



Southern African Development Community

SADC Tourism Programme
2020-2030





Southern African Development Community (SADC) Tourism Programme 2020 - 2030

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About SADC

The Southern African Development Community (SADC) is an organisation founded and maintained by countries in southern Africa that aim to further the socio-economic, political and security cooperation among its Member States and foster regional integration in order to achieve peace, stability and wealth. The Member States are: Angola, Botswana, Union of Comoros, the Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, United Republic of Tanzania, Zambia and Zimbabwe.

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Acronyms

ATA	Africa Travel Association
BSA	Boundless Southern Africa
COM	Council of Ministers
COSO	Committee of Senior Officials
CTO	Caribbean Tourism Organisation
DEA	Department of Environmental Affairs, South Africa
ECOWAS	Economic Community of West African States
EMP	Environmental Management Plan
ETC	European Travel Commission
FANR	Food, Agriculture and Natural Resources
GBP	British Pound
ICP	International Conservation Programme
ICT	Information Communication Technology
IORA	Indian Ocean Rim Association
KAZA	Kavango Zambezi Transfrontier Conservation Area
M&E	Monitoring and Evaluation
MICE	Meetings, Incentives, Conventions and Exhibitions
MOU	Memorandum of Understanding
N=	Number of respondents in survey
NGO	Non Governmental Organisation
PATA	Pacific Asia Tourism Association
PPF	Peace Parks Foundation
PR	Public Relations
RETOSA	Regional Tourism Organization of Southern Africa
RISDP	Regional Indicative Strategic Development Plan
SADC	Southern Africa Development Community
SANPARKS	South African National Parks
SDGS	Sustainable Development Goals
TCU	Tourism Coordinating Unit
TFCA	Transfrontier Conservation Area
TOC	Table of Contents
TP	Transfrontier Park
USD	United States Dollar
UNWTO	United Nations World Tourism Organisation
VAT	Value Added Tax
WTTC	World Travel and Tourism Council
WEF	World Economic Forum

Executive Summary



This SADC Tourism Programme serves as a roadmap to guide and coordinate the development of a sustainable tourism industry in the region and to facilitate the removal of barriers to tourism development and growth.

PROGRAMME CONTEXT:

The Tourism Programme will be implemented taking due cognisance of global and continental tourism programmes including the United Nations World Tourism Organisation's (UNWTO) Agenda for Africa, African Union's Agenda 2063, East African Community's (EAC) tourism programmes and Common Market of Eastern and Southern Africa's (COMESA) tourism initiatives.

The Programme will be implemented within the policy and planning guidelines provided by the SADC Regional Indicative Strategic Development Plan (RISDP) (2015-2020), the original SADC Protocol on the Development of Tourism (1998) and the subsequently amended SADC Protocol on the Development of Tourism (2009).

Various tourism institutional developments in SADC during the past five years were considered in drafting the Tourism Programme and in formulating the institutional proposals contained in this document. These include the decisions taken by the Committee of Tourism Ministers in 2017 to reactivate the Tourism Coordinating Unit in SADC and by the Council of Ministers in August 2018 to wind up the Regional Tourism organisation of Southern Africa (RETOSA). During its August 2018 meeting, Council also approved the inclusion of Ministers responsible for Tourism in the Joint Committee of Ministers of Environment and Natural Resources and in the Organ of Politics, Defence and Security Cooperation, thereby setting the scene for multi-sectoral collaboration in SADC.

In addition other SADC initiatives, documents, frameworks and policies were considered in formulating the document. These include the SADC Transfrontier Conservation Areas (TFCA) initiative, which is informed by the SADC Regional Infrastructure Development Master Plan (RIDMP, 2012), the SADC TFCA Programme (2013) and the establishment of Boundless Southern Africa (2008). SADC protocols considered include the SADC Protocol on Wildlife Conservation and Law Enforcement (1999), the Revised Protocol on Shared Water Courses (2002) and the Protocol on Trade in Services (2012).

SADC TOURISM STATUS

According to UNWTO global tourism has grown consistently over the past two decades and the only downswing in global tourist arrivals during this period occurred in 2008/9, during the height of the global economic crisis. The global and regional tourism industry is affected by and should adapt to various political, environmental, social and technological trends that shape tourism growth.

Tourism is a cornerstone of the SADC economy, together with agriculture, mining and other services. It is a major value adder to global and regional economies and a labour intensive industry that directly contributed around 2.8% of the total SADC GDP in 2017 and when considering indirect and induced impacts it contributed as much as 8% of SADC GDP¹. The sector directly sustained around 2.5 million jobs in the region in 2017; in total more than 6.3 million jobs depended on tourism.

The top seven tourism countries (RSA, Zimbabwe, Botswana, Mozambique, Mauritius, Namibia and Tanzania) received more than 78% of all international tourist arrivals to SADC and almost 85% of tourism receipts in 2017. The majority of Member States on mainland Africa suffer from small market shares and low tourism economic yields. On average SADC countries receive US\$51 international tourist expenditure per capita population per annum, almost double the average per capita tourism revenue for Africa (US\$27). Average receipts per arrival in SADC were US\$670 in 2016, below the global average of US\$1004 per arrival, but substantially higher than the average US\$578 per arrival for the continent as a whole. The Indian Ocean Islands (high-value, capped-volume resort tourism), Angola (high-value business tourism) and Tanzania (high-value safari tourism) captured the highest receipts per visitor.

The World Economic Forum (WEF) Tourism Competitiveness Index indicates that major tourism competitiveness challenges at regional level include brand building and image management, ICT and Internet access, international access and openness (including air access policies and visa regimes), ground and air access infrastructure, conservation of natural resources as USPs and improvement of cultural experiences. However, the scope, scale and development levels of tourism differ substantially among SADC Member States and as such Member States have diverse and varying needs and priorities for tourism support and facilitation.

A comparison of tourism structures of multi-country tourism organisations e.g. Caribbean Tourism Organisation (CTO), European Travel Commission (ETC), Pacific Asia Travel Association (PATA) and others, provides various pointers regarding the value and focus of regional tourism organisations. These include a) facilitation, empowerment and partnership-building are valued capabilities, b) breaking down barriers to travel between countries is a key focus area for such organisations, c) most organisations do regional image and brand building, d) they are established through broad buy-in, e) public-private sector collaboration is essential to their success, f) institutional partnerships are key, g) they deliver tangible benefits, g) they are strategically focused, h) they are operationally “lean and mean”, i) they are built on consensus and j) they are adequately and consistently funded.

In an online survey, regional tour operators rated conditions for private sector to do business effectively in SADC, (such as customs conditions and practices, taxation, cross-border access, tourism safety and security and investment conditions) as poor. Operators rated immigration and visa conditions, as well as collaboration between tourism and other sectors that affect the industry particularly poorly.

When asked to rate the importance of potential activities for inclusion in the SADC Tourism Programme over the next 5 years, almost 80% of respondents rated “improving visa and immigration practices” as critically important for SADC to address. Other issues deemed critically important by more than 60% of respondents are greater collaboration between tourism and other sectors that affect tourism, marketing and branding the region, facilitating and coordinating tourist safety and security and facilitating suitable air access policies.

The summary of Strengths, Weaknesses, Opportunities and Threats (SWOT) reveals a wide range of factors that need to be addressed in the interest of regional tourism advancement, which largely support the survey and desk-research findings.

STRATEGIC DIRECTION

The Vision of the Programme for 2030 is that growth in cross-border, multi-destination travel in SADC will exceed average global tourism growth levels. The Mission is to advocate, facilitate, and effectively coordinate tourism policies, programmes and practices in the region in collaboration with Member States.

¹ Adding together the direct, indirect, and induced impacts shows the total economic impact of Travel & Tourism. Direct impacts include only direct transactions by tourists for tourism services and products such as accommodation, recreation, transportation, and other related sectors; indirect impacts are contributions across the tourism supply chain and induced impacts occur when money is spent in the local economy by employees working in jobs supported by tourism both directly and indirectly.

The SADC Tourism Programme strives to achieve the following objectives:

- Exceeding average global growth levels in tourism receipts and arrivals to and within the region, as measured by UNWTO's Tourism Barometer.
- Broadening the spread of tourism arrivals and receipts among SADC Member States, i.e. increasing the number of countries visited on average.
- Extending the average length of stay of visitors in the SADC region.
- Increasing return visitation to the region.
- Harmonising policies that are geared at the development and growth of tourism in SADC.

Three principles underpin SADC's Tourism Programme namely a) advancing sustainable tourism development and promoting economic inclusion and transformation b) maximising partnerships and c) following a whole-of-government approach. Given SADC Tourism Coordinating Unit's (TCU's) limited resources and the fact that tourism is a highly integrated sector, SADC TCU will, depending on the issues at stake, take a three-tiered approach in advancing the SADC Tourism Programme namely to a) "advocate", b) "facilitate" and c) "coordinate and monitor implementation".

KEY FOCUS AREAS

Given the challenges and opportunities highlighted and the Programme's vision and objectives, the SADC Tourism Programme will pursue five core strategic goals, namely:

- Goal 1: Stimulating visitor movement and flows to and within the region.
- Goal 2: Improving and defending the tourism reputation and image of the region.
- Goal 3: Developing tourism in Transfrontier Conservation Areas.
- Goal 4: Improving quality of visitor experiences and satisfaction levels.
- Goal 5: Maximising tourism partnerships and collaboration.

PROGRAMME GOALS, STRATEGIES AND ACTIVITIES

The five goals will be addressed through the following programme goals, strategies and actions.

Goal 1: Stimulating visitor movement and flows to and within the region

Strategy 1.1: Immigration Facilitation Programme

- Harmonising visas
- Improving border posts
- Improving immigration services

Strategy 1.2: Air and Road Access Improvement Programme

- Improving air access policies and practices
- Harmonising tourism customs costs and requirements
- Improving priority tourism roads
- Improving road and interpretative signage

Strategy 1.3: Human Resource Mobility Programme

- Harmonising regional qualification recognition and training accreditation systems
- Harmonising work permit policies
- Ensuring greater tourist guide mobility

Goal 2: Improving and defending the tourism reputation and image of the region

Strategy 2.1: Image Communication Programme

- Formulate a regional tourism communication strategy
- Conducting a regional public relations programme
- Developing a tourism crisis communication strategy

Strategy 2.2 Sustainable Southern Africa Programme

- Promoting sustainable tourism management
- Promoting Universal Access in tourism

Goal 3: Developing Tourism in Transfrontier Conservation Areas

Strategy 3.1: TFCA Market Development Programme

- Formulating a well-researched market development strategy for TFCAs
- Expanding the TFCA marketing drive
- Developing and promoting cross-border routes and itineraries
- Supporting the development and growth of events in TFCAs

Strategy 3.2: Investment Promotion Programme

- Profiling TFCA investment opportunities
- Promoting and implementing the SADC guideline on cross-border tourism products in TFCAs

Strategy 3.3: Rural Economic Inclusion Programme

- Launching a community-based tourism initiative for TFCAs
- Promoting operational and standards guidelines for community product development

Goal 4: Improving quality of visitor experiences and satisfaction levels

Strategy 4.1: Visitor Safety and Well-being Programme

- Engaging the SADC Organ on Politics, Defence and Security to create a greater awareness of the safety and health needs of travellers among security personnel
- Initiating a tourism anti-corruption drive
- Facilitating efficient visitor insurance systems

Strategy 4.2: Quality Improvement Programme

- Promoting harmonisation of facility and services standards
- Promoting regional tour guiding standardisation and mobility
- Promoting expansion of internet connectivity in the region

Goal 5: Maximising tourism partnerships and collaboration

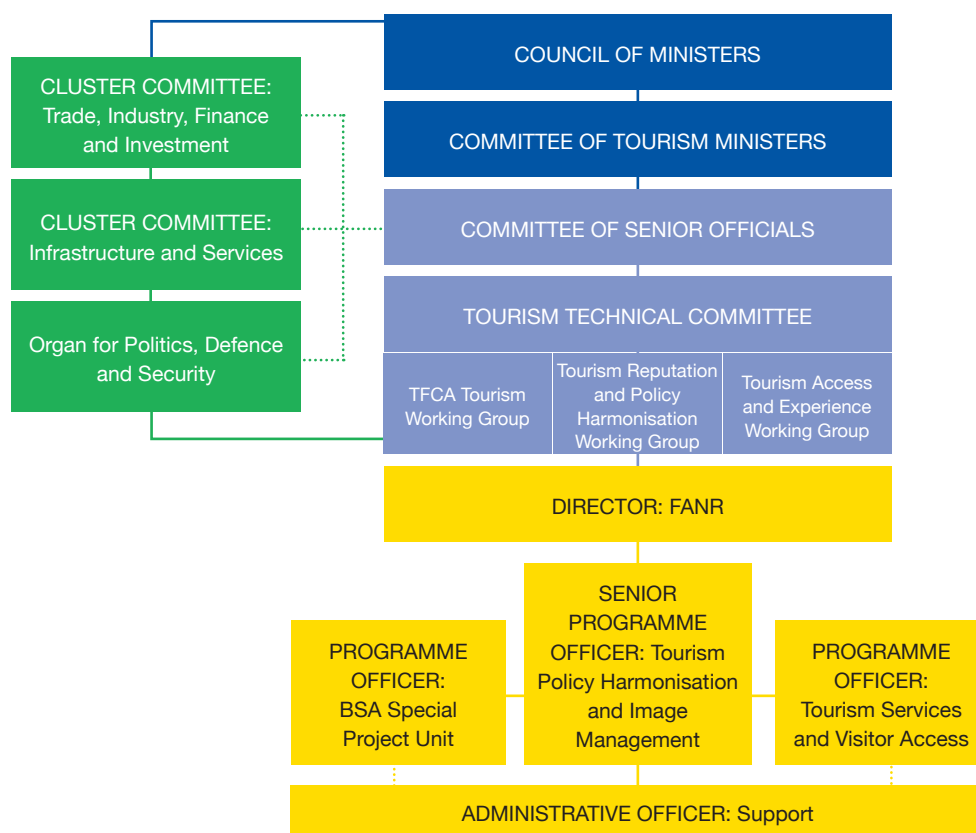
Strategy 5.1: Tourism Sector Partnerships Programme

- Establishing suitable public-private working committees to steer implementation of the SADC Tourism Programme
- Strengthening relations with relevant SADC cluster committees

Strategy 5.2: Tourism Institutional Strengthening Programme

- Formalising the SADC Tourism Institutional Structure
- Agreeing suitable “bridging” capacity for ensuring TCU functions effectively, while the structure is firmed up
- Agreeing a suitable funding approach for implementing the Tourism Programme
- Collecting and analysing tourism performance statistics and research

The following institutional structure is proposed:



The key roles of Member States, the Private Sector, NGOs and local community structures in implementing the Tourism Programme are outlined in Section 7.

1 Introduction

1.1 BACKGROUND

The SADC Ministers responsible for Tourism, in their Committee of Tourism Ministers meeting of November 2017, directed the SADC Secretariat to coordinate the process of formulating a comprehensive Tourism Programme, to serve as an overall roadmap for guiding and coordinating the development of a sustainable tourism industry in the region and to facilitate the removal of barriers to tourism development and growth.

The main objective of SADC are to achieve development, peace and security, and economic growth, to alleviate poverty, enhance the standard and quality of life of the peoples of Southern Africa, and support the socially disadvantaged through regional integration, built on democracy principles and equitable and sustainable development.

This SADC Tourism Programme serves as a roadmap to guide and coordinate the development of a sustainable tourism industry in the region and to facilitate removal of barriers to tourism development and growth.

1.2 METHODOLOGY

Various methods were applied in formulating the Tourism Programme, including:

- Studying and assessing all existing and relevant SADC tourism-related policy frameworks including protocols, plans and strategies and assessing linkages and implications of such policies and plans to the Tourism Programme. The full assessment is presented in Appendix A.
- Analysing available research and statistics, based on information provided by United Nations World Tourism Organisation (UNWTO), World Travel and Tourism Council (WTTC), SADC and other sources. Key findings are presented in Appendix B.
- Benchmarking and extracting key lessons from strategies and approaches adopted by various multilateral tourism bodies including Pacific Asia Tourism Association (PATA), Caribbean Tourism Organisation (CTO), Economic Community of West African States (ECOWAS), Indian Ocean Rim Association (IORA), European Travel Commission (ETC) and Africa Travel Association (ATA). Detailed results are presented in Appendix C.
- Consulting with a wide range of public and private sector stakeholders regarding their views of SADC tasks, responsibilities and management mechanisms for maximizing the tourism potential of the region by:
 - Conducting an online survey to assess stakeholder perceptions regarding challenges and opportunities facing the industry over the next five years. A good response rate was achieved with more than 100 industry stakeholders completing the survey, resulting in 90 usable responses, the majority of which are private tourism businesses. Detailed results are presented in Appendix D.
 - Conducting personal interviews with key opinion leaders, including Tourism Directors of various member countries.
- Facilitating a Regional Consultative Workshop attended by SADC Directors of Tourism, representatives of National Tourism Organisations (NTOs) of SADC Member States as well as selected Transfrontier Conservation Area Focal Points, towards identifying the key elements and tasks to be included in a SADC Tourism Programme. Results are presented in Appendix E.
- Revising the first draft of the document based on feedback received from a Task Group, consisting of representatives of Member State Tourism Ministries and NTOs.
- Presenting the second draft of the document to all Member State Tourism Ministries to obtain their comments based on a national consultation process involving relevant private and public sector tourism bodies in their respective countries.
- Based on the above findings and comments, drafting the Final Draft Tourism Programme.
- Validating and finalising the Programme at a validation meeting attended by representatives of all Member States, including nominated representatives of Tourism Ministries, NTOs and private sector apex organisation representatives of key member countries.
- Presenting the Final SADC Tourism Programme to the Committee of Tourism Ministers for their endorsement and to the SADC Council of Ministers for their approval.

2 Policy and Legal Framework

The following policy and institutional arrangements provide the basis upon which this Programme is formulated. This section should be read in conjunction with Appendix A, which provides a detailed analysis of policies and institutional arrangements.

2.1 SUSTAINABLE TOURISM IN INTERNATIONAL CONTEXT

According to UNWTO sustainable tourism can be defined² as:

“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”

Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Thus, sustainable tourism should:

- Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- Ensure economic viability of tourism enterprises and provide fairly distributed socio-economic benefits to all stakeholders (including stable employment, income-earning opportunities and social services), thereby contributing to economic growth and poverty alleviation.

2.1.1 UNWTO AGENDA FOR AFRICA

UNWTO, through its Commission for Africa (CAF) in 2017 launched a common action plan to serve the tourism objectives of Member States, with the following core priorities:

- To alleviate poverty through tourism projects.
- To find innovative approaches to developing tourism in the region; and
- To find and foster new partnerships and resources.

