub savanna	July 2003	1748
22	//Huab	Kunene	Desert savanna	July 2003	1817
23	Orupembe	Kunene	Desert	July 2003	3565
24	Sanitatas	Kunene	Desert	July 2003	1446
25	Anabeb	Kunene	Savanna	July 2003	1570
26	Sesfontein	Kunene	Savanna	July 2003	2591
27	Okangundumba	Kunene	Savanna	July 2003	1131
28	N#a Jaqna	Otjozondjupa	Woodland	July 2003	9120
29	Ozondundu	Kunene	Savanna	July 2003	745
30	#Gaingu	Erongo	Desert-Savanna	Mar 2004	7677
31	Joseph Mbambangandu	Okavango	Woodland-Savanna	April 2004	36
32	African Wild Dog	Otjozondjupa	Camelthorn savanna	Sep 2005	3824
33	!Gawachab	Karas	Dwarf shrub savanna	Sep 2005	132
34	George Mukoya	Okavango	Forest savanna & woodland	Sep 2005	486
35	King Nehale	Oshikoto	Saline desert/shrub savanna/pan	Sep 2005	508
36	Muduva Nyangana	Okavango	Forest savanna & woodland	Sep 2005	615
37	Okamatapati	Otjozondjupa	Camelthorn savanna	Sep 2005	3096
38	Otjituuo	Otjozondjupa	Camelthorn savanna	Sep 2005	6133
39	Ozonahi	Otjozondjupa	Camelthorn savanna	Sep 2005	3204
40	Uukolonkadhi Ruacana	Omusati	Mopane savanna	Sep 2005	2993

41	Shamungwa	Okavango	Forest savanna & woodland	Sep 2005	53
42	Sheya Shuushona	Omusati	Mopane savanna	Sep 2005	5066
43	Kasika	Caprivi	Forest savanna & woodland	Dec 2005	147
44	Impalila	Caprivi	Forest savanna & woodland	Dec 2005	73
45	Balyerwa	Caprivi	Forest savanna & woodland	Oct 2006	223
46	Ondjou	Otjozondjupa	Camelthorn savanna	Oct 2006	8,729
47	Kunene River	Kunene	Mopane savanna	Oct 2006	2,764
48	Sobbe	Caprivi	Forest savanna & woodland	Oct 2006	404
49	/Audi	Kunene	Desert savanna	Oct 2006	335
50	Ohungu	Erongo	Desert savanna	Oct 2006	1,211
	TOTALS				118,705

NACSO - As of November, 2006

Appendix 3: Other related proposed policies and legislative efforts (as reported by the WWF-LIFE Plus project).

- Parks and Wildlife Act and Regulations
 - LIFE Project staff, along with the SPAN Project and legal specialists, were requested to participate with an internal review of the latest version of the Act in September.
 - Considerable constructive inputs and changes to the draft were recommended. The MET is seeking to approve the Act early in 2008.
- Parks, Residents and Neighbours Policy
 - Developed under the SPAN project, this policy builds upon a previous version that was originally drafted in 1998; the policy is still pending.
- Human Wildlife Conflict Policy
 - A case study on Human / Animal conflict issues, funded by the WWF Global Species and Macroeconomics Office, was finalized.
 - The case study looked at the Human/Animal conflict issue in depth, focusing on economic consequences, mitigating practices, communal solutions and other aspects. Portions of the paper have contributed to the evolving policy on Human / Wildlife Conflict
- MET Five-Year Strategic Plan
 - This plan is complete and is critical in planning the direction for MET's budget, staff training focus, and policy guidelines.
- Communal Lands Bill Regulations
 - Action begun on this bill in 2006; training for various communities affected by these regulations has been undertaken by NGOs working on this issue
- Freshwater Fisheries Regulations
 - Good progress is being made towards the potential harmonization of Fresh Water Fishery regulations and the role of conservancies.
- Awareness Creation Related to Harmonized Policy and Legislation
 - NGOs are facilitating increased awareness of the need to harmonize inter-ministerial policies and legislation by logistically and financially (where possible) supporting study tours and conferences that include key stakeholders (i.e., communal land boards, regional councils, parliamentarians, etc.).
 - In this regard, considerable effort has been made to familiarize Communal Land Boards with the conservancy program and its attendant legal foundation.

Appendix 4: New tourism-related development and planned development

- GRN has decided to consolidate the offices of the Ministry of Environment and Tourism
 - While this is not directly related to supply of tourism products in Namibia, it does speak to GRN's awareness of the value of the tourism product and the huge contributions of the sector to the Namibian economy.
 - Previously, MET offices were spread over three different locations in the capital city. With this consolidation, the administration and policy development role of the Government will become more efficient and effective.
- Government Special Projects
 - The government has approved millions of dollars for the development of financially sustainable tourism enterprises in both urban and rural areas to alleviate poverty, assist in rural development, spread benefits from tourism and to stimulate economic growth in the country.
 - A number of small lodges and B&B's will be constructed under this project.
- The Millennium Challenge Account
 - Part of the Millennium Challenge Corporation of the USA is engaged in the final stages making a significant investment in various sectors of the Namibian economy.
 - Tourism is one of the sectors earmarked for this investment. The figures currently discussed are between \$70-90 million USD for various tourism development projects that will address job creation and poverty alleviation.
 - A part of the tourism proposal involved the joint venture construction of up to 24 new lodges in state protected areas, National Parks and communal conservancies.
 - The majority of the funds requested in the MCA investment proposal are for national park infrastructure development, training and capacity building, game farms (to support the growth of exotic wildlife for conservancies), support for better arrival statistics collection support for destination marketing at the NTB, and the development of tourism information hubs.
 - But, this investment is not guaranteed.
 - The Due Diligence process of the MCA program is long-term and thorough with changing teams who each ask for clarification of details already submitted, review each investment based on their team's assessments, and interpret Namibia's tourism development needs through the prism of what Washington-based MCC committees decide is important for Namibia's development.
 - To be sure, the amounts mentioned are more than substantial and a high standard must be met to give assurances of the efficient and transparent use of the funds. To date, the process has taken more than 18 months with 7-8 months remaining before the process can be completed; and if successful, possibly another 6-8 months before the