The action plan sets the following 10-point agenda for Africa, based on the Sustainable Development Goals (SDGs):

UNWTO Agenda for Africa	Implications for SADC Programme
1. Advocating the Brand Africa, SDGS 8,10,11,14,15	Managing the regional tourism brand and image
2. Promoting Travel Facilitation (Connectivity / Visa) SDGS 8,9	Facilitating easy tourist visa acquisition and cross-border immigration procedures, with a focus on TFCAs
3. Strengthening Tourism Statistics Systems SDGS 8,15,17	Guiding members states towards producing valid and reliable statistics in line with global best practice
4. Expanding of Capacity Building incl. Training Facilities SDGS 4, 8,10,17	Facilitating maximum use of training capacity and ensuring consistent and quality standards of training and qualifications
5. Promoting Innovation and Technology SDGS 8,9,17	Exchanging best practices in tourism technology application among Member States
6. Fostering Resilience (Safety + Security, Crisis Communication) SDGS 8,12,13,16	Ensuring a regional focus on tourist safety and security and ensuring effective regional crisis communication
7. Unlocking Growth through Investment Promotion by Public Private Partnerships SDGS 8,9,11,12,14,15,17	Coordinating the exchange of investment opportunities and best practice in tourism concession management, incentives, etc., with a focus on TFCAs
8. Empowering Youth and Women through Tourism SDGS 5, 8,10	Encouraging and monitoring tourism programmes aimed at empowerment of youth and women
9. Advancing the Sustainability Agenda (esp. Biodiversity) SDGS 12,13,14,15	Advancing sustainable tourism management practices in the region and supporting the implementation of such in TFCAs
10. Promoting Cultural Heritage SDGS 8,16	Advancing culture and heritage protection and cultural tourism, with a special focus on TFCAs

² UNEP and UNWTO, 2005: Making Tourism More Sustainable – A guide for policy makers

2.2 TOURISM IN CONTINENTAL CONTEXT

2.2.1 AFRICAN UNION AGENDA 2063

Agenda 2063 is a strategic framework for the socio-economic transformation of the continent over the next 50 years. It builds on, and seeks to accelerate the implementation of past and existing continental initiatives for growth and sustainable development³.

The guiding vision for Agenda 2063 is the AU Vision of “An integrated, prosperous and peaceful Africa, driven by its own citizens and representing a dynamic force in the international arena”.

The Agenda highlights seven African Aspirations, derived through a consultative process with the African Citizenry. These are:

- A Prosperous Africa, based on inclusive growth and sustainable development.
- An integrated continent, politically united, based on the ideals of Pan Africanism and the vision of Africa's Renaissance.
- An Africa of good governance, democracy, respect for human rights, justice and the rule of law.
- A peaceful and secure Africa.
- Africa with a strong cultural identity, common heritage, values and ethics.
- An Africa whose development is people driven, relying on the potential offered by people, especially its women and youth and caring for children.
- An Africa as a strong, united, resilient and influential global player and partner.

Agenda 2063 also includes an action plan with various priority Flagship Initiatives that have been approved by the AU Summit. Although tourism development is not a specific focus area of Agenda 2063, various of the flagship projects will have a direct bearing on tourism growth, especially:

- Continental Free Trade Area (a single continental market for goods and services, with free movement of business persons and investments).
- African Passport and free movement of people (a common passport document that will exempt bearers from having to obtain any visas for all 55 states in Africa).
- Single Air-Transport Network (with the aim of fully implementing the 1999 Yamoussoukro Decision).

2.2.2 EAST AFRICAN COMMUNITY AND TOURISM

The East African Community (EAC) is a regional intergovernmental organisation of 6 Partner States: the Republics of Burundi, Kenya, Rwanda, South Sudan, the United Republic of Tanzania, and the Republic of Uganda, with its headquarters in Arusha, Tanzania.

From a tourism perspective EAC's aim is to collectively promote and market the Community as a Single Tourist Destination while conserving and ensuring sustainable utilisation of wildlife and other tourist sites⁴. Some successes in this regard include:

- Since November 2008, East Africa has been marketed as a single region and the EAC Partner States have been participating in international tourism fairs.
- Uniform rates for East Africans.
- Formation of the East African Tourism and Wildlife Coordination Agency.
- Launch of EAC travel magazine, dubbed as Travel Around East Africa.
- Regional Tourism Wildlife Conference, held annually on a rotational basis within the East African region.

³ <https://au.int/agenda2063/about>

⁴ <https://www.eac.int/tourism>

2.2.3 COMMON MARKET OF EASTERN AND SOUTHERN AFRICA (COMESA)

COMESA aims to create a sustainable tourism marketing strategy, incorporate sustainable tourism elements, promote the region as single destination, develop a COMESA online portal and participate in trade fairs as a region. As a first step the COMESA Business Council (CBC) has launched a Tourism and Wildlife Heritage Handbook for promoting COMESA Member States. The book contains facts for every Member State on population, languages, religion, currency and tourist arrivals and it also highlights key wildlife and heritage attractions⁵.

2.3 TOURISM IN SADC CONTEXT

2.3.1 TOURISM WITHIN THE CONTEXT OF THE REVISED SADC REGIONAL INDICATIVE STRATEGIC DEVELOPMENT PLAN (RISDP) (2015-2020)

The RISDP is a 15-year regional integration development framework that sets priorities, policies and strategies for SADC. The plan includes strategies related to poverty eradication, regional development integration, regionally balanced and equitable development, integration into continental and global economies, sustainable development and gender equality.⁶

The Revised RISDP (2015-2020)⁷ takes into account the experiences and lessons learned during the preceding ten years and re-organises the priorities identified in the original RISDP as follows:

- a) Priority A – Industrial Development and Market Integration, including:
 - Sustainable industrial development, productive competitiveness and supply side capacity.
 - Free movement of goods and services.
 - Stability oriented macroeconomic convergence.
 - Financial market integration and monetary cooperation.
 - Intra-regional investment and foreign direct investment.
 - Deepened regional integration.
- b) Priority B – Infrastructure in support of regional integration, including:
 - Energy.
 - Transport (surface, air and intermodal).
 - Tourism.
 - ICT.
 - Meteorology.
 - Water.
- c) Priority C – Peace and security cooperation (as a pre-requisite for achieving the Regional Integration Agenda).
- d) Priority D – other special programmes of regional dimension under a) Education and Human Resource Development; b) Health, HIV and AIDS and other diseases of public health importance; c) Employment and Labour; d) Food and Nutrition Security; e) Trans-boundary Natural Resources; f) Environment; g) Statistics; h) Private Sector; i) Gender Equality; and j) Science, Technology and Innovation and Research and Development.

To take the RISDP implementation forward, the focus will be on Priority A and B. Targets under Priority D will be implemented to support achieving and fulfilling Priorities A, B as well as C.

Concerning implementation, the revised RISDP addresses tourism under the Strategic Objective “Infrastructure Support for Regional Integration” with the specific objective of “Increased competitiveness and liberalisation of regional markets for energy, ICT, transport and tourism”.

The main tourism performance indicator included in the RISDP is “% of SADC share of world market tourism”.

Immediate Outputs specifically related to tourism include:

- Platform for sharing best practices on inclusive business partnerships established and operational.
- Regional Private Sector Partnership and Collaboration Strategy developed and implemented.
- Regional Strategy on Inclusive Business developed and implemented.
- Statistical capacity building, including training for harmonised regional statistics, promoted and implemented.
- Harmonised Tourism laws implemented in at least 5 Member States.
- UNIVISA pilot stage implemented in six Member States, five of which are from the Kavango-Zambezi Transfrontier Conservation Area (KAZA-TFCA).
- Tripartite Joint Competition Authority operationalized for overseeing the implementation of the Yamoussoukro Decision on the Liberalisation of Access to the Air Transport Markets.
- Natural resources management interventions domesticated under RAP, Protocols on Fisheries, Forestry and Wildlife Conservation and Law Enforcement.

⁵ <http://comesabusinesscouncil.org/Handbook/index.html>

⁶ SADC (2001) Summary of the Regional Indicative Strategic Development Plan

⁷ SADC (2015) Approved revised Regional Indicative Strategic Development Plan 2015-2020

- Programmes on Fisheries, Forestry and Wildlife and Trans-Frontier Conservation Areas (TFCAs) implemented.
- SADC Best Practice Guidelines for TFCAs developed.
- Regional Human Resource Skills Development Plans developed for key sectors in priority A, B and C and other areas towards social and economic integration and cooperation.
- SADC Labour Migration Policy Framework approved and implemented within the broad context of facilitation of movement of persons

2.3.2 SADC PROTOCOL ON THE DEVELOPMENT OF TOURISM, 1998⁸

Tourism functions and arrangements in SADC came into effect through the SADC Protocol on the Development of Tourism, formulated and signed into effect in 1998 and amended in 2009. The institutional arrangements and tourism implementation status in SADC have gone through various transformation processes and stages since, as outlined below. The Protocol sets out SADC's policy statement, objectives and institutional arrangements for developing tourism in the region. Specific objectives included:

1. To use tourism as a vehicle for sustainable social and economic development.
2. To ensure equitable, balanced and complimentary development of the tourism industry region-wide.
3. To optimise resource usage and increase competitive advantage in the region through collective efforts.
4. To ensure involvement of small and micro-enterprises, local communities, women and youth.
5. To contribute towards human resource development in the region through job creation and skills development.
6. To create a favourable investment climate in the region.
7. To improve quality, competitiveness and standards of service.
8. To improve standards of tourist safety and security in territories of Member States and make provision for disabled, handicapped and senior citizens in their countries.
9. To aggressively promote the region as a single, but multi-faceted tourism destination capitalising on its common strengths and highlighting individual Member States' unique tourist attractions.
10. To facilitate intra-regional travel for the development of tourism through easing of removal of travel and visa restrictions and harmonisation of immigration procedures.
11. To improve tourism services and infrastructure.

The following specific functional focus areas are encapsulated in the Protocol:

- Travel facilitation: visas, immigration processes, transport access.
- Tourism training and education: Harmonise & coordinate Programme for Tourism in schools, training, training standards.
- Marketing & promotion: In accordance with the RETOSA Charter (1997), RETOSA shall be the marketing and promotional arm of SADC and is mandated to promote the region.
- Tourism research & statistics: Harmonise methodologies and systems for data collection, and exchange.
- Service standards: Regional control mechanism, harmonise systems for registration, accreditation, grading.
- Transportation: Enhance overall quality of tourism transport, develop appropriate tourism signage in respective countries.
- Environmentally sustainable tourism: Pursue sound, sustainable policies on utilisation and management of natural and cultural resources.
- Investment incentives & development: Use respective laws to make the region an attractive investment location, promote growth and development of private sector initiatives, ensure local communities are involved in and benefit from tourism, establish a financial mechanism for local participation, give priority to investment in sustainable development of cross border nature and culture development.

The institutional mechanism for the implementation of the Protocol comprise of:

- The Summit.
- The Council of SADC Ministers.
- The Committee of Tourism Ministers (COM).
- The Committee of Senior Officials (COSO).
- Tourism Coordinating Unit.
- The Regional Tourism Organization of Southern Africa (RETOSA).

See Appendix A for specific functions allocated to the various organs outlined above.

2.3.3 AMENDMENT TO THE SADC PROTOCOL ON THE DEVELOPMENT OF TOURISM, 2009⁹

In the original Tourism Protocol, RETOSA was established to serve mainly as the promotional and marketing arm of SADC's tourism sector and was governed by a Charter that came into force in 1997¹⁰.

In 2009, following the amendment of institutional arrangements of the Protocol RETOSA assumed policy coordination functions, in addition to marketing, working closely with the tourism function at the SADC Secretariat. The concept of a Tourism Coordinating

⁸ Southern African Development Community, (1998): Protocol on the development of tourism, SADC

Unit, as specified in the original Protocol fell away and administrative coordinating functions reverted to the SADC Secretariat, with RETOSA assuming all implementing functions. See Appendix A for more details regarding the amended structure and functions.

2.3.4 RESTRUCTURING OF SADC TOURISM, 2015 ONWARDS

In July 2016, the Committee of Tourism Ministers approved the organizational transformation of RETOSA to become a private sector-driven regional marketing entity leaving policy coordination functions to SADC Secretariat. COM directed SADC Secretariat to take advantage of the on-going restructuring process to once again activate the Tourism Coordination Unit (TCU) within the SADC Secretariat.

The role of the TCU would be to ensure effective coordination and the development, harmonisation and implementation of tourism policy, legislation and related issues.

In March 2017 Council of Ministers approved the new SADC tourism organizational structure that includes the TCU under the Directorate of Food, Agriculture and Natural Resources (FANR). The TCU has two positions, namely Senior Programme Officer-Tourism and Programme Officer-Policy and Market Development. However, both positions are categorized as flexi and were vacant at the time of formulating this document.

In November 2017 the Committee of Tourism Ministers:

- Urged Member States to consider seconding officers to SADC Secretariat to occupy the position two positions.
- Recommended to Council to consider changing the current positions in the Tourism Coordinating Unit (TCU) from flexi into fully funded positions to ensure sustainability.
- Directed SADC Secretariat in collaboration with Member States to develop a SADC Tourism Programme; and
- Directed the Secretariat to mobilize resources to support the implementation of SADC Tourism Programme once developed.

2.3.5 WINDING UP OF RETOSA

In March 2018, the Chairperson of the RETOSA Board informed SADC Secretariat through the SADC Chair, that RETOSA was facing serious financial challenges. Efforts were made to address the challenges under the guidance of Member State South Africa in her capacity as SADC Chair. On 8 May 2018 an Extra-ordinary Meeting of the RETOSA Board recommended that due process be followed to close RETOSA.

In June 2018, an Extra-ordinary Meeting of the Committee of Tourism Ministers recommended that the process of winding up RETOSA be initiated with immediate effect in order to mitigate adverse exposure of not meeting contractual obligations.

In response, the Council of Ministers meeting of 13-14 August 2018, in their Decision 29:

- i) Urged Member States to pay their outstanding contributions, in order to enable RETOSA to fulfil its contractual obligations including paying for staff salaries;
- ii) Approved the dissolution of the Board of Directors and, to initiate the process of winding-up RETOSA with immediate effect, in line with provisions of the Charter establishing RETOSA; and
- iii) Directed the Secretariat to develop a feasible mechanism that will ensure that the objectives of the SADC Tourism Programme are fulfilled and submit a report to Council at its meeting of August 2019.

2.3.6 RELATIONSHIP WITH OTHER SADC SECTORS

During the August 2018 meeting, Council also noted the need for close collaboration amongst the Ministers responsible for the Tourism Environment and Natural Resources and the Organ on Politics, Defence and Security Cooperation in order to facilitate:

- Cross-sectorial dialogues with immigration, customs and police, among others to devise strategies for removing the obstacles that hinder cross-border tourism development and cross-border travel by tourists such as further implementation of tourist access facilities and tourism Univisa programme; and
- Full and effective involvement of the Ministries responsible for Tourism as well as the private sector in the anti-poaching efforts in the region, especially with regard to communication and public relations related to poaching.

During the above-mentioned meeting Council approved the inclusion of Ministers responsible for Tourism in the Joint Committee of Ministers of Environment and Natural Resources and of the Organ in Politics, Defence and Security Cooperation as approved by the Council meeting of March 2017 at Ezulwini, Eswatini to oversee and monitor the implementation of the SADC LEAP Strategy.

⁹ Southern African Development Community, (2009): Agreement Amending the Protocol on the Development of Tourism in the Southern Africa Development Community

¹⁰ Southern Africa Development Community, (1998): Charter of the regional Tourism Organisation of Southern Africa (RETOSA)

2.4 SADC POLICIES AND PROGRAMMES THAT AFFECT THE SADC TOURISM SECTOR

The following documents, frameworks and policies are of relevance to the SADC Tourism Programme and were considered in formulating this document.

2.4.1 SADC POLICIES, PLANS AND TREATIES¹¹

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

- **SADC Protocol on Wildlife Conservation and Law Enforcement, 1999¹²**: The Protocol does not specifically make reference to tourism, but objectives include to, “promote conservation of shared wildlife resources through the establishment of Transfrontier Conservation Areas” (Article 4, 2(f)). The protocol states that Parties should endeavour to harmonize national legal instruments standardizing, “economic and social incentives for the conservation and sustainable use of wildlife” (Article 6, 2[g]), which could be applied to cross-border tourism products.
- **Revised Protocol on Shared Water Courses, 2002¹³**: While this protocol does not specifically mention tourism, its objectives include “advancing the sustainable, equitable and reasonable utilisation of the shared watercourses” (Article 2[b]). This provides a framework for cross-border water-based tourism, such as canoeing and rafting.
- **Protocol on Trade in Services, 2012¹⁴**: Objectives of the protocol include to “progressively liberalise intra-regional trade in services on the basis of equity, balance and mutual benefit”, coupled with the promotion of “sustainable economic growth and development, thereby raising the standard and quality of life of the people of southern Africa” (Article 2, [1 & 2]). The mutual recognition article specifies that necessary steps should be taken for negotiating an agreement, “providing for the mutual recognition of requirements, qualifications, licenses and other regulations . . . for the authorization, licensing, operation and certification of service suppliers and, in particular, professional services” (Article 7[1]). In relation to market access, the protocol also indicates that no State party shall adopt or maintain, “limitations on the number of service suppliers”, or “limitations on the total number of natural persons that may be employed in a particular service sector” (Article 14 [a & d]). Therefore, this protocol makes provision to address the issue of licenses and permits for tourism companies and their employees crossing international borders to facilitate cross-border tourism.

2.4.2 SADC TRANSFRONTIER CONSERVATION AREAS (TFCA) INITIATIVE

Currently there are 18 TFCAs in SADC, which are at various stages of development (see table in Appendix A and Figure 1 below). The TFCAs are of major importance to future tourism growth in SADC, since they envisage the creation of large conservation areas that, once functional will offer visitors a huge diversity of high-quality nature experiences, in both terrestrial and marine environments and including a range of World Heritage Sites. In addition, the development of tourism will provide communities in and adjacent to these areas various tourism-induced livelihood opportunities.

The following plans and initiatives have been undertaken to give effect to the TFCA initiative:

- **SADC Regional Infrastructure Development Master Plan, Tourism (TFCAs) Sector Plan (2012)¹⁵**: The tourism sector chapter outlines an integrated plan for the sustainable development of TFCAs within the SADC region for the period to 2027. The sector plan identifies various priority projects for implementation during the plan period, divided into three clusters, namely
 - i) Physical Infrastructural projects;
 - ii) Policy Harmonisation and Strategy development projects; and
 - iii) Tourism Product projects. The priority projects are outlined in Appendix A.
- **SADC TFCA Programme, 2013¹⁶**: The SADC TFCA Programme has 7 key components with specific objectives, activities and outputs to be carried out at the regional, sub-regional and national levels. These include:
 - Component 1: Advocacy and Policy Harmonisation across TFCAs in the region.
 - Component 2: Enhancement of financing mechanisms for TFCAs, by initiating and supporting financial support from ICPs or through the establishment of a regional fund specifically for the development of TFCAs in the SADC region.
 - Component 3: Capacity building for TFCA stakeholders.
 - Component 4: Establishment of data and knowledge management systems.
 - Component 5: Enhancement of local livelihoods, focusing on demonstrating TFCA benefits to local communities, increased private and public investments in cross border infrastructure and tourism projects and facilitating cross border access to local and regional markets that can further increase incomes. Key activities include, “To develop a portfolio of transboundary infrastructure, trade and tourism projects within TFCAs.” and “Convene investor conferences to encourage

¹¹ Southern African Development Community (2019): SADC TFCA cross-border tourism product, Situational Analysis Report, Draft – Unpublished

¹² Southern African Development Community (SADC) (1999) SADC Protocol on Wildlife Conservation and Law Enforcement

¹³ Southern African Development Community (SADC) (2002) Revised protocol on shared watercourses in the Southern African Development Community

¹⁴ Southern African Development Community (SADC) (2012)

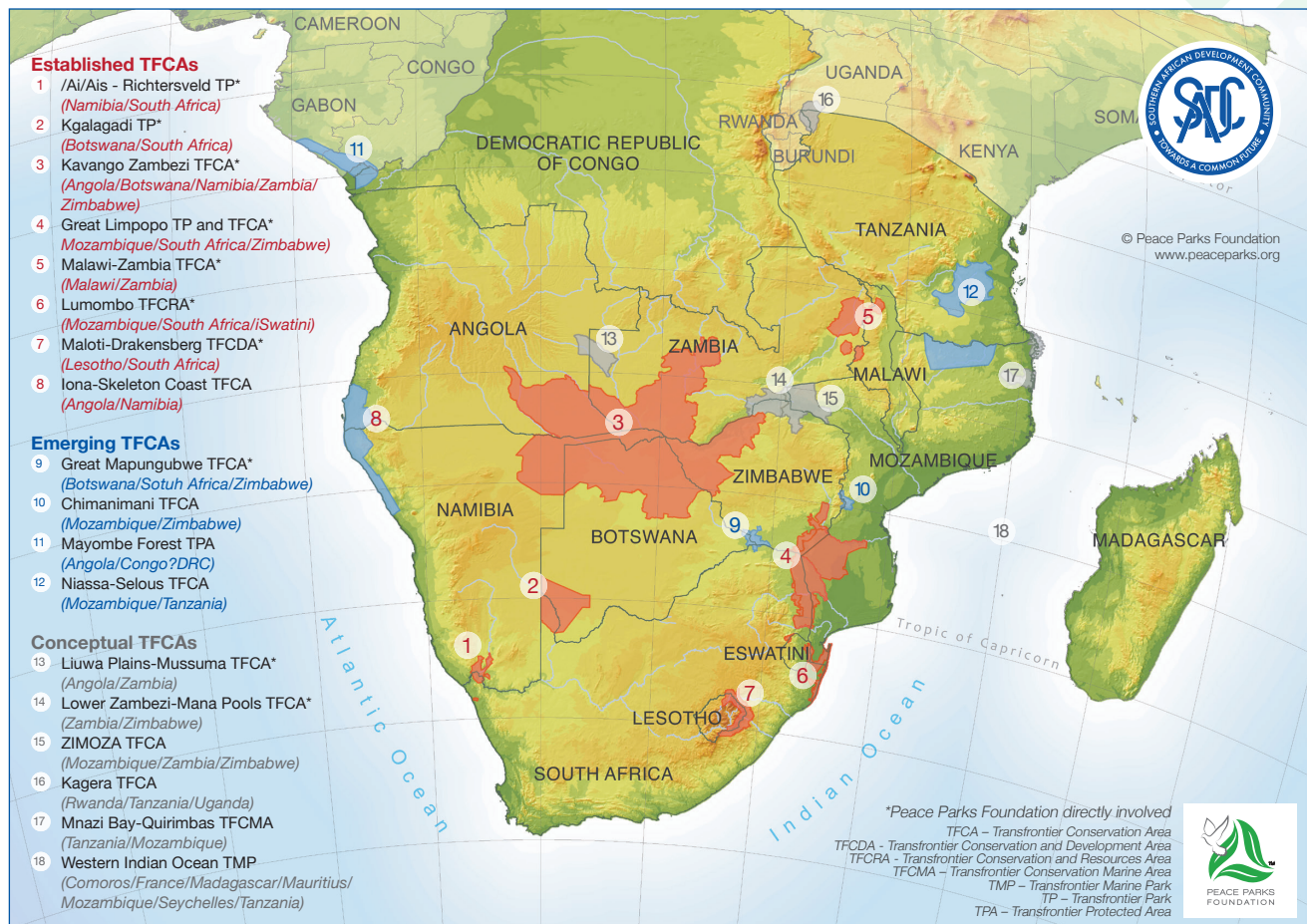
¹⁵ Southern African Development Community, (2012): Regional Infrastructure Development Master Plan, Tourism (TFCAs) Sector Plan

¹⁶ Southern African Development Community, (2013): SADC Programme for Transfrontier Conservation Areas, SADC Secretariat, Gaborone, October 2013

investment in these transboundary projects.”

- Component 6: Reducing vulnerability of ecosystems and people to the effects of climate change.
- Component 7: Development of TFCAs into marketable regional tourism products. Key activities include to “Develop and market regional flagship cross-border tourism products”, and to “Develop guidelines to facilitate equitable joint venture partnerships between local communities and the private sector.”

Fig. 1: Status of TFCAs in SADC (2019)



The SADC TFCA Programme will be implemented at three levels: (i) the SADC Secretariat; (ii) the national Member State level; and (iii) the TFCA level. At the SADC Secretariat level, the FANR Directorate will be responsible for the overall policy guidance, through various SADC protocols, and assist in the harmonisation of natural resources management and tourism development policies and legislation. Staffing consists of a TFCA Programme Officer (Head of TFCA Unit in FANR) and a TFCA Assistant Programme Officer: responsible for technical and administrative support.

Boundless Southern Africa (2008 - current): The Boundless Southern Africa brand was developed as an umbrella brand for marketing TFCAs as tourist and investment destinations in a consolidated and coordinated manner. The brand was endorsed by Ministers of nine participating countries and was launched in May 2008 during the build-up to the 2010 Fédération Internationale de Football Association (FIFA) World Cup hosted in South Africa, which was positioned as an event that belonged to Southern Africa in its entirety. The Boundless strategy aims to increase the tourism potential of southern Africa by positioning TFCAs as preferred tourist and investment destinations in the region, through consolidating multi-national products into a comprehensive and marketable regional tourism product.

To give effect to concept of Boundless Southern Africa a TFCA Coordinating Unit was established within the South African Department of Environmental Affairs (DEA) in 2007. The strategy included a two-phased approach, namely:

Phase I: The Boundless Southern Africa brand to focus marketing efforts on 7 TFCAs, these being: /Ai /Ais-Richtersveld, Kgalagadi, Kavango-Zambezi, Greater-Mapungubwe, Great Limpopo, Lubombo and Maloti-Drakensberg.

Phase II: At the Joint meeting of SADC Ministers responsible for Environment and Natural Resources, Fisheries and Aquaculture and, Tourism held 23-24 November 2017, Ministers approved the implementation of Phase II of the TFCA Development Strategy, which would see the Boundless Southern Africa initiative cover all 18 TFCAs throughout SADC. Phase II will also be used to ensure the development and sustainability of all TFCAs across the region based on the following lessons learned: i) the need to coordinate TFCA destination marketing efforts better and to use one common brand; ii) the need to develop more cross-border tourism itineraries and routes through more TFCAs; and iii) the need to support work towards removing obstacles that hinder cross-border tourism development in TFCA.

Despite limited manpower and resources at its disposal BSA has initiated and supported various successful pilot tourism marketing initiatives, including press trips, promotion of bird-watching tourism and supporting the staging and development of a variety of outdoor adventure and sport events, including mountain biking, hiking, adventure racing and golf events in various TFCAs. The South African Department of Environmental Affairs has hosted the BSA initiative since its inception and there is a need to consult and agree on future hosting arrangements within SADC.

At the time of formulating this Programme document the status of Boundless Southern Africa was unclear. During the Joint Ministers meeting of November 2017, Ministers:

- i) Approved the implementation of Phase II of the TFCA Development Strategy;
- ii) Directed the Secretariat to investigate the feasibility of and modalities of the proposal to incorporate the Boundless Southern Africa brand in the RETOSA Strategy and the relocation of the Boundless Southern Africa Secretariat in the newly transformed RETOSA;
- iii) Directed the Secretariat to mobilize resources to support the implementation of the TFCA Development Strategy;
- iv) Directed the Secretariat and RETOSA to incorporate the marketing of TFCAs as regional tourism products in the RETOSA Charter and Memorandum of Understanding between RETOSA and SADC Secretariat.

However, the decision to incorporate BSA in RETOSA is not feasible, given the decision of the SADC Council of Ministers to wind up RETOSA with immediate effect, as cited above.

2.5 IMPLICATIONS OF CURRENT POLICIES AND PROGRAMMES FOR THE SADC TOURISM PROGRAMME

It is clear from the analysis above that sufficient planning and policy frameworks exist to guide the future development of regional tourism. While the various SADC policies provide a strong framework for cross-border tourism, Spenceley (2018)¹⁷ found that stakeholders were concerned about the lack of harmonization of statutes, and that not all protocols had been ratified at the country level. Stakeholders had also called for improved feedback on the impacts of policies, including capturing lessons learned from policy decisions. For example, while there are provisions to promote private investment, there is also a need to make available more opportunities to private sector partners.

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

The various policies and Programmes captured above hold the following implications, among others, for the SADC Tourism Programme.

Table 1: Summary of regional tourism-related policies, plans and programmes and their implications for the SADC Tourism Programme

Policy/plan/Programme	Implications
1. UNWTO Agenda for Africa	<ul style="list-style-type: none"> • There is potential for greater international-regional synergy and collaboration: The UNWTO Agenda for Africa has a good fit with the SADC Tourism Programme and where possible synergies and collaboration should be sought with Programmes of the UNWTO Commission for Africa.
2. African Union Agenda 2063	<ul style="list-style-type: none"> • Various flagship projects will support tourism in SADC: Successfully implementing projects like establishing an African Free Trade Area, an African Passport and free movement of people and a Single Air-Transport Network will address serious challenges relating to tourism growth in SADC.
3. African Union Commission (AUC) Specialised Technical Committee (STC) on Tourism	<ul style="list-style-type: none"> • Explore cooperation and partnerships: This Continental Committee of Ministers Responsible for Tourism at AU level will launch initiatives that may impact across the African continent, including Southern Africa. As such, programme synergies should be sought with the STC on Tourism.
4. Other SADC sectors and related policies, plans and treaties	<ul style="list-style-type: none"> • Inter-sectorial collaboration in SADC should be pursued: The decision by the Council of Ministers to include the Ministers responsible for Tourism in the Joint Committee of Ministers of Environment and Natural Resources and of the Organ in Politics, Defence and Security Cooperation sets a benchmark for inter-sectorial collaboration in SADC. SADC should encourage and facilitate such interaction and collaboration between tourism and other sectors, to ensure implementation of this Programme. • SADC tourism should ensure the inclusion of tourism requirements in other SADC policies and protocols, including the RISDP, protocols on Trade, Wildlife Conservation and others.

¹⁷ Southern African Development Community (2019): SADC TFCA cross-border tourism product, Situational Analysis Report, Draft – Unpublished

5. SADC Protocol on Tourism (and Amended 2009)	<ul style="list-style-type: none"> • Protocol provides an adequate functional framework for SADC Tourism: The protocol sets a broad and encompassing framework within which tourism marketing and development can be executed. • The “agency” institutional model has not succeeded: The move of establishing RETOSA as a public-private sector implementing agency and giving it greater implementation powers in 2009 did not succeed, despite attempts to restructure and re-invigorate RETOSA. Member States clearly did not see adequate benefits emerging from this arrangement and the majority of states were not able or prepared to honour their financial commitments to RETOSA. • Need to amend the Protocol on Tourism: The Protocol provides for RETOSA as implementing agency for tourism; and the amended Protocol (2009) abolishes the Tourism Coordinating Unit (TCU) and allocates policy formulation, marketing and development functions to RETOSA. Given the Council of Minister’s decision in 2018 to wind up RETOSA and to re-establish the TCU as SADC tourism vehicle, the Protocol will have to be amended accordingly.
6. Restructuring of SADC Tourism (2015 Onwards)	<ul style="list-style-type: none"> • SADC tourism role and scope to be redefined: The tourism role, functions and capacity of SADC need to be clearly defined and alternative institutional options need to be considered. • Permanent staffing of the tourism unit is essential: Effective staffing of the Tourism Coordinating Unit is essential for executing the Programme. The current (not yet operational) approach of Member States seconding staff to the Unit is not an optimal solution as it is a temporary arrangement that will reduce consistent delivery of the Tourism Programme and diverts from sound recruitment practices to ensure the best candidates are recruited for the job.
7. Winding up of RETOSA	<ul style="list-style-type: none"> • Need to speedily wind up RETOSA: Given the Council of Ministers’ decision to wind up RETOSA, the process should be concluded as soon as possible to avoid continued uncertainty and impasse in implementing the Programme. • SADC should consider options for replacing the essential roles and functions of RETOSA and build on the work it has done¹⁸: RETOSA acted as regional tourism marketing, research and policy advisory agency for 20 years before the decision in 2018 to abolish it. During its tenure the organisation developed a range of tourism development and marketing guidelines and programmes and the TCU should continue applying and improving on these.
8. Transfrontier Conservation Areas (TFCA) initiative	<ul style="list-style-type: none"> • SADC Tourism Programme should have a special focus on TFCAs: The TFCA initiative provides a tangible and highly relevant case for tourism development through regional collaboration and synergies in destination management. The SADC Tourism Programme should support the TFCA initiative in all possible respects.
9. SADC Regional Infrastructure Development Master Plan, Tourism (TFCAs) Sector Plan (2012)	<ul style="list-style-type: none"> • SADC Tourism Programme to draw on the TFCA master plan where feasible: The Master Plan contains an important but selective portfolio of infrastructural and technical investment proposals for unlocking the potential of various TFCAs. While the feasibility of a regionally funded infrastructure Programme is still to be proven, the SADC Tourism Programme should seek to adopt relevant Master Plan proposals, where possible and relevant.
10. SADC TFCA Programme, 2013	<ul style="list-style-type: none"> • SADC Tourism Programme to establish a functional partnership with TFCA Programme: The TFCA Programme (especially Components 5 and 7) bears major relevance to the Tourism Programme and every effort should be made to establish functional partnership between the SADC Tourism Programme and the TFCA Programme, to maximize resources and avoid overlaps and duplication of effort.
11. Boundless Southern Africa initiative (2008 - current)	<ul style="list-style-type: none"> • The practical implementation projects and initiatives achieved by BSA since its inception should be sustained and further expanded: Given the experience gained in implementing these practical cross-border initiatives in association with Park Managers Committees and various agencies in Member States, BSA could play an important role as a marketing and investment promotion brand for SADC TFCAs.
	<ul style="list-style-type: none"> • A credible and sustainable “home” should be arranged for the BSA initiative: BSA has been operating as a small unit within the South African Department of Environmental Affairs. BSA has no legal standing and operates under the administrative ambit of the South African government. While this arrangement has served a good purpose it is not suitable should BSA be seen to play an expanded role within SADC, as regional promotional brand and marketing vehicle on behalf of the entire region and all SADC Member States.

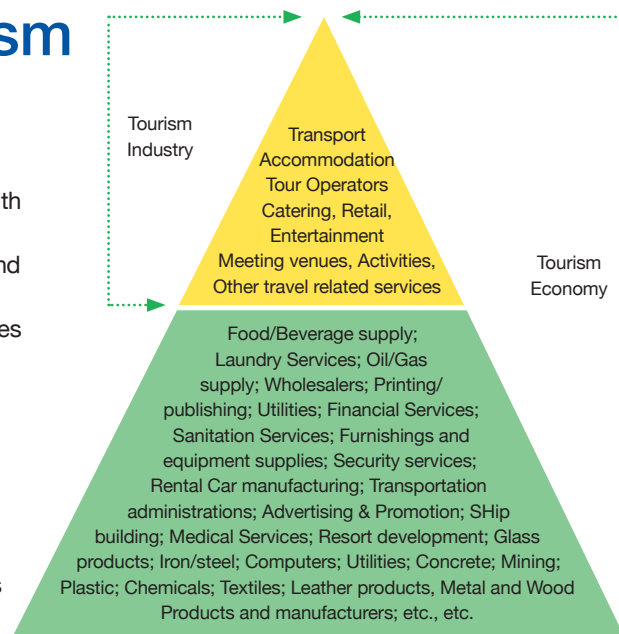
¹⁸ An inventory of work done by RETOSA over the years should be compiled

3 Current State of Tourism

3.1 IMPORTANCE OF THE TOURISM SECTOR IN SADC

Tourism is a cornerstone of the regional economy, together with agriculture, mining and services. SADC recognizes that:

- Investment in tourism could reap substantial local economic and social benefits.
- Tourism expenditure filters through regional and local economies and benefits not only direct tourism providers but also many other related services, suppliers and the citizens at large.
- A growing tourism industry offers business opportunities for large businesses as well as Small, Medium and Micro Enterprises (SMMEs) such as tour guides, restaurateurs, accommodation providers, activity providers and many more.
- Tourism is labour intensive and creates employment at all skills levels, from unskilled to management level.
- Travel for business and leisure tourism between SADC Member States will maximise the collective tourism resources of the region.



As per Table 3 below tourism adds major value to the global and regional economies and is a labour intensive industry. The sector directly contributes around 2.8% of the total SADC GDP and when indirect and induced economic impacts are added, its contribution is more than 8% of SADC GDP. The sector directly sustains around 2.5 million jobs in the region and in total more than 6.3 million jobs (direct, indirect and induced) depend upon tourism. Tourism is arguably the economic sector with the best growth and employment potential in the region.

Table 2: Economic impact of tourism in the World and in SADC area (2017)¹⁹

	World	SADC
GDP	<ul style="list-style-type: none"> • Direct: US\$2.5 trillion, 3.2% of global GDP • Total²⁰: US\$ 7.6 trillion, 10.2% of total global GDP 	<ul style="list-style-type: none"> • Direct: USD19.4 billion, 2.8% of regional GDP • Total: USD56.3 billion, 8.2% of total regional GDP
Employment	<ul style="list-style-type: none"> • Direct: 118 million jobs, 3.8% of total global jobs • Total: 313 million jobs, 9.9% of all global jobs, equivalent to 1 in every 10 jobs 	<ul style="list-style-type: none"> • Direct: 2.5 million jobs, 2.4% of total regional jobs • Total: 6.3 million jobs, 6.1% of all regional jobs
Visitor Exports ²¹	<ul style="list-style-type: none"> • US\$1.5 trillion, 6.5% of total global exports 	<ul style="list-style-type: none"> • USD18.3bn, 9.1% of total regional exports

Source: WTTC, 2018

3.2 GLOBAL TOURISM TRENDS

According to the United Nations World Tourism organisation (UNWTO) global tourism has grown consistently over the past two decades and the only downswing in global tourist arrivals occurred in 2008/9, during the height of the global economic crisis. During 2017 global tourism grew exceptionally well, with tourist arrivals growing at almost 7% to 1,326 million and tourism receipts growing at almost 5% to US\$1,340 billion.

Tourism to Africa grew in 2017 at levels higher than the global average, with tourist arrivals growing at almost 9% to 63 million and tourist receipts growing at almost 8% to US\$37 billion. The good growth continued during the first six months of 2018, and UNWTO has forecasted international tourist arrivals to increase at around 4.9% for the year 2018 (to be confirmed).

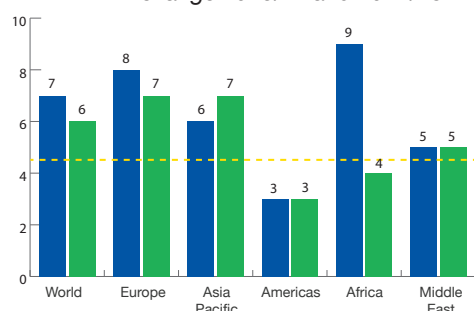
The international tourism environment is fast changing and to compete with leading tourism regions in the world, Member States in SADC should capitalize on and respond to travel trends that are shaping tourism at global level. Fortunately, the magnificent

¹⁹ World Travel and Tourism Council, (2018): Travel & Tourism Economic Impact 2018, SADC

²⁰ "Total" GDP and Employment Impacts of Travel & Tourism include direct, indirect, and induced impacts.

²¹ Refers to expenditure by international visitors.