first funds are distributed. Until then, the levels of the investment are only speculative.

- Caprivi Park infrastructure upgrades
 - Significant investment has been gathered for upgrades to park infrastructure in the Caprivi.
 - Conservancies and communities living inside and near National Parks will benefit significantly.
 - There is on-going regional Kavango/Zambezi (Ka-Za) program promises substantial investment in roads, training and capacity building, tourism enterprises and other economic development projects, including.
 - In addition to this, the German and Spanish Government have contributed more than N\$85 million for needed upgrades to the entire park structure in the Caprivi.
- Zambezi Waterfront Project
 - Tens of millions have been pledged to develop a waterfront development in the Katima in the Caprivi.
 - This development will have a luxury accommodation facility, activities, shopping, and business office space.
- Namport millions in renovations and upgrades to facilities
 - At the Coast of Namibia, NamPort, and the Government parastatal responsible for running the ports and docks at the country have received hundreds of millions in donor support and GRN investment to update all port facilities.
 - Within this ongoing building plan is some allocation for improved cruise ship docking and disembarking facilities. The current poor state of cruise ship infrastructure is a impediment to tourism development in this particular sub-sector of the industry.

Appendix 5: NTB figures – Compiled September 30, 2007

Accommodation Establishments	
Backpackers Hostels	26
Bed & Breakfasts	98
Campsites	102
Camping & Caravans	8
Guest house	99
Guest farm	160
Hotels	51
Hotel Pension	47
Lodge	141
Restcamp	58
Self catering	345
Permanent Tented Camp	22
Tented Lodge	14
Sub-Total	1,171
Regulated Businesses	
Activity Operator	63
Air Charter Operator	18
Conference Centre	1
Booking Agent	89
Foreign Tour Operator	67
Shuttle & Transport Services	69
Tour Facilitator	64
Trophy Hunting Operator	446
Tour & Safari Operator	244
Vehicle Rental Operator	61
Sub-Total	1,122
TOTAL	2,293

Appendix 6: A sample of outbound travel Agents booking eco-tourism products from Namibia's source markets.

The Netherlands	
African Holiday	info@africanholidays.nl
Best Tours Nederland	besttoursnederland@planet.nl
Cycletours	info@cycletours.nl
Discover Reizen	info@discoverreizen.nl
Flach Travel Company	reizen@flachtravel.nl
Impala Tours	info@impalatours.nl
Travelhome	info@travelhome.nl
Jambo Safari Club	js@jambo.nl
Germany	
Abacus Touristik	info@abacus-touristik.de
Afrika Plus	info@afrikaplus.de
Best of Travel Group	monika.mittendorf@bosp.de
Dertour, GmbH & Co.KG	info@dertour.de
TUI Deutschland GmbH	
Thomas Cook AG	andreas.kogler@thomascookag.com
Iwanowski's Indiv. Reisen	iwanowski@afrika.de
Ladies' Travel	info@ladiestravel.de
Sandveld Tours	service@sandveld.de
Horizont Fernreisen	info@horizont-fernreisen.de
Belgium	
Sunworld	info@sundworld.be
Anders Reizen	info@andresreizen.be
Odysseus	Africa@odysseus.be
Thomas Cook Belgium	info@thomascook.be
Jetair/TUI Belgium	info@vtb.jetair.be
Switzerland	
A + M Africa Tours	travel@africatours.ch
Alpin Travel, GmbH	info@alpintravel.ch
Dreamtime Travel AG	info@dreamtime.ch
Mawi Reisen Ag	bischofszell@mawi.ch
ITO Reisen AG	ito@itoreisen.ch
Austria	
TUI-ReiseCenter Austria	Klaus.k@tui.co.at
Jet Touristik	info@jet-touristik.com
Alpenschule Innsbruck	Bernhard.zoehrer@asi.at
United Kingdom	
Acacia Adventure	info@acacia-africa.com
Bushbaby	info@bushbabytravel.com
Activity Breaks	Alison@mahlatini.com
Audley Travel	Africa@audleytravel.com
Experience Holidays	info@experienceholidays.co.uk
Footprint Adventures	sales@footprint-adventures.co.uk
Global Village Travel	sales@gvillage.co.uk
Global Vision International	info@gvi.co.uk
Nomad African Travel	nomadat@onetel.com
Rainbow Tours	info@rainbowtours.co.uk
Raleigh International	info@raleigh.org.uk
Wilderness & River Safaris	Adventure@wild-africa.co.uk