Fig. 2: International tourist arrivals, % change 2016/17 and 2017/18



region has a rich diversity of natural and cultural assets and features that speak to the trends highlighted below. The region is able to offer sustainable, authentic and varied travel experiences and destination managers should develop and manage these in accordance with market demands.

The following are some key trends, as highlighted by UNWTO (www.unwto.org), Skift (www.skift.com), Intrepid Travel (www.intrepidtravel.com) and other leading tourism trend advisors.

Source: UNWTO, 2018

Table 3: Global tourism trends and implications for the SADC Tourism Programme

Global trend	Implications for SADC Tourism
<p>Sustainability goes mainstream Environmental awareness is increasing exponentially. Global warming, environmental threats and destruction are in travellers' faces. Global Sustainable Development Goals increasingly steer tourism objectives.</p>	The majority of SADC Member States rely on their authentic and well-conserved natural and cultural resources as main tourism draw cards and the TFCA initiative is a globally unique conservation concept. All efforts should be made to advance and promote sustainable tourism management in the region.
<p>Time as a travel currency Leisure time is increasingly precious with "money-rich, time-poor" travellers demanding transparency and ease of travel planning, booking transport, removal of borders restrictions, etc.</p>	Ease and seamlessness of immigration and visa processes (e.g. as per EU Schengen Visa), air access, tourist public transport, traffic systems, parking, pedestrian movement and access to ICT should be continuously improved.
<p>Mobile technology rules travel The connected traveller influences perceptions. Visitors use mobile phones at all stages of the travel journey. Connected travellers could be our best or worst marketers and an attractive product or experience will promote or demote itself.</p>	Visitor mobility should be continuously enhanced and visitors should be able to connect to the internet to explore more and share their Southern Africa experiences. SADC Tourism Programme should facilitate easy and affordable Internet connectivity, at least at main tourist sites in the region.
<p>Crisis is the new norm We live in a world of fear and distrust. Visitor safety, security and health are paramount in travel planning and the ability to manage crises will become increasingly important.</p>	Collaboration and coordination among Member State tourism and security authorities should be strengthened and a crisis communication strategy set in action at regional level.
<p>Travel as a mechanism for family and multi-generational bonding Family travel and intergenerational travel is increasing. Travel is increasingly regarded as an opportunity to bond in a fast-paced world. Older travellers have special needs.</p>	Opportunities for family travel should be promoted and development of children's activities and experiences supported. Universal Access should be further promoted and enhanced.
<p>The Millennial travel bug Millennial travel is growing throughout the world, but is especially fast growing in emerging Asian markets. Millennials live it now, share it now and look for instant gratification.</p>	Special value offers should be developed for younger, intrepid explorers who are keen to engage hands-on with nature, cultural traditions and adventure activities. The creative industries and safe nightlife zones should be enhanced.
<p>Growth of the shared economy. Technological disruptions in accommodation, transport, dining and other sectors are common and destinations that embrace these have competitive advantage, but it comes with associated challenges.</p>	SADC Member States should embrace the shared economy as mechanisms for SME advancement and improved market access. SADC should develop guidelines for ensuring consumer protection and competitive order in the industry, without discouraging growth.
<p>Personalisation and authenticity valued Travel has become a commodity – people have been everywhere and "specialness" is a relative concept. Special attention, authentic experiences and tailored service offering are increasingly expected and valued.</p>	The multi-cultural society in Southern Africa offers major opportunity for personalised, interactive travel experiences. Cultural tourism and safe interactions with the region's diverse cultures should be encouraged.
<p>Increasingly segmented markets As people become more travelled the search for experiences that suit their specific tastes and interests increases – experiences need to be finely tuned in line with segment needs.</p>	Member State tourism authorities should be well versed in understanding the needs of existing and emerging market segments, communicating these to the industry and incorporating these in national and regional development policies.
<p>Geographic market shifts. Markets in Asia and China are increasingly maturing and becoming sophisticated in travel needs; Russia has grown well over recent years.</p>	Member State tourism marketing authorities should further strengthen and enhance their marketing relationships and partnerships in such growth markets. SADC should provide research and market insights for equipping Member States to capitalise on market shifts.

3.3 RECENT PERFORMANCE

The following section provides a snapshot of the scale and performance of tourism in SADC and its member countries.²²⁺²³

3.3.1 TOURISM MARKET SHARES AND GROWTH

Market shares of Member States: Figure 3 below provides a glance at the tourism market shares of the various SADC Member States, in terms of both tourist arrivals and receipts. The figure indicates that the top 7 countries (RSA, Zimbabwe, Botswana, Mozambique, Mauritius, Namibia and Tanzania) receive more than 78% of all international tourist arrivals to SADC and almost 85% of tourism receipt.

Three countries, namely RSA, Mauritius and Tanzania receive 70% of all tourist expenditure, while they receive only 50% of arrivals. The Indian Ocean Islands receive only around 8% of arrivals to the region, while their share of receipts is more than double that.

It is clear from this analysis that major tourism inequalities exist within SADC, particularly in respect of economic benefits derived from tourism. The majority of Member States on mainland Africa suffer from small market shares and low tourism economic yields.

Growth rate: The compound average annual growth rate of tourist arrivals in SADC over the period 2005 to 2016 was 4.2% per annum, slightly above the global average growth rate of 4% per annum and below the continental African growth rate of 4.7% per annum. In countries where tourist arrivals grew from a low base, e.g. DRC, Mozambique and Angola achieves particularly high growth in arrivals over the period. Arrivals to more mature destinations like South Africa and Botswana grew at modest levels of between 1% and 3% per annum over the period.

Receipts per citizen: SADC countries, on average receive US\$51 international tourist expenditure per capita population per annum, almost double the average per capita tourism revenue for Africa (US\$27).

Tourism revenues per capita population vary vastly among Member States. Per capita revenues are particularly high in the island states of Seychelles and Mauritius, with their combination of high value tourism and limited population sizes, with Seychelles receiving US\$4,358 per resident and Mauritius receiving US\$1,245 per resident. Tourism is also a substantial per capita income earner for Botswana (US\$494), RSA

Fig. 3: Share of SADC Tourism Arrivals and Receipts, 2016

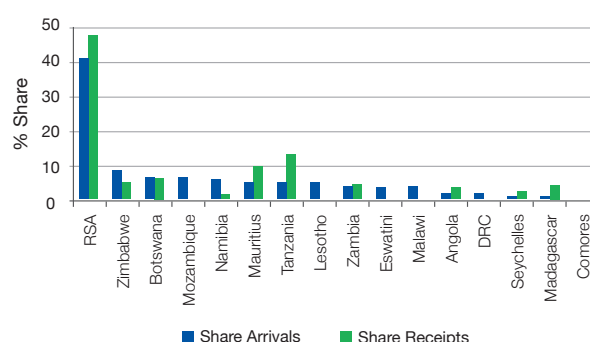


Fig. 4: Average Annual Growth Rate of Tourism Arrivals, 2005-2016

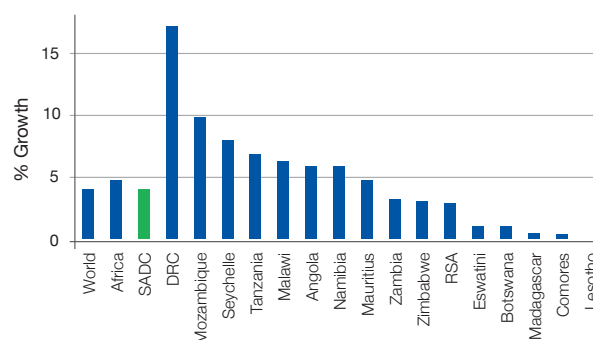
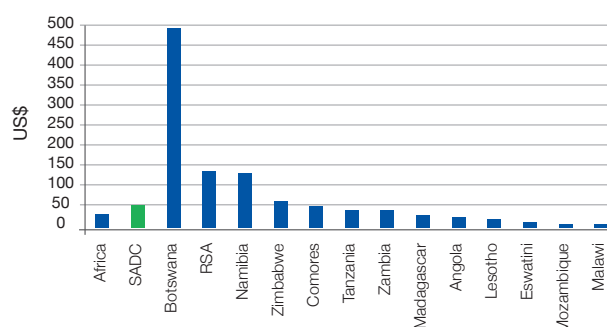


Fig. 5: Tourism Receipts Per Capita Population (Ex Seychelles/Mauritius)

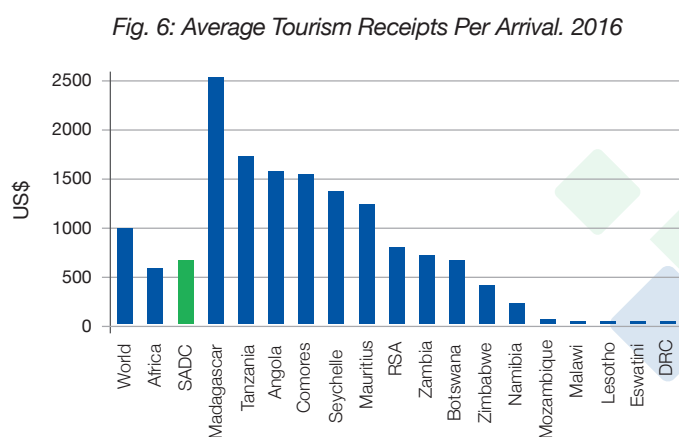


²² UNWTO, (2018): World Tourism Barometer, Vol. 4: October 2018.

²³ While UNWTO's Tourism Barometer consolidates statistics compiled by member countries, the validity and reliability of national arrival and expenditure statistics may not be accurate given the lack of best-practice statistic collection and measurement instruments in some Member State

(US\$141) and Namibia (US\$132), while tourism revenues per capita are almost negligible in Lesotho (US\$18, Eswatini (US\$11), Mozambique (US\$4) and Malawi (US\$2), despite the relatively rich tourism resources of these countries.

Receipts per arrival: Member State policies regarding the kind of tourism they wish to attract and their stage in the tourism life cycle differ substantially. Average receipts per arrival in SADC were US\$670 in 2016, below the global average of US\$1004 per arrival but substantial higher than the average US\$578 per arrival for the continent. Receipts per arrival are highest in the Indian Ocean Islands (high-value resort tourism), Angola (high-value business tourism) and Tanzania (high-value safari tourism)



In summary the scope, scale and development levels of tourism differ substantially among SADC Member States and as such Member States have diverse and varying needs and priorities for tourism support and facilitation.

3.3.2 TOURISM COMPETITIVENESS

Table 4 below presents the World Economic Forum²⁴ Tourism Competitiveness Index, including rankings and criteria²⁵ scores of 12 SADC countries²⁶ in relation to 136 countries measured.

Table 4: Member country rankings on the WEF Tourism Competitiveness Index (2017)*

Sub-Indexes and Pillars	Enabling Environment				T&T Policy and Enabling Conditions				Infrastructure				Natural & Cultural Resources		
	Global Ranking (out of 136)	Business environment	Safety and security	Health and hygiene	Human resource and labour market	ICT readiness	Prioritization of T&T	International Openness	Price competitiveness	Environmental Sustainability	Air Transport Infrastructure	Ground and Port Infra-structure	Tourist Service Infra-structure	Natural Resources	Cultural Resources & Business Travel
South Africa	53	5.3	3.9	3.8	4.6	4.4	4.7	2.4	5.2	3.6	3.4	3.4	4.4	4.4	3.4
Mauritius	55	5.2	5.9	5.3	4.8	4.5	6.0	3.5	4.1	4.3	3.0	4.5	4.9	2.4	1.3
Namibia	82	4.9	5.2	3.5	4.1	3.9	4.6	2.7	5.4	3.9	3.0	3.2	4.0	3.8	1.2
Botswana	85	5.1	5.3	3.5	4.5	4.1	4.6	2.2	5.7	4.5	2.2	2.8	3.6	3.5	1.3
Tanzania	91	4.1	5.1	2.9	3.6	2.7	4.8	3.2	5.4	4.2	2.0	2.6	2.9	4.9	1.5
Zambia	108	4.6	5.4	2.7	4.1	2.8	3.9	2.9	4.8	4.6	1.9	2.3	2.6	3.7	1.3
Zimbabwe	114	3.0	5.5	2.9	3.6	2.9	3.9	2.9	5.1	4.1	1.9	2.4	2.8	3.6	1.5
Madagascar	121	3.6	5.0	3.3	3.8	2.1	4.4	3.0	5.0	3.6	1.8	2.0	2.7	3.1	1.4
Mozambique	122	4.2	4.6	1.8	3.6	2.6	4.0	3.1	4.6	4.2	1.8	2.1	2.8	2.9	1.3
Malawi	123	4.2	5.4	3.0	4.2	2.5	3.4	2.8	4.6	4.2	1.4	2.1	2.2	2.9	1.3
Lesotho	128	4.2	5.4	2.9	3.6	3.2	4.7	1.7	5.0	4.7	1.3	1.9	2.5	2.1	1.0
DRC	133	4.1	4.0	2.8	3.9	1.6	1.9	1.5	3.8	4.0	1.6	1.8	1.9	4.1	1.4

* Average scores, where: 1=Extremely Poor Performance and 7= Extremely Good Performance.

* Colours cascade from Green=Good performance relative to competitors; to Red=Poor performance relative to competitors.

²⁴ World Economic Forum, (2017): The Travel & Tourism Competitiveness Report 2017

²⁵ The Index comprises four sub-indexes, 14 pillars, and 90 individual indicators, distributed among the different pillars, as shown in the picture below.

²⁶ Angola, Eswatini, Seychelles, Comoros are not covered by the index

- As can be seen from the overall global rankings of Member States:
 - 7 of the 12 states measured rank within the first quartile (rankings of 103 out of 136 and lower) in respect of tourism competitiveness. These are Zambia, Zimbabwe, Madagascar, Mozambique, Malawi, Lesotho and DRC.
 - A further three (3) of the 12 states rank within the second quartile (rankings of between 69 and 102 out of 136). These are Namibia, Botswana and Tanzania.
 - Only two countries (South Africa and Mauritius) rank within third quartile (rankings of between 33 and 68 out of 136) and no country ranks within the fourth Quartile (top 32 countries).
- Overall, SADC countries perform well in respect of the sub-index “Tourism Enabling Environment”. Importantly, the majority of countries perform exceptionally well in respect of the pillar “safety and security”, contrary to regular negative news coverage and perceptions.
- Regarding the sub-index “Travel and Tourism Policy and Enabling Conditions” Member States generally fare well in respect of “Prioritization of Travel and Tourism”, “Price Competitiveness” and “Environmental Sustainability”. The majority of destinations fall short in respect of “ICT Readiness” and “International Openness”, especially visa and immigration regimes.
- SADC Member States generally fare poorly in the sub-index “Infrastructure” and especially in air and ground transport pillars.
- As can be expected SADC Member States generally fare well in terms of natural resources, however they fare relative poorly in the pillar “Cultural Resources and Business Travel”. The reason being that, in addition to cultural sites and expressions, this pillar includes indicators such as number of sport fields and number of association (MICE) meetings.

In summary, the WEF Tourism Competitiveness Index indicates that major challenges to be addressed at regional level include:

- Brand building and image management.
- ICT and Internet access.
- International access and openness including air access policies and visa regimes.
- Ground and air access infrastructure.
- Conservation of natural resources as USPs, and improvement of cultural experiences.

3.4 BENCHMARKING LESSONS FROM OTHER REGIONAL TOURISM INITIATIVES

Appendix C provides a comparison of tourism structures of multi-country tourism and tourism-related organisations including Pacific-Asia Travel Association (PATA), Caribbean Tourism Organisation (CTO), Economic Community of West African States (ECOWAS), Indian Ocean Rim Association (IORA) and European Travel Commission (ETC).

The factors considered in the comparisons include a) main purpose/priority, b) governance structure, c) secretariat structure, d) membership criteria, levels and structure, e) how it is funded and f) key activities.

The following are key lessons from the comparison:

- **Facilitation, empowerment and partnership-building are valued capabilities:** The value adding roles of regional organisations increasingly relate to a) empowering Member State tourism sectors (through conducting and disseminating market research, training in tourism management best practices, information management, etc.), b) facilitating tourist movement (through encouraging and advocating seamless visa and immigration practices, advocating and advising on suitable air access policies and practices, ensuring visitor health, safety and security) and c) building partnerships (between Member States, between tourism and other sectors, between public and private sectors, with distribution channels, etc.).
- **Breaking down barriers to travel between countries is a key focus area for such organisations** e.g. introducing a Schengen visa in the EU, introducing a single Caribbean visa during the Cricket World Cup, etc.
- **Most do regional image and brand building:** While most dedicated tourism regional organisations like CTO, PATA and ETC implement regional marketing programmes, such programmes are mainly directed at strengthening a regional image and brand perceptions rather than tactical, segmented and sales driven marketing activities.
- **Established through broad buy-in:** Successful regional bodies have consistent and widespread buy-in from all members and Member States, both in terms of public sector and private industry. A prerequisite for success is that all members must regard tourism as a priority sector.
- **Public-private sector collaboration is essential:** Organisations are widely representative of public and private sectors throughout the region so that they have authority and the experience, expertise and resources they needs. In instances where they do not incorporate membership from both public and private sectors, they have formed strong partnerships between the two.
- **Institutional partnerships are key:** They also thrive on strong partnerships with related institutions, e.g. UNWTO, WTTC, the donor community, etc.
- **Deliver tangible benefits:** Members of such regional organisations should receive meaningful benefits from their membership, which are in line with their needs.
- **Strategically focused:** They operate according to a clear vision, priorities and activities.

- **Operationally “lean and mean”:** They curb bureaucracy, as well as bloated governance and secretariat structures, to reduce running costs and to be able to act swiftly. This includes small, but effective secretariats, which implement focused plans.
- **Built on consensus:** Their focus is on consensus building among diverse parties and members.
- **Adequately and consistently funded:** Funding mechanisms are reliable, fair and from several sustainable sources, not only membership fees.

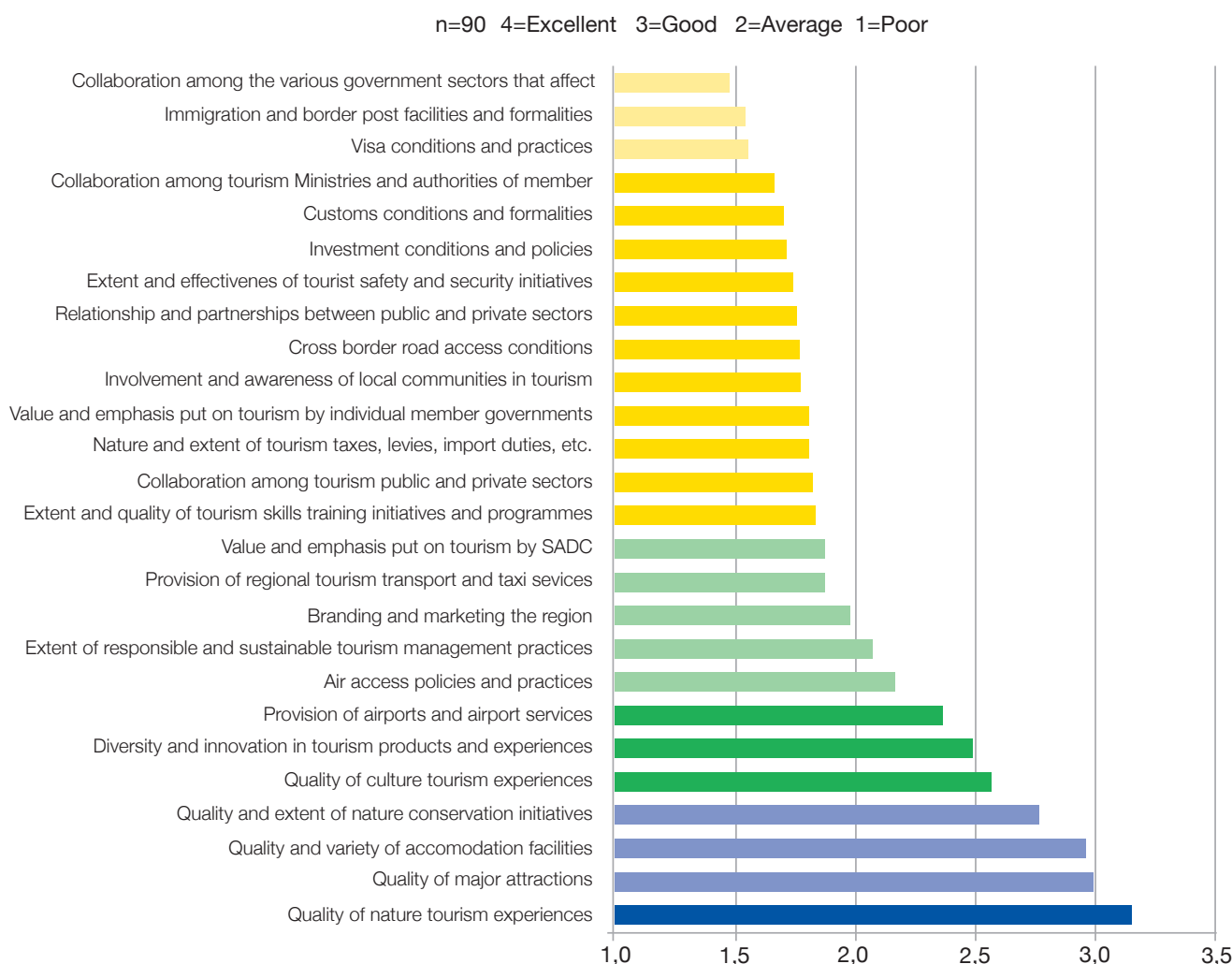
3.5 INDUSTRY VIEWS REGARDING SUCCESS FACTORS FOR TOURISM GROWTH

Appendix D presents the detailed results of the online stakeholder survey. The following section highlights key findings.

3.5.1 VIEWS REGARDING TOURISM MANAGEMENT AT REGIONAL LEVEL

Figure 7 below presents the results of stakeholder views regarding current performance related to various regional tourism management aspects.

Fig. 7: Evaluation moyenne des aspects clefs de la gestion durable du tourisme



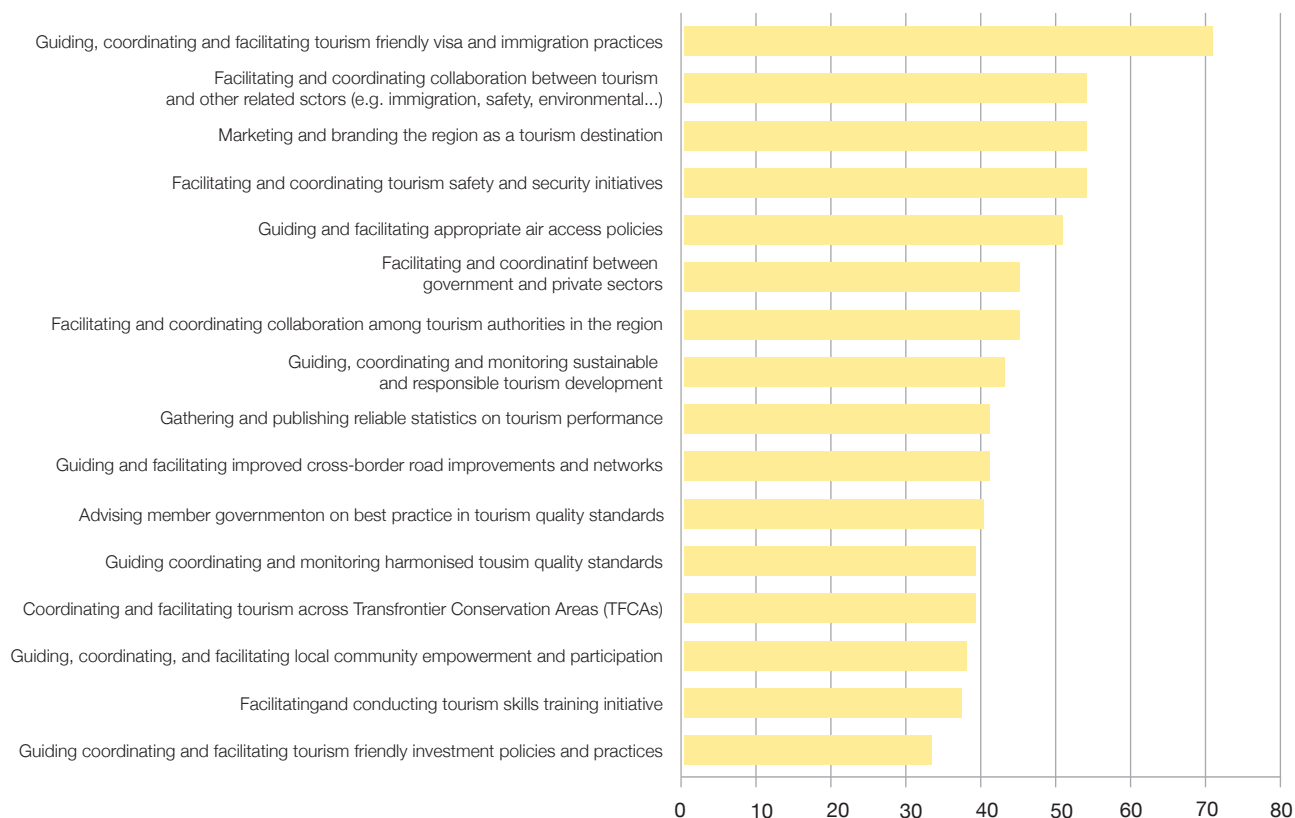
As is clear from Figure 7:

- Respondents generally rated the quality and variety of natural and cultural resources, products and experiences as well as the management thereof as good and acceptable.
- Branding and marketing the region, air and road transport and sustainable management practices were rated as average.
- Tourism management in the region falls short, however, in terms of collaboration and partnerships among the various member tourism institutions and between public and private sectors.
- In addition, conditions for private sector to do business effectively, such as customs conditions and practices, taxation, cross-border access, tourism safety and security and investment conditions are rated as poor.
- The region fares particularly poorly in respect of immigration and visa conditions and procedures, with collaboration between tourism and other sectors that affect the industry receiving the lowest ranking.

3.5.2 VIEWS REGARDING CRITICAL INTERVENTION AREAS FOR SADC

Figure 8 below presents the number of respondents that rated various potential SADC tourism interventions as “critically important” when asked to “Rate the importance of including the following potential activities in the SADC Secretariat tourism plan of action over the next 5 years (please evaluate critically for prioritising activities)”.

Fig. 8: Nombre des répondants qui ont évalués certains aspects comme “Tres important” pour la SADC (n=90)



Key findings are:

- Improving visa and immigration practices was top of mind with respondents, with almost 80% of respondents rating this aspect as “critically important” for SADC to address.
- Issues deemed critically important by 60% of respondents and more are:
 - Ensuring greater collaboration between tourism and other sectors that are instrumental for tourism advancement, including immigration, safety, environmental management, trade, etc.)
 - Marketing and branding the region
 - Facilitating and coordinating tourist safety and security
 - Guiding and facilitating suitable air access policies
- Aspects deemed critically important by around 50% or more respondents are:
 - Facilitating collaboration between the various Member State tourism authorities
 - Facilitating collaboration and dialogue between public and private sectors
 - Guiding, coordinating and monitoring sustainable tourism practices in the region

More than half or respondents also made specific suggestions regarding tourism improvements and these covered the following topics (see Appendix D for details):

- Improving visas and immigration conditions, including implementing a Univisa and improvement of Immigration and Custom services at Border Posts for tourists.
- Ensuring visitor safety including a regional crackdown on crime, corruption, and roadside harassment of tourists by traffic cops.
- Smoother and freer vehicle and tourist guide permitting and cross border access.
- Standardising and liberalising tourist guiding requirements across the region.
- Improving the business environment and reducing cost of doing business.
- Infrastructure improvements, especially road conditions.
- Strengthening conservation and protection of wildlife.
- More marketing and promotion to enhance regional brand perceptions.
- Improved tourism awareness among the youth, communities and government leaders.

- Liberalising air access and improved charter services.
- Improved skills training and local empowerment.
- Better institutional collaboration, especially collaborations between tourism bodies and airlines.

3.6 SUMMARY OF KEY TOURISM GROWTH OPPORTUNITIES AND CHALLENGES

Based on the findings, the following are major strengths/opportunities and weaknesses/threats that could affect tourism growth in Southern Africa over the period of the Tourism Programme.

STRENGTHS AND OPPORTUNITIES	WEAKNESSES AND THREATS
NATURAL, CULTURAL AND ENTREPRENEURIAL RESOURCES	
<ul style="list-style-type: none"> • Cultural variety and authenticity could become a USP for the region • Cultural tourism offers opportunities for inclusive economic growth and job creation and skills training • The region has a high quality and variety of nature-based resources, including diverse eco-systems and landscapes that appeal to many market segments as well as a high population of iconic natural species • TFCAs offer opportunities for product strengthening and diversification • Tourism offers potential for economic inclusion of a broad spectrum of citizens through job creation, engaging in business practices by leveraging their natural and cultural resources, (e.g. accommodation provision, eco-villages, vegetable gardening projects, etc.) and supply chain opportunities (e.g. repair services, transport, construction, fresh produce provision, etc.) • New, disruptive marketing channels and platforms (AirBnB, Uber, etc.) open up entrepreneurship and job opportunities for local communities • There is potential for product enrichment, product combinations and diversification of offering, e.g. “telling the story” behind what is actually tabled in restaurants, (e.g. breadfruit, herbs, etc.), local agro-tourism experiences, etc. • Opportunities could be pursued for game restocking on conservancies and in national parks • Various good practice examples of CBT in region can be drawn on e.g. conservancies in Namibia, Tanzania (best practice awards) • Sustainable tourism management can be a special positioning approach for the region • New technologies can be used to disseminate research information to the right users 	<ul style="list-style-type: none"> • Limited visitor access to many nature and cultural experiences (location, roads, market readiness, book-ability) • Language barriers prevent some communities from “telling their story” • Lack of awareness and knowledge of offering cultural experiences as commercial products • Governments generally give limited priority to cultural tourism • Limited depth and sophistication of visitor interpretation regarding cultural and natural phenomena • Conservation polices are inconsistent across the region • Threat of poaching and destruction of natural resources • Difficulties in traveling across borders to experience the best on offer in the region • Countries lack differentiation in safari experiences • The upmarket nature tourism segment has a high economic leakage factor • Inconsistency of community-based experiences • Governance challenges in many CBT projects, especially financial management and fair distribution of benefits • Inadequate collaboration and coordination between tourism and other sectors in Member Countries, to establish linkages to tourism • Poor access to commercial finance for community-based entrepreneurs • CBT experiences need more marketing and stronger tour operating relationships • Lack of clear guidelines for establishing sustainable CBT enterprises and for moving from leasing models to full community ownership, including consistent legal requirements • Lack of understanding, information and skills among youth and entrepreneurs regarding sustainable tourism management • Need for clarity regarding sustainable tourism labels and merits thereof • The impact of climate change poorly is understood and creates uncertainty
DEMAND CONDITIONS	
<ul style="list-style-type: none"> • SADC can play an important role in regional reputation management • SADC can serve as a networking forum for individual destinations to collaborate in multi-destination promotions and to learn marketing best practices from others • New technologies offer major opportunities for collective regional e-marketing • A focused and segmented marketing approach can ensure complementarity of individual destinations to serve specific market segments • Airport infrastructure is improving across the region, opening up opportunities for improved air access • New tourism hubs are emerging e.g. Victoria Falls/Livingstone where more and larger aircraft are landing • SADC TFCA tourism infrastructure development plan has been developed 	<ul style="list-style-type: none"> • Individual countries compete for market share – a such it is difficult to promote the entire region • Unequal tourism status of Member States – including policies, funding, immigration openness, etc. • Higher risk of casting unfavourable health/safety perceptions related to one/a few countries on the entire region, when promoting such a broad area • Funding for regional reputation management and marketing is limited • Poor road access to many attractions, especially across borders • Weak regional airline network and high air costs, also on domestic flights • Limited collaboration between airlines and national marketing organisations • Underutilised airport infrastructure in various destinations

STRENGTHS AND OPPORTUNITIES	WEAKNESSES AND THREATS
DEMAND CONDITIONS	
<ul style="list-style-type: none"> • Opportunities for capitalising on new technologies and digital processing to ease cross-border movement • Possibilities of one-stop border posts with two countries on same premises, e.g. Kgalagadi TFCA • Possibilities of a Univisa or joint visas for multiple destinations/ countries e.g. KAZA visa • Opportunity of expanding free cross-border movement in TFCAs • SADC can play a key role in harmonising visa regimes across the region and to collaborate with security services to ensure more seamless visa systems and e-visa • Possibility of completely scrapping visas for regional markets in SADC • SADC as a forum to learn from other regions/areas how they implement and share revenues of collective visas 	<ul style="list-style-type: none"> • No consistency of visa regimes and costs – Member States have their own policies • Cumbersome visa application procedures for many countries • Lack of collaboration and understanding between tourism and immigration authorities • Cumbersome cross-border immigration processing, congestion, poor visitor facilities and inconsistent procedures and entry forms at various border posts • Variety of taxes for moving around in region – inconsistent, poor communication – leads to visitor confusion and reluctance to visit • Poor service, corruption and bribery by some immigration officials
SUPPORTIVE FACILITIES AND SERVICES	
<ul style="list-style-type: none"> • SADC is in a position to promote professional planning for diversifying tourism investment opportunities across the region • Opportunity to learn about successful investment practices and schemes of member countries e.g. Mauritius resort and individual investment schemes • Possibility of leveraging synergies with the SADC Trade-in-Services Protocol • SADC can advocate for tourism supply chain interventions e.g. state support for local (regional) procurement of tourism goods and services, waving custom duties for tourism products and services supplied from within the region, etc. • Opportunity of advocating for harmonising investment application and licensing systems across the region • Opportunity to harmonise tourism skills training content and accreditation systems • Possibility of SADC garnering support for training and capacity building by donors and private sector • Best practices in cross border guiding can be shared e.g. bilateral guide agreement between RSA and Namibia • Work done by RETOSA on harmonising hospitality quality standards and training can be further used and expanded • SADC can ensure greater collaboration among tourism and safety/security and health organs of SADC to ensure a greater focus on tourist security and health • SADC as vehicle for a regional PR, crisis communication and image management • Information can be exchanged among Member States regarding best practices in visitor safety management using latest technologies • Opportunity for consistent visitor communication and information programme on insurances required, safety guidelines, cultural do's and don'ts, etc., using new technologies • SADC can create regional awareness of need and procedures for public liability insurance 	<ul style="list-style-type: none"> • Too much bureaucracy, high costs and red tape for tourism investment and business establishment • SMEs in the region have high barriers to entry – financing, market access, skills, etc. • Land security and tenure are tenuous in some Member States • Financial institutions in region don't understand tourism business returns and avoid tourism financing • The industry is highly taxed in many Member States • High perceived investment risk and political uncertainty in some areas, with the result that investors shy away • Tourism skills training efforts and accreditation processes are inconsistent and are not harmonised across the region • Inadequate capacity of trainers and training institutions • Inadequate local tourism management skills, with such positions mostly occupied by foreigners • Cumbersome and inconsistent work permit policies and systems curb tourism professionalism • Restrictive cross-border tourist guide regulations in some countries prevent tour operators from deploying guides • Language barriers at local community level a challenge for CBT • Lack of common hospitality standards across region and differences of opinion regarding need for such • Lack of appropriate standards guidelines for community products • Disruptions caused by the “sharing economy” do not always respect local regulations • Authorities struggle to enforce standards systems given limited resources • There is insufficient quality and availability of emergency and health services in many tourist areas • Ignorance and often false perceptions prevail among potential visitors regarding visitor health, safety and security in region • Lack of public liability mechanism for industry • Lack of crisis management, communication and victim support plan across region • Unfair and poorly informed travel advisories issued by many governments

STRENGTHS AND OPPORTUNITIES	WEAKNESSES AND THREATS
INDUSTRY ORGANISATION AND COLLABORATION	
<ul style="list-style-type: none"> • Potential for Member States pooling resources in bilateral and multi-lateral marketing initiatives • Opportunities for knowledge sharing and mentoring regarding destination marketing region • SADC can play a role in promoting intra-regional tourism and travel among SADC citizens • Opportunity for innovative approaches and mechanisms to ensure private sector involvement in SADC Programme execution, e.g. pre-Indaba public-private tourism business forum • Tourism to be hiked-up on SADC agenda, with instructions to other sectors to give it priority • Accommodating tourism on the Joint Committee on Security and Wildlife sets an example of collaboration with other clusters and for tourism to stake its claim in policies and initiatives of related sectors • Possibilities of capitalising at regional level on existing, available performance statistics e.g. booking engines, airline partners, entrances at public attractions, etc. • Tourism should be included in national and regional strategies for development of statistics • SADC could develop guidelines and undertake regional training workshops in gathering statistics and data management 	<ul style="list-style-type: none"> • Tourism not given the priority it deserves within SADC and Member States, despite lip service • Government funding for tourism marketing is limited • Promoting an umbrella regional tourism brand has proven difficult due to competition among individual Member States • Lack of private involvement in policy formulation and previous marketing execution efforts • Poor sector incentives and lack of effective forums to encourage public-private partnerships • Insufficient community benefits from private investment projects • Lack of synergy between tourism and other influential sectors e.g. immigration, customs, safety and security, health, nature and culture conservation, etc. • SADC and Member State tourism-related departments working in “silos” - lack of integrated planning with tourism as an area of focus • Lack of reliable and timely tourism statistics a challenge for the majority of Member States • Generally weak institutional coordination among variety of players involved in gathering tourism statistics • Private sector is generally un-cooperative in supplying valid and reliable performance statistics • Lack of technical capacity and harmonised systems and models for collecting and reporting of tourism data • Limited resources and external support for developing and managing tourism research and statistics

4 Programme Strategic Direction

The following section sets out a tourism vision, mission, key focus areas and engagement roles for the SADC Tourism Programme.

4.1 VISION

By 2030 growth in cross-border, multi-destination travel in SADC will exceed average global tourism growth levels.

4.2 MISSION

Advocating, facilitating and effectively coordinating tourism policies, programmes and practices in the region in collaboration with Member States.

4.3 OBJECTIVES

The SADC Tourism Programme strives to achieve the following objectives:

- Exceeding average global growth levels in tourism receipts and arrivals to and within the region, as measured by UNWTO's Tourism Barometer.
- Broadening the spread of tourism arrivals and receipts among SADC Member States, i.e. increasing the number of countries visited on average.
- Extending the average length of stay of visitors in the SADC region.
- Increasing return visitation to the region.
- Harmonising policies that are geared at the development and growth of tourism in SADC.

4.4 GROWTH PRINCIPLES

SADC will pursue these growth objectives based on the following principles:

- **Sustainable tourism development:** In accordance with the UNWTO's Agenda for Africa and the Sustainable Development Goals (SDGs), SADC will promote tourism development that results in:
 - Environmental sustainability, which should underpin all development decisions and industry operations.
 - Social and cultural equity, economic inclusion, empowerment and transformation, by duly considering the interests of local residents and promoting participation in tourism of marginalised groups (such as rural communities, women and youth) who are in need of entrepreneurial and employment opportunities.
 - Economic viability, striving for the best tourism yields per visitor by maximizing visitor expenditure and reducing leakage of tourism revenues out of the local economy.
- **Maximising partnerships:** While SADC TCU will play a leadership role in implementing this Tourism Programme, tourism value is created by a range of parties and true partnerships among role-players is key to the success of the sector. This implies a tourism growth approach that is:
 - Government led, with government authorities providing the strategic direction, appropriate policies and legal frameworks, destination management and marketing support, infrastructure and public services for tourism to happen in a sustainable manner.
 - Private sector driven, with the private sector investing in and operating tourism commercial facilities and services in a competitive manner.
 - Community based, with local communities hosting tourists safely and hospitably and benefitting from tourism proceeds.
 - Labour conscious, with the tourism sector offering fair employment conditions and organised labour being committed to the regional tourism growth vision.
- **Whole of Government approach:** Within SADC and its Member States, departments other than tourism provide most of the services underpinning tourism growth. Successful implementation of the SADC Tourism Programme requires:
 - Partnership among SADC structures: A variety of departments in the SADC Secretariat and Member States are key partners in implementing the strategy. These include immigration, transport, public safety, roads, culture development and others. Formalized, strong partnerships should be forged between tourism and other relevant departments in SADC and its Member States.
 - Partnership between SADC and other relevant governmental tiers, agencies, NGOs and private sector organisations: The delivery of tourism infrastructure, destination marketing and management of key attractions such as the national parks, Transfrontier Conservation Areas and World Heritage Sites is mandated to various semi-government and non-governmental organisations and agencies such as tourism boards, conservation and heritage agencies, a variety of NGOs, private sector organisations and forums and other agencies that work in partnership with governments. SADC will forge strong partnerships with relevant agencies and organisations.

4.5 ROLES OF THE SADC TCU

Given SADC TCU's limited resources and the fact that tourism is a highly integrated sector, SADC TCU will take a three-tiered approach in implementing the SADC Tourism Programme, depending on the issues at stake, namely:

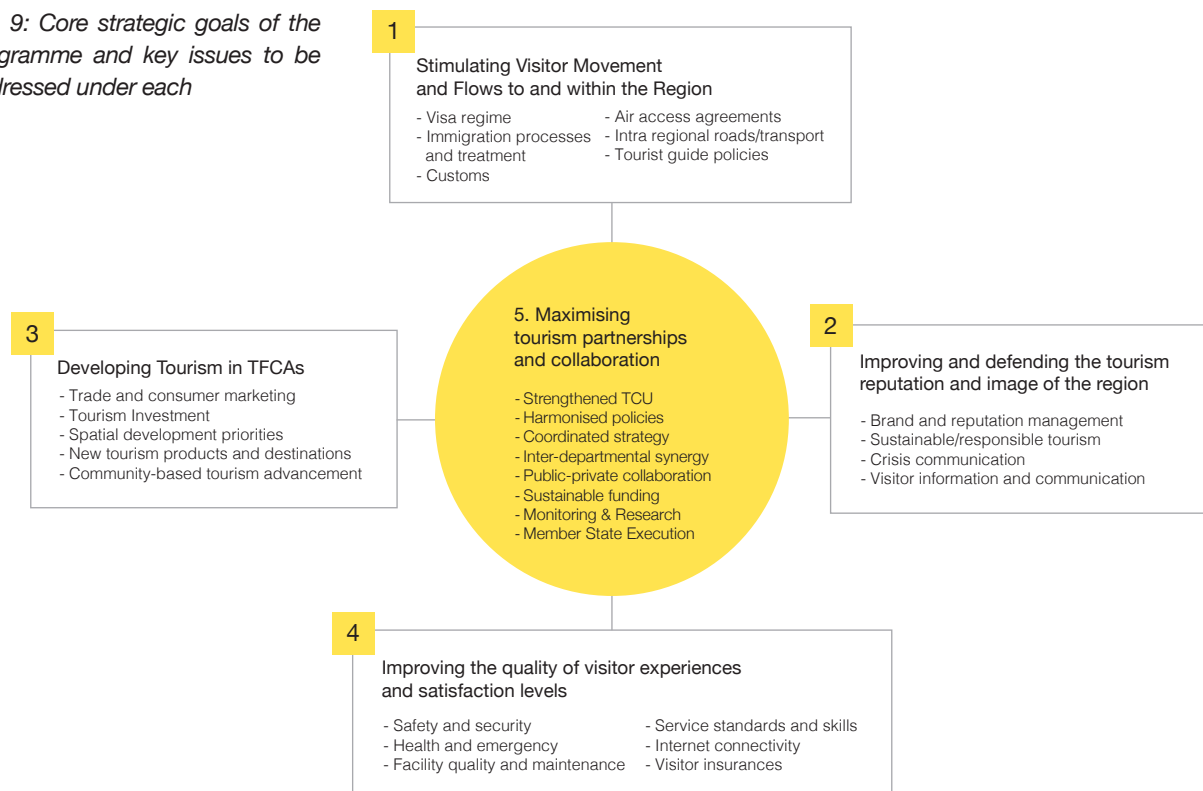
SADC TCU Roles ²⁷
<p>Advocacy: “to publicly support or suggest an idea, plan, or way of doing something”</p> <p>SADC TCU to act as a mouthpiece for advancing policies and Programmes that will lead to or support sustainable tourism growth, over which the TCU has no or little direct control, influence or which are not regarded as priorities for applying substantial TCU resources.</p>
<p>Facilitation: “to help people deal with a process or reach an agreement or solution without getting directly involved in the process yourself”</p> <p>SADC TCU to act as coordinator and mediator for advancing policies and Programmes that will lead to or support sustainable tourism growth, over which the TCU has no or little direct control but where it is in a position to guide, advise, coordinate and/or engage implementing partners, applying its resources to leverage substantial value.</p>
<p>Implementation, coordination and monitoring: “to put a plan or system into operation”</p> <p>SADC TCU, in association with Member State tourism authorities, to take responsibility for delivering policies and Programmes that will lead to or support sustainable tourism growth, over which TCU has a direct mandate and control and to which it will apply its internal financial and human resources.</p>

4.6 KEY FOCUS AREAS

Given the challenges and opportunities highlighted in Section 3 and the future vision and objectives adopted in Section 4, SADC Tourism Programme will pursue five core strategic goals, namely:

- Goal 1:** Stimulating visitor movement and flows to and within the region
- Goal 2:** Improving and defending the tourism reputation and image of the region
- Goal 3:** Developing tourism in Transfrontier Conservation Areas
- Goal 4:** Improving the quality of visitor experiences and satisfaction levels
- Goal 5:** Maximising tourism partnerships and collaboration

Fig. 9: Core strategic goals of the programme and key issues to be addressed under each



²⁷ Definitions below as per Cambridge Dictionary: <https://dictionary.cambridge.org/dictionary/english/>

5 Programme Goals and Activities

The five strategic goals will be addressed through the strategies and actions outlined below

5.1 GOAL 1: STIMULATING VISITOR MOVEMENT AND FLOWS TO AND WITHIN THE REGION

The following strategies will be pursued towards achieving this goal:

1. Immigration Facilitation Programme with 3 Programme activities
2. Air and Road Access Improvement Programme with 4 Programme activities
3. Human Resource Mobility Programme with 3 Programme activities

The strategies and Programme activities for each are described below.

Strategy 1.1	Immigration Facilitation Programme	Role
Rationale	Easing visitor immigration processes and cross border visitor movement is a key success factor for stimulating tourism to and within the region. The industry survey re-enforced the need for improved visa and immigration conditions. The following activities will be undertaken:	
Programme Activity	<p>1. Harmonising visas: Current visa requirements pose a number of problems for regional tourism growth, including the need for multiple visas when crossing borders, variations in visa requirements among member countries, high cost of visas, difficulties of obtaining visas, varying application procedures and forms, etc. The following activities will be undertaken:</p> <ul style="list-style-type: none"> • Conduct an assessment of current visa processes, successes and constraints in SADC, including: <ul style="list-style-type: none"> - Ascertaining the current nature and extent of visa requirements of Member States, constraints in this regard and how these affect tourism - Ascertaining what studies, procedures and schemes have been concluded in the region to address immigration challenges and lessons learnt in this regard - Identify best practices in easing visitor movement in the region (e.g. free movement among island Member States) and promote such models among Member States 	Implement
	<ul style="list-style-type: none"> • Further expand benchmarking studies of multiple-country visa practices conducted by RETOSA e.g. Schengen, CARICOM, East Africa, etc. and identify operational principles and logistics that could be applied in SADC. 	Implement
	<ul style="list-style-type: none"> • Based on the findings, present the Ministerial Committee on Tourism with a proposed phased plan of action for approval, including: <ul style="list-style-type: none"> - Simplifying the visa regime towards a SADC Univisa or fewer visas for SADC, e.g. expanding the KAZA visa for agreed regional blocks, developing a “Regional Pass” for easier cross-border movement of SADC residents, etc. - Harmonising visa application and issuing processes e.g. through implementing E-visa and visa-on-arrival across the region, simplifying and harmonising application forms and visa charges, etc. - Harmonising and reducing visa costs where required. - Setting in motion a process of Visa Exemption for tourism. - Full implementation of the SADC Protocol on Free Movement of Persons (FMP) 	Implement
	<ul style="list-style-type: none"> • Arrange a joint meeting/workshop of the SADC Organ on Politics Defence and Security and the SADC Ministerial Committee on Tourism to discuss and agree the proposals and to form and set up a joint Immigration Implementation Committee. 	Implement/ Facilitate
	<ul style="list-style-type: none"> • Revise the plan of action based on workshop decisions and present to the Council of Ministers for approval. 	Implement/ Facilitate
	<ul style="list-style-type: none"> • Play a supportive role to the joint Immigration Implementation Committee in implementing proposals and monitoring progress. 	Facilitate

Strategy 1.1	Immigration Facilitation Programme	Role
Programme Activity	<p>2. Improving border posts: Cross-border tourists often travel long distances on tight time frames. In planning a trip and deciding on routings and which countries to include, tourists (especially independent travellers) consider the time and effort required to cross borders and tourist facilities at such crossings. Key tourist border crossings need to provide easy and hassle-free processes and adequate facilities.</p>	
	<ul style="list-style-type: none"> • In collaboration with Member States and with the support of the SADC Organ on Politics Defence and Security, formulate a best-practice guideline for tourist-friendly border post facilities, processes and services by benchmarking border post conditions in high quality, comparable countries. Among others, this could include: <ul style="list-style-type: none"> - Possibilities and conditions for shared premises and “one stop” border posts - Tourist facilities and services - Procedures, forms, technologies employed - Consistent queuing policy for foreign and regional residents - Effective information and signage - Immigration officials’ conduct and speed of operation - Health checking procedures and facilities 	Implement
	<ul style="list-style-type: none"> • As a pilot study, identify one or two main tourist border crossings in the region and conduct an audit of tourist facilities, services and procedures at such border posts using the best practice guideline, including a remedial action Programme to address shortcomings. 	Implement
	<ul style="list-style-type: none"> • Present the findings at the joint Immigration Implementation Committee or a suitable forum and promote adherence and improvements by Member States. 	Advocate
	<ul style="list-style-type: none"> • Monitor border post improvements and convey findings to joint Immigration Implementation Committee and relevant Ministerial Committees. 	Implement
Programme Activity	<p>3. Improving immigration services: While the conduct and service levels of immigration staff (immigration officials, security personnel and other staff) have improved at many border posts over the past years, complaints of poor service and bribery remain a challenge at many border posts. This will entail the following actions:</p>	
	<ul style="list-style-type: none"> • Develop a tourism-focused Customer Service Training Programme, for implementation by members states, specifically directed at immigration and other personnel deployed at border posts. This may include, among others: <ul style="list-style-type: none"> - Understanding of the tourism industry and the link between tourism and immigration - Customer interaction and communication good practices - Staffing levels and management for fluctuating demand - Dealing with tourists in difficult circumstances and crises 	Implement/ Facilitate
	<ul style="list-style-type: none"> • Promote harmonisation of service standards and visitor welfare at border posts, by facilitating interaction and training among various Member State government agencies. 	Facilitate/ Advocate
	<ul style="list-style-type: none"> • Develop communication materials and apply Information Communication Technologies (ICTs) for combatting tourist anti-bribery awareness and promoting the usage of these among Member States. 	Implement/ Facilitate

Strategy 1.2	Air and Road Access Improvement Programme	Role
Rationale	Quality and cost of road and air access are key determinants when overland travellers and travellers by air plan and execute regional tourist itineraries. The success and growth of regional travel growth and development of TFCAs therefore depends heavily on ease and affordability of road and air access.	
Programme Activity	1. Improving air access policies and practices: High cost and inconvenient air access is a major tourism constraint for many SADC destinations. While inadequate demand is often an inhibitor of feasible route expansion, liberalising air access policies and practices in accordance with the Yamoussoukro Decision on air access liberalisation and in accordance with best practices can play an important and positive role in air expansion, both on international, regional and domestic routes. In addition, airports in Southern Africa should be improved to international standards and should be encouraged to expand international air connectivity.	
	<ul style="list-style-type: none"> Conduct a comparison of air access policies, practices and infrastructure among Member States, including: <ul style="list-style-type: none"> Comparison of flight availability and costs from major markets and on major routes, including key domestic tourist routes The nature and extent of bilateral air services agreements with key potential tourist markets Nature and extent of airport infrastructure Airport landing charges, taxes, fees, fuel costs, etc. at international and domestic airports that service main tourist destinations in Member States Other key factors affecting the cost of domestic scheduled and charter flights 	Implement
	<ul style="list-style-type: none"> Conduct a best practice benchmark study of successful air access policies, practices and infrastructure, compare with regional SADC Member State practices and identify key gaps and opportunities. 	Implement
	<ul style="list-style-type: none"> Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services and promote adherence to best practices. 	Advocate
	<ul style="list-style-type: none"> Track progress on air access and airport advancement and growth on a bi-annual basis. 	Implement
Programme Activity	2. Harmonising tourism customs costs and requirements: Customs procedures and costs differ significantly among member countries and affect the cost and effort involved in conducting overland travel. This includes a variety of vehicle entry taxes in some countries including Commercial Vehicle Guarantee (CVG), Third-Party Insurance, Road Access/Transport Fee, Exit Pass, Carbon Tax, etc.	
	<ul style="list-style-type: none"> Conduct a comparison of vehicle (including rental car and overland tour vehicle) entry policies, costs and practices among Member States, identify inconsistencies and unnecessary costs and taxes and recommend measures to harmonise costs and practices and to allow greater freedom of movement of tour operators. 	Implement
	<ul style="list-style-type: none"> Set standards for cross-border rental cars and touring vehicles and agree affordable custom tariffs for tourist rental cars and touring vehicles. 	Facilitate
	<ul style="list-style-type: none"> Engage the Southern African Customs Union (SACU) on their policies and initiatives and integrate in SADC tourism position 	Facilitate
	<ul style="list-style-type: none"> Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services, promote adherence to best practices and monitor changes and improvements. 	Advocate
Programme Activity	3. Improving priority tourism roads: Roads of adequate quality that are navigable throughout the year are critical for advancing regional tourism as tourists on a regional itinerary often wish to visit sites and engage in experiences that are not accessible by air.	
	<ul style="list-style-type: none"> Update the SADC Regional Infrastructure Development Master Plan (RIDMP), Tourism (TFCAs) Sector Plan (2012), to include progress to date and to cover the entire region and all TFCAs. 	Implement
	<ul style="list-style-type: none"> Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services, promote implementation of prioritised road improvement proposals. 	Advocate
	<ul style="list-style-type: none"> In association with Member States, monitor condition of roads and progress with road improvements on an annual basis and report back to the relevant Ministerial Cluster Committees. 	Facilitate

Strategy 1.2	Air and Road Access Improvement Programme	Role
Programme Activity	<p>4. Improving road and interpretative signage: While GPS systems have largely improved the potential for self-drive travellers to find in the region, end destinations/facilities often do not show on local GPS systems and Internet connectivity is often not operational in lesser-travelled areas. Proper road and interpretive signage remains an important mechanism for ensuring ease of navigation by tourists to the region.</p>	
	<ul style="list-style-type: none"> • Further improve the SADC guideline manual on tourism road signs (brown signs) provision, including design of signs, symbols used, design and colours, acceptable rules regarding the number and location of road signs, examples of best practices in the region, etc. 	Implement
	<ul style="list-style-type: none"> • Present and distribute the findings to SADC Cluster of Ministers responsible for Infrastructure and Services, promote implementation of standardised international road signs. 	Advocate
	<ul style="list-style-type: none"> • Promote the provision and signage of adequate rests stops along major regional highways 	Advocate
	<ul style="list-style-type: none"> • Offer a regional training course on tourism road signs practices, international rules and application and approval processes for provision of tourism road signs. 	Implement/ Advocate

Strategy 1.3	Human Resource Mobility Programme	Role
Rationale	The growth and development of regional tourism is highly dependent on the availability and regional mobility of skilled tourism manpower. While tourism is an important vehicle for local job creation and while local skills development should be given priority, the least developed tourism countries in the region need to build their tourism industries over time in line with international service levels. This is particularly relevant when targeting the upmarket safari and business tourism segments. Foreign and regional skilled employees can play an important role in ensuring high quality service levels and mentoring locals to step into suitable positions. Effective tourism and hospitality management skills are in short supply in many countries and it is important for destinations to be able to draw on a wider regional labour pool when recruiting scarce skills.	
Programme Activity	1. Harmonising regional qualification recognition and training accreditation systems: Tourism skills and qualification recognition and trainer accreditation systems differ significantly among member countries, resulting in workers from member countries displaying varying abilities and skill qualities. Harmonised qualification standards in member countries will improve the pool of equally skilled tourism manpower and ensure greater mobility of skills at regional level.	
	<ul style="list-style-type: none"> Conduct a comparative assessment of tourism skills development initiatives, facilities and qualifications accreditation systems in Member States and highlight opportunities, differences and gaps, giving due consideration to studies or investigations previously done in this regard. 	Implement
	<ul style="list-style-type: none"> Present the findings to the SADC Cluster of Ministers responsible for Social and Human Development and Special Programmes and engage members of the Cluster in a discussion towards improved harmonisation of tourism and hospitality qualifications and skills training in the region. 	Facilitate
	<ul style="list-style-type: none"> Collaborate with the SADC Cluster of Ministers responsible for Social and Human Development and Special Programmes to develop a regional exchange Programme for tourism skills development. This may entail an agreement whereby training institutions in more advanced tourism countries in the region will offer selected students from other countries, tourism training opportunities at reduced or subsidised cost, in exchange for job opportunities for their citizens. Similarly, privately owned establishments in cross-border areas could be encouraged to provide exchange opportunities (e.g. guides and game rangers) for staff to learn about conditions across the border. 	Facilitate
Programme Activity	2. Harmonising work permit policies: Work permit approvals and allocations vary considerably among member countries. Challenges of obtaining work permits for staff inhibit tourism investment, as investors need to know that they are able to employ experienced staff, especially during the business launch stages. Such staff members are often not available in developing tourism destinations.	
	<ul style="list-style-type: none"> Conduct a comparative assessment of work permit regulations and approval processes in Member States, highlight differences and gaps, consider agreements and policies of the Trade and Services Cluster on skills mobility in the region and make proposals for improving work permitting policies to the benefit of regional tourism development. 	Implement
	<ul style="list-style-type: none"> Present the findings to the SADC Cluster of Ministers responsible for Social and Human Development and Special Programmes and engage members of the Cluster in a discussion towards liberalisation and harmonisation of work permit allocations and approval processes in the region. Care should be taken to promote preferential employment for SADC nationals and, where foreigners are employed due to regional skills shortages, compulsory mentoring and capacity building of local employees by permit holders. 	Facilitate
	<ul style="list-style-type: none"> Encourage Member State tourism authorities to engage the relevant sister Ministries in their countries to adopt SADC agreed tourism work permit policies and practices. Where necessary, Member States can agree approaches on a reciprocal bases. 	Advocate
Programme Activity	3. Ensuring greater tourist guide mobility: Member State policies differ in respect of tourist guide entry and registration requirements. Restrictive, unclear or sub-standard tour guiding can affect the reputations of SADC Member States, prevent cross-border business linkages and may discourage tour operators from developing and promoting cross-border packages.	
	<ul style="list-style-type: none"> Conduct or update studies already done as part of a comparative assessment of tour guiding registration and entrance regulations in Member States, including island Member States, highlight differences and gaps and recommend best practices. 	Implement
	<ul style="list-style-type: none"> Conduct a workshop with leading regional (cross border) tour operating companies, leading guides and guide associations, including island Member States, to discuss government and private sector views regarding regional tour guiding and formulate a SADC tourism position paper on tour guide policies and practices. 	Implement
	<ul style="list-style-type: none"> Present results to Committee of Tourism Ministers for endorsement and to the Council of Ministers to adopt the position paper as a SADC approach to tour guide practices. 	Advocate

5.2 GOAL 2: IMPROVING AND DEFENDING THE TOURISM REPUTATION AND IMAGE OF THE REGION

The following strategies will be pursued towards achieving this goal:

1. Image Communication Programme with 3 Programme activities
2. Sustainable Southern Africa Programme with 2 Programme activities

These strategies and Programme activities for each are described below.

Strategy 2.1	Image Communication Programme	Role
Rationale	Experience has shown that regional (SADC) destination marketing has not been entirely successful, given the mandate of national tourism organisations to promote their countries. However, SADC can play an important role in collaboration with Member State tourism organisations protecting and enhancing the image of Southern Africa as a travel destination, especially in respect of personal health, safety and general knowledge of conditions in the region.	
Programme Activity	1. Formulate a regional tourism communication strategy that should clearly define target audiences, communication messages, channels, types of information to communicate, complementarity with existing platforms and initiatives at regional level and in Member Countries as well as other aspects that will determine the scope and scale of communication systems to be developed. Communication should also be focused on Southern Africa citizens to raise awareness and perceptions of tourism.	Implement
	<ul style="list-style-type: none"> Establish digital communication platforms: Potential visitors, travel trade professionals and local citizen use digital platforms, especially websites and social media information platforms to keep abreast of conditions and opportunities in destinations they wish to visit. The following platforms will be set up and maintained by the TCU, considering potential evolvement of previous RETOSA digital platforms: 	Implement
	<ul style="list-style-type: none"> Establish a southernafrica.travel website, which contains travel guidance information on the region, immigration requirements, safety, health, currency exchange and other relevant information. The website should be mobile friendly and could have links to the various country member tourism promotion websites. It should have a “Newsflash” section, where information will be carried on latest developments in travel practicalities such as new cross-borders product developments (e.g. in TFCAs), health and safety conditions, immigration and visa changes and improvements, weather conditions etc. 	Implement
	<ul style="list-style-type: none"> Establish a Twitter account linked to the website, which could serve as communication mechanism to communicate the above-mentioned information as well as exceptional events/ achievements of a regional nature. 	Implement
	<ul style="list-style-type: none"> Establish a Facebook page linked to the website, where similar information is carried, with links to Facebook pages of member destinations. 	Implement
	<ul style="list-style-type: none"> Establish a Southern Africa tourism blog linked to the website, where influencers can be invited to write positive stories and where issues and potentially damaging events can be put into perspective. 	Implement
	<ul style="list-style-type: none"> Development and maintenance and updating of the platforms will be assigned to a specific individual within TCU or will be outsourced if this is not possible. 	Implement
Programme Activity	2. Conducting a regional Public Relations Programme: Given the wide range of destinations and experiences on offer in the region, it will be important to build the overall image of the SADC region among the travel trade, potential consumer markets and regional citizen. Achievements such as conservation initiatives, TFCA successes, anti-poaching successes, new World Heritage sites, exceptional nature and cultural events, etc. should be celebrated and communicated to targeted audiences in order to build and strengthen the regional image and credibility over time.	
	<ul style="list-style-type: none"> Based on the communication strategy formulated in 2.1.1 above, appoint a qualified PR company to conduct tourism image communications and manage digital media on behalf of the TCU. 	Implement
	<ul style="list-style-type: none"> Link all communication messages and releases to the established digital platforms and share and republish content via Member State digital and other media platforms. 	Implement/ Facilitate

Strategy 2.1	Image Communication Programme	Role
Programme Activity	<p>3. Developing a crisis communication strategy: It is well known that various member countries from time to time experience health, political, safety and other crises. The true facts and extent of such events are often distorted through poor or haphazard communication, with the result that perceptions of unaffected parts of the region may be unduly tainted.</p>	
	<ul style="list-style-type: none"> Formulate a tourism crisis communication strategy that can be swiftly activated in instances of health, security, climatic and other disasters within the region, which may affect travel and tourism perceptions of clients and may taint the image of the region. This should include a communications protocol on issuing communications, media interaction, a strategy for proactively communicating facts, communication approval processes, etc. Such protocol should be formulated in synergy with existing SADC Disaster Management and Early Warning Systems. 	Implement
	<ul style="list-style-type: none"> Set up a crisis communication action group of Member State representatives to swiftly react and implement the crisis communication strategy and where necessary, provide training in crisis management for Member State tourism organisations. 	Facilitate
	<ul style="list-style-type: none"> Align the activities of the appointed PR provider to include potential crisis communication and link this to the overall regional communication strategy. 	Implement

Strategy 2.2	Sustainable Southern Africa Programme	Role
Rationale	Since environmental integrity, cultural authenticity and social equity are at the core of the SADC tourism identity, sustainable tourism management should be strengthened and expanded to include the broader tourism industry and become a cornerstone of the regional positioning and image.	
Programme Activity	<p>1. Promoting sustainable tourism management: There are various tourism sustainability policies, guideline frameworks, assurance schemes and labels available regionally and internationally. TCU will advocate and promote sustainable tourism management among Member States and will make available to Member States the latest information and suitable guidelines regarding sustainable and responsible tourism management. Actions will include:</p>	
	<ul style="list-style-type: none"> Establish a tourism sustainability action group, consisting of nominated representatives from member countries, which will meet on a regular basis to pursue the formulation and adoption of regionally accepted sustainable tourism guidelines and other initiatives regarding sustainability. 	Facilitate
	<ul style="list-style-type: none"> The action group, with the support of TCU, to study and conduct information exchange workshops regarding various Member Country and international systems and based on the findings, formulate a suitable SADC policy and guidelines for Sustainable Tourism, to be adopted by the Committee of Tourism Ministers as a formal position on sustainable tourism management. Guidelines should consider and build on work previously done by RETOSA. 	Implement
	<ul style="list-style-type: none"> Promote and advocate the guidelines among Member States and encourage Member State tourism authorities to engage with their partners in public and private sectors to adopt the guidelines and advocate sustainable tourism management within their constituencies. 	Advocate
Programme Activity	<p>2. Promoting Universal Access in tourism: Everyone, regardless of any form of disability should have access to tourism sites and experiences. The average aging of travellers in key markets and the latent market of people with disabilities requires of destination governments and service providers to implement the required infrastructure and facilities for ensuring universal access in their destinations. SADC will:</p>	
	<ul style="list-style-type: none"> Formulate a set of internationally accepted guidelines and principles for ensuring Universal Access in tourism, based on work previously done by RETOSA and member countries and communicate and circulate these to Member States. Member countries will be encouraged to formulate their own policies and practices for advancing UA among tourism product owners and facility providers in their destinations and for promoting UA properties and facilities in marketing messages and information. Such guidelines should be sensitive to cultural traditions and potential stigmatisation of UA in the region. 	Implement and Advocate
	<ul style="list-style-type: none"> Promote and advocate the guidelines among Member States and encourage Member State tourism authorities to engage with their partners in public and private sectors to adopt the guidelines and advocate UA management within their constituencies. 	Advocate
	<ul style="list-style-type: none"> TCU will include the aspect of UA in tourism in workshops on sustainable tourism management and in tourism educational and skills development initiatives. 	Facilitate

5.3 GOAL 3: DEVELOPING TOURISM IN TRANSFRONTIER CONSERVATION AREAS

The following strategies will be pursued towards achieving this goal:

1. TFCA Market Development Programme with 3 Programme activities
2. Investment Facilitation Programme with 2 Programme activities
3. Rural Economic Inclusion Programme with 3 Programme activities

The strategies and Programme activities for each are described below.

Strategy 3.1	TFCA Market Development Programme	Role
Rationale	The development and promotion of tourism in TFCAs provides a tangible opportunity for optimising tourism opportunities based on natural and cultural resources of TFCAs in a market-related manner, through packaging and promoting cross-border tourism itineraries, experiences, events, etc. Through, and/or in association with Boundless Southern Africa (BSA), SADC will play a direct product development and marketing role in advancing tourism growth in TFCAs to the benefit of multiple Member States. While TFCAs are all currently located on mainland Africa every effort should be made to expand the concept the Indian Ocean Island Member States and to involved representatives of such Member States in the TFCA initiatives proposed below.	
Programme Activity	1. Formulating a well-researched market development strategy for TFCAs: The TFCA Market Development Programme will consider three key factors i.e. a) the enabling environment for sustainable tourism to flourish, b) demand creation and c) development of attractions and products. In this regard BSA will:	
	<ul style="list-style-type: none"> • Assess progress made and outcomes achieved in BSA Phase 1 strategy, identify gaps and successes and incorporate lessons learnt during Phase 1 in expanding towards Phase 2. 	Implement
	<ul style="list-style-type: none"> • Review the BSA Phase 2 strategy and formulate a well-researched, practical and implementable marketing strategy for TFCAs, indicating a clear market positioning for each TFCA, market segments and products that will be promoted and developed to underpin the positioning and a suitable marketing and promotional mix. The strategy should be based on a segmented understanding of the needs, requirements and travel patterns of domestic (i.e. national), regional and international tourism source markets and should give priority to areas that are ready to take to the market in respect of access, accommodation, amenities, attractions and activities. It should consider TFCAs within the broader context of neighbouring regions that do not fall within the technical boundaries of TFCA, but may be linked to the value chains of TFCAs. The strategy should be signed off by all key stakeholders including relevant Government Ministries, local authorities, agencies, TFCA structures, NGOs and CBOs. 	Implement
Programme Activity	2. Expanding TFCA marketing drive: TFCA destinations are generally poorly known and promoted, both regionally and internationally. While a few TFCAs like Kgalagadi TFCA, Ai-Ais-Richtersveld TFCA and to some extent the Greater Limpopo TFCA have made inroads in growing the cross-border tourism market, the majority of TFCAs are poorly advanced from a tourism perspective. BSA will work with Member State tourism organisations to:	
	<ul style="list-style-type: none"> • Develop suitable marketing tools at both the umbrella BSA level and for individual TFCAs, with an emphasis on digital marketing collateral (such as an attractive and interactive website, social media accounts and pages, e-newsletters, etc.) but also including traditional marketing approaches such as exhibiting at suitable travel trade and consumer exhibitions and fairs. 	Implement
	<ul style="list-style-type: none"> • Conduct and travel trade and media educational trips to expose selected and tour operators and agents servicing target markets, to attractions, experiences and products on offer in TFCAs. 	Implement
	<ul style="list-style-type: none"> • Conduct a focused online media drive through social media (especially Instagram and Facebook) showcasing exceptional, breath-taking scenes and nature and culture occurrences to create viral traction of the attractiveness of TFCAs. TFCA Member State tourism bodies will be an integral part of the campaign and will use their marketing channels to promote and distribute campaign messages and imagery. 	Implement

Strategy 3.1	TFCA Market Development Programme	Role
Programme Activity	<p>3. Developing and promoting cross-border routes and itineraries: Since BSA is not in the tourism sales business, i.e. it is not a tour operator but rather a facilitator for private sector to take up opportunities in TFCAs, the organisation will work closely with individual TFCAs, complementary destinations (e.g. coastal areas and Indian Ocean Islands) and private tourism operators to package and sell cross-border tourism experiences and activities. As such BSA will:</p>	
	<ul style="list-style-type: none"> Build and formalise strong, sustainable partnerships with tour operators and facility providers in the region, to expand their offering to include TFCAs. BSA will play a facilitating role in advising suitable operators on which itineraries and experiences could be taken to market and by exposing operators to such potential itineraries through familiarisation trips. 	Facilitate
	<ul style="list-style-type: none"> Pay specific attention to packaging and promoting maritime route developments among the Indian Ocean islands and linking mainland routes with maritime routes (“Bush-to-beach”) 	Implement
	<ul style="list-style-type: none"> Map out suitable itineraries (routes, facilities, attractions, experiences) and ensure these are incorporated in digital (GPS) mapping systems; incorporate them on the website and other digital platforms; print maps to distribute via vehicle rental companies and as inserts in off-road magazines; distribute them to tour operator partners; etc. 	Implement
	<ul style="list-style-type: none"> Through regular tour operator communication and surveys, raise specific challenges encountered by tour operators and individual travellers in respect of access, infrastructure, immigration, safety etc. with TCU, communicate to SADC structures and Member States and monitor progress. 	Facilitate/advocate
Programme Activity	<p>4. Supporting the development and growth of cross-border events in TFCAs: A number of exciting events (mountain biking, trail running, etc.) are already being staged in TFCAs, bringing with them much needed local revenue opportunities and publicity to these areas. BSA will support the growth and expansion of both terrestrial and ocean-based events in partnership with individual TFCAs and Member States and will:</p>	
	<ul style="list-style-type: none"> Conclude the formulation SADC TFCA guidelines on the development of cross-border events, to guide decisions on the type of events to canvas, the kind of support BSA is able to offer and how the best possible publicity can be derived from events. 	Implement
	<ul style="list-style-type: none"> Communicate the event development guidelines to stakeholders involved in the development and promotion of TFCAs through online channels, workshops, meetings, etc. 	Implement
	<ul style="list-style-type: none"> Assist event organisers with access to authorities, understanding event regulations and approval regulations and procedures and obtaining the necessary approvals. 	Facilitate
	<ul style="list-style-type: none"> Support events where possible through publicity coverage, online exposure and other possible channels and platforms. 	Implement

Strategy 3.2	Investment Facilitation Programme	Role
Rationale	The TFCAs are at various stages of their tourism life cycles and facilities and services are limited in most of these areas. Substantially more investment in infrastructure and hospitality services is required to create viable economies of scale, which can spin-off sufficient employment and income opportunities for locals. BSA will play a proactive role in canvassing private sector investment in TFCAs.	
Programme Activity	<p>1. Profiling TFCA Investment opportunities: While member countries promote investment in tourism infrastructure, facilities and services, a focused transfrontier investment programme will add momentum to achieve a more rapid increase in tourism facilities and services in TFCAs. BSA will:</p>	
	<ul style="list-style-type: none"> Canvas member countries involved in TFCAs to adopt TFCAs as Special Tourism Investment Zones within their tourism development plans and to adopt a consistent, investment friendly and attractive investment incentives schemes in such areas, under the umbrella of SADC. 	Facilitate/Advocate
	<ul style="list-style-type: none"> Work with Member State tourism and conservation authorities to conduct feasibility studies to establish what bankable projects can be implemented in identified TFCAs and document in a structured database format, potential tourism investment opportunities including locations, scale of investment, type/character of investment sought, procedures and regulations guiding investments, available incentives, etc. and in the process giving due consideration to differences in concession processes among Member States involved in TFCAs. 	Facilitate
	<ul style="list-style-type: none"> Conduct a marketing drive among targeted potential investors to showcase investment opportunities and solicit interest in developing products and services in TFCAs. 	Implement
	<ul style="list-style-type: none"> Encourage Member States with TFCAs to provide a “one-stop-shop” for investors interested in investing in TFCAs where they will be provided with advice, support and assistance for following the correct procedure and engaging with the right authorities to secure investments. 	Facilitate

Strategy 3.2	Investment Facilitation Programme	Role
Programme Activity	<p>2. Promoting and implementing the SADC Guideline on cross-border tourism products in TFCAs: Product development and investment approaches and regulations differ among the various member countries involved in TFCAs and this discourages investment. BSA will:</p>	
	<ul style="list-style-type: none"> Implement the SADC Tourism Product Development and Concession Guidelines for TFCAs. The TFCA Network has provided a clear process for guiding product development in TFCAs (and elsewhere in the region). BSA will apply the guidelines in selecting and unlocking tourism investment opportunities. 	Implement
	<ul style="list-style-type: none"> Develop an investors guide to investment in TFCAs, setting out regulations, procedures, land tenure policies, etc. for investing in the various TFCAs. 	Implement

Strategy 3.3	Rural Economic Inclusion Programme	Role
Rationale	<p>Communities in and round TFCAs are critical stakeholders and partners in the successful development of TFCAs and every effort should be made to secure their direct and indirect participation in the tourism value chain and to derive maximum benefits and opportunities for community members, in the interest of transformative economic inclusion. As already indicated tourism is multi-faceted, labour intensive industry with relatively low barriers to entry. Many communities (especially those in or adjacent to TFCAs) have access to unique natural and cultural resources and through tourism they can apply such assets to their advantage. Communities can also tap into the supply chains of tourism businesses and provide tourism businesses with goods and services such as fresh produce, repair and construction services and materials, transport, etc.</p> <p>The SADC TFCA community engagement guidelines document will be consulted as a resource and will serve as directives for advancing community empowerment in TFCAs.</p>	
Programme Activity	<p>1. Launching community-based tourism initiative for TFCAs: This will entail focusing tourism development in TFCA areas with rich and unique cultural lifestyle, traditions and events. The Programme will entail the following elements:</p>	
	<ul style="list-style-type: none"> Identify and select routes, destination areas and events in TFCAs as focal areas for community tourism development over 10 years, with the objective of launching two of these per year. The focus should be on establishment of tourism businesses as well as businesses that supply products and services to tourism businesses. 	Implement
	<ul style="list-style-type: none"> Identify relevant community structures, NGOs, private companies and other relevant support organisations and garner support and commitment for development of cultural tourism along the routes, in the destination areas and as integral components of events in TFCAs. 	Implement
	<ul style="list-style-type: none"> Set up route/area forums consisting of community representatives, private operators and authorities as mechanisms for discussing and mapping out action plans for developing the routes. 	Implement
	<ul style="list-style-type: none"> Conduct product and skills development and training workshops with interested and affected parties to come up with feasible product development and eventing concepts for the areas. 	Implement
	<ul style="list-style-type: none"> Agree sustainable business models (see point 2 below) and governance structures for such community-owned enterprises and support communities in setting up well-organised, thriving and legally sound structures. 	Facilitate
	<ul style="list-style-type: none"> Work with route/area forums in devising a basic but clear area development plan for each of the areas and events identified. 	Implement
	<ul style="list-style-type: none"> Incorporate cultural tourism developments in the TFCA marketing strategy, obtain commitment of private sector, relevant country Departments and various interested and affected parties to support and implement the development plans, commence implementation and promote the products. 	Advocate
Programme Activity	<p>2. Promoting operational guidelines for community product development: Development of community-owned or based products and experiences (e.g. local accommodation/homestays, cultural performances, local excursions, etc.) should be of a suitable standard and quality to enhance and support the TFCA brand that offers authentic, eco-friendly and quality experiences. In this regard BSA will:</p>	
	<ul style="list-style-type: none"> Draw on work that has been done and available literature to formulate a basic set of operational guidelines and standards, which it will recommend enterprises should adhere to. These could include business planning guidelines to ensure sustainable and viable business model for CBT, safety, hygiene, facilities, equipment, linen, furnishings, roadworthiness of vehicles, service etiquette, communication, etc. 	Implement
	<ul style="list-style-type: none"> Apply these guidelines in training and capacity building Programmes (see below). 	Implement

5.4 GOAL 4: IMPROVING QUALITY OF VISITOR EXPERIENCES AND SATISFACTION LEVELS

The following strategies will be pursued towards achieving this goal:

1. Visitor Safety and Well-being Programme with 3 Programme activities
2. Quality and Facility Improvement Programme with 3 Programme activities

The strategies and Programme activities for each are described below.

Strategy 4.1	Visitor Safety and Well-being Programme	Role
Rationale	Safety and health risks are major risks and such concerns prevent many travellers from exploring Southern Africa. Concerns and perceptions regarding poor security, huge health risks, bribery, piracy at sea, harassment, low hygiene standards etc. are common in major source markets such as Europe, USA and elsewhere and are often further entrenched by poorly informed media reporting (see 2.1 Image Communication Programme).	
Programme Activity	1. Engaging the SADC Organ on Politics Defence and Security: Security forces and institutions are often not adequately informed and aware of the special security needs of travellers and the concerns of the tourism industry in this regard. To create a greater awareness of the safety and health needs of travellers SADC Tourism Programme engage the SADC Organ on a continuous basis to:	
	<ul style="list-style-type: none"> • Formulate a guideline manual on tourism safety and security in the region, including tourist policing, safety at border posts and airports, safety of tourists at sea (especially when traveling among and between Member State islands), treatment of travellers at road blocks and other safety check points, bribery and corruption, health risks and services, emergency support and evacuation requirements, swifter justice and court processes, penalties for crimes against tourists, victim support measures, education and awareness on the impact of tourist security of destination reputation, etc. The manual will include best-practice examples from other destinations in the region and globally, including practices of establishing dedicated Tourist Police units 	Implement
	<ul style="list-style-type: none"> • Present the findings to the SADC Organ to raise awareness and for the Organ and Member States to adopt relevant measures as recommended practice in the region, to employ suitable technologies to ensure integration of security processes and information and to consider implementing complaints processes and systems. 	Advocate
Programme Activity	2. Initiating a tourism anti-corruption drive: Tourist bribery, especially at control points such as border posts, security check points, traffic check points, etc. is a matter of concern in many SADC Member States and this has a very negative effect on the potential growth of especially the independent and self-drive tourism market segments. The SADC Tourism Programme will:	
	<ul style="list-style-type: none"> • Formulate a clear position on tourist bribery and tourism corruptive practices, to be submitted to the SADC Organ on Politics Defence and Security and the SADC Committee of Tourism Ministers for consideration and adoption as a regional policy position. This may include proactive measures to reduce the risk of bribery, such as cashless payment systems and other electronic control measures. The position paper will be submitted to the SADC Council of Ministers for endorsement. 	Implement
	<ul style="list-style-type: none"> • Advocate the application of policies and approaches contained in the position paper among SADC Member States security, immigration and tourism authorities and communicate the position widely within the regional tourism industry, through private sector and governmental tourism authorities. 	Facilitate/ Advocate
Programme Activity	3. Facilitating efficient visitor insurance systems: The nature and extent of visitor insurances when traveling to Southern Africa is variable and often unclear, especially for independent tourists. While the majority of international visitors can obtain personal travel insurances in their countries of origin, coverage of business liability insurances is not always clear and business insurance requirements differ among Member States. The SADC Tourism Programme will:	
	<ul style="list-style-type: none"> • Conduct a detailed investigation of the nature and extent of consumer and travel trade insurances available in key international and regional markets, insurance coverage and gaps, legal and regulatory shortcomings and areas where travel insurances can be enhanced. 	Implement
	<ul style="list-style-type: none"> • Submit findings and recommendations regarding minimum insurance requirements and gaps in this regard to the SADC Organ on Politics Defence and Security and the SADC Committee of Tourism Ministers for consideration and endorsement of recommendations. 	Advocate
	<ul style="list-style-type: none"> • Advocate the application of recommendations at both regulatory and business levels among Member State government departments and institutions, private sector organisations and tourism businesses. 	Advocate

Strategy 4.2	Quality Improvement Programme	Role
Rationale	Tourism facility and service quality and standards vary considerably among and within Member States. While it may not be practical and feasible to apply the exact same standards and quality criteria and systems within a region where development levels vary to the extent that they do in SADC, standards related to basic traveller necessities, expectations and ease of movement should be harmonised as far as possible.	
Programme Activity	1. Promoting harmonisation of facility and services standards: Tourism licensing, grading and classification system vary considerably among Member States. During its tenure RETOSA developed entry-level requirements and minimum standards at various star levels for a range of accommodation categories. These were originally introduced in 2011 and reviewed and adapted in 2016. The SADC Tourism Programme will:	
	<ul style="list-style-type: none"> Review and repackage (if necessary) the guidelines contained in the Southern Africa harmonized accommodation Star Grading and Classification standards and adopt these as the accommodation standards endorsed by SADC Member States. This should include criteria and standards for sustainable tourism management. 	Implement
	<ul style="list-style-type: none"> Conduct an audit of the nature and extent of quality standards initiatives and systems in member countries and promote the application and implementation of standards that are in harmony with the SADC grading standards. Such assessment should consider assessment capacity developed through “train-the-trainer” programmes conducted by RETOSA in Angola and Mozambique for grading assessor trainers. 	Implement
	<ul style="list-style-type: none"> Monitor progress with implementing suitable standards and grading and classification systems in member countries on an annual basis. 	Facilitate
Programme Activity	2. Promoting regional tour guiding standardisation and mobility: Currently tour guide registration and qualification requirements vary considerably among Member States. Overland cross-border tourism relies heavily of efficient tour guiding of travellers on regional itineraries and consistency in tour guiding should be encouraged among Member States. In this regard the SADC Tourism Programme will:	
	<ul style="list-style-type: none"> Assess the current state of tour guiding in Member States including tour guide registration, standards, qualifications and regulations, identify commonalities and gaps in approaches and formulate a harmonised tour guide registration approach that can be promoted to Member States that have not yet adopted or implemented tour guide registration systems. 	Implement
	<ul style="list-style-type: none"> With due consideration given to work that has already been done in the area of regional tour guide development, introduce a registered “SADC Regional Guide” accreditation, endorsed by SADC for guides that fulfil guiding standards in more than one member country and specifying for which countries guides are registered and qualified. Qualified guides should be able to use such accreditation to cross borders and act as guides in countries for which they are qualified. Special provisions should be included in such accreditation to require the inclusion of local site guides, which should be citizens of Member States visited, in cross-border guiding programmes. 	Facilitate
Programme Activity	3. Promote expansion of Internet connectivity in the region: The explosion in usage of mobile devices and applications for travel planning and enjoyment makes Internet connectivity a requirement, rather than a luxury for advancing tourism growth. The SADC Tourism Programme will:	
	<ul style="list-style-type: none"> Conduct research to determine the quality of tourist experiences in respect of online connectivity and how tourist expectations could be met in this regard. 	Implement
	<ul style="list-style-type: none"> Engage the SADC Cluster of Ministers responsible for Infrastructure and Services and Internet service providers to present findings and discuss possibilities of expanding high-speed internet access in the region, in collaboration with internet and mobile service providers. 	Advocate

5.5 GOAL 5: MAXIMISING TOURISM PARTNERSHIPS AND COLLABORATION

The following strategies will be pursued towards achieving this goal:

1. Tourism Sector Partnerships Programme with 2 Programme activities
2. Tourism Institutional Strengthening Programme with 4 Programme activities

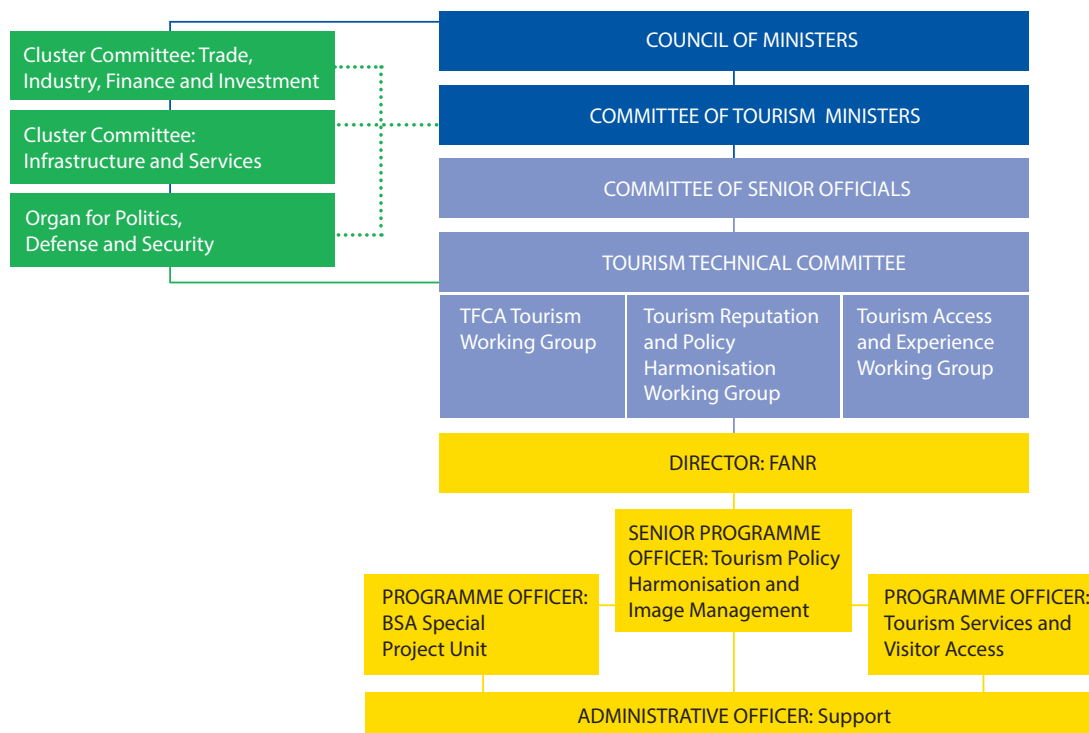
The strategies and Programme activities for each are described below.

Strategy 5.1	Tourism Sector Partnerships Programme	Role
Rationale	This Programme strives to maximise public, private and community partnerships and recognises that the success of the Programme is wholly reliant upon partners working in synergy, under the principles of tourism being government led, private sector driven and community based.	
Programme Activity	<p>1. Establishing suitable public-private Working Committees to steer implementation of the SADC Tourism Programme: While the TCU will be the operational institution for implementing the Programme, the various member countries should oversee and steer the implementation process. Member countries should nominate a mix of suitable public and private sector tourism professionals to serve on the working committees and should budget for their attendance of two or three annual committee meetings. Three working committees will be established, namely:</p> <ul style="list-style-type: none"> • The TFCA Work Group, which will be responsible for overseeing implementation of the TFCA Tourism Programme. • The Tourism Access and Experience Work Group, responsible for overseeing implementation of the Visitor Movement and Visitor Satisfaction Programmes. • The Tourism Reputation and Policy Harmonisation Partnerships Work Group, responsible for implementing the Image Management and Institutional Strengthening Programmes. 	Implement
	<p>2. Strengthening relations with relevant SADC Cluster Committees that affect tourism: Many of the initiatives contained in the Tourism Programme will require the participation and commitment to implementation of sectors other than tourism. The approval by the Council of Ministers in August 2017 of including the Ministers responsible for Tourism in the Joint Committee of Ministers of Environment and Natural Resources and of the Organ in Politics, Defence and Security Cooperation in order to improve ease of cross border travel and participate in efforts to combat wildlife crime, is a major step forward in recognizing the cross-sectorial nature of tourism. This principle will be further expanded to include interaction with other relevant SADC Clusters, especially a) Ministers responsible for Trade, Industry, Finance and Investment and b) Ministers responsible for Infrastructure and Services. The SADC Tourism Programme, through its relevant committees will:</p> <ul style="list-style-type: none"> • Recommend to the Committee of Tourism Ministers issues, aspects and studies that should be brought to their attention or should be discussed with other relevant Ministerial clusters. • Facilitate such interactions and/or engagements with other relevant clusters. • Monitor the potential impact of regulations made by other sectors on tourism and address regulations and procedures that may impact negatively on regional tourism growth. 	Facilitate/ Advocate
Programme Activity		Facilitate

Strategy 5.2	Tourism Institutional Strengthening Programme	Role
Rationale	<p>Currently the TCU is inadequately staffed for implementing the Tourism Programme. The situation should be addressed as a matter of urgency. Current status is as follows:</p> <ul style="list-style-type: none"> • The TCU is currently un-staffed. The current arrangement of giving a staff member of the TFCA unit the additional responsibility of looking after tourism has severely stretched the capacity and productivity of the tourism function and the situation is untenable. • Council called on Member States in August 2017 to second suitable staff to the unit. To date one country has indicated the intent of seconding a staff member, however the secondment has not materialised and it seems improbable that the secondment will become a reality soon. • The Joint SADC Ministers' Meeting of November 2017 has also recommended that ideally, the positions should be turned into permanent rather than seconded positions. However, this has not yet happened. 	

Strategy 5.2	Tourism Institutional Strengthening Programme	Role
Programme Activity	<p>1. Formalising the SADC Tourism Institutional Structure: The implementation of this tourism Programme is entirely reliant on the establishment of a suitable institutional structure for tourism. The Tourism Programme should also capitalise of work done in the past by RETOSA and incorporate relevant RETOSA initiatives in executing the Tourism Programme, so as to avoid “reinventing the wheel”. In addition to the cluster linkages and working committees proposed in 5.1 above, the following is proposed:</p>	
	<ul style="list-style-type: none"> Adapt the SADC Protocol on Tourism to provide for the structures as outlined below and have it approved by the Council of Ministers. 	Implement
	<ul style="list-style-type: none"> Wind up RETOSA as a matter of urgency. 	Implement
	<ul style="list-style-type: none"> Obtain all RETOSA records, documents and information pertaining to past research, initiatives and programmes undertaken by RETOSA and incorporate such work in executing the Tourism Programme. 	Implement
	<ul style="list-style-type: none"> Staff up the Tourism Coordinating Unit (TCU) under the Food, Agriculture and Natural Resources (FANR) Directorate, with functions as outlined in the original (1998) Protocol on Tourism, and including implementation of programmes and projects as outlined in SADC Tourism Programme. 	Implement
	<ul style="list-style-type: none"> The following permanent positions will be created: <ul style="list-style-type: none"> Senior Programme Officer:: Tourism Policy Harmonisation, Image Management and Secretariat, responsible for affecting the strategies and actions under Goals 2 and 5 and to manage the secretariat function of the TCU. Programme Officer: Tourism Services and Visitor Access, responsible for affecting the strategies and actions under Goals 1 and 4. Programme Officer: Boundless Southern Africa BSA, responsible for affecting the strategies and actions under Goal 3. Boundless Southern Africa will be a Special Project Unit, responsible for implementing the Transfrontier Conservation Areas Programme. As such, BSA will: <ul style="list-style-type: none"> Continue to be based at the premises of the South African Department of Environmental Affairs until 2022, with a suitable arrangement agreed thereafter. Continue employing the services of the current coordinator (Marketing Manager), with salary funded by the South African Department of Environmental Affairs for the duration of this Programme Continue its liaison with the TFCA Network, the Tourism Community of Practice and other Partners Report on its activities through the TCU and its structures Have a separate account allocation within SADC FANR that will allow it to generate sponsorships and form partnerships for funding activities Tourism Administrative Officer, to assist the Senior Coordinator: Sector Partnerships and Image Management with fulfilling the tourism Secretariat function 	

Fig. 10: Proposed Organisational Structure for Tourism



Strategy 5.2	Tourism Institutional Strengthening Programme	Role
Programme Activity	<p>2. Agree suitable “bridging” capacity for ensuring that the TCU functions effectively, while the proposed institutional structure is firmed up: It may take some time for SADC to staff up the TCU. Currently an officer who is also in charge of the TFCA programme manages the unit. The following arrangements are recommended to ensure continuity and momentum of Program implementation:</p>	
	<ul style="list-style-type: none"> Conduct a feasibility study regarding the proposed attachment of BSA to the TCU as Special Project Unit focusing on Goal 3 (Development of Tourism in TFCA), and if deemed feasible conclude attachment as soon as possible, with the current BSA staff as resources 	
	<ul style="list-style-type: none"> Move to fill the positions of Senior Programme Officer and Programme Officer on a permanent basis through SADC recruitment practices, as soon as possible 	
	<ul style="list-style-type: none"> While such staffing is being concluded, mobilise ICP support as “bridging” capacity. 	
Programme Activity	<p>3. Agreeing suitable funding of the Tourism Programme: Execution of this Programme will not be viable unless the TCU receives sufficient financial resources. In the past Member State tourism ministries paid special contributions to RETOSA for fulfilling its implementation role and this principal of proportional funding should be extended in a focused, project-related manner. In this regard:</p>	
	<ul style="list-style-type: none"> The TCU will develop three-year rolling business plans including estimated expenditure budgets, to indicate the resources required for implementing the Tourism Programme. 	Implement
	<ul style="list-style-type: none"> The tourism sector will continuously lobby for adequate budget allocation from SADC and Member States for the long-term implementation of the Tourism Programme. 	Advocate
	<ul style="list-style-type: none"> Every effort will be made to reduce operational costs through using new technologies like mobile communication platforms, online conferencing, etc. 	Implement
	<ul style="list-style-type: none"> The TCU and the other SADC tourism structures will engage with the donor community to fund specific elements of this Programme. 	Implement
Programme Activity	<p>4. Collecting and analysing tourism performance statistics and research: As the saying goes “one cannot manage what you don’t measure”. Collecting and analysing tourism data at regional level requires a collective effort among stakeholders. The TCU will liaise closely with UNWTO and Member States and will:</p>	
	<ul style="list-style-type: none"> Devise a quarterly barometer of tourism performance statistics based on indicators like airport passenger arrivals, visitor figures at key attractions, hotel occupancy and revenue figures, etc. 	Implement

6 Stakeholder Roles

The implementation of the Tourism Programme will rely heavily on the participation and contributions of a range of role players. The roles of the main stakeholders in implementing the Programme are outlined below.

6.1 MEMBER STATES

Many of programmes and initiatives highlighted in this Tourism Programme will only succeed if individual member countries participate fully in their implementation. Member State tourism authorities have the authority and collective responsibility for creating a suitable environment for tourism to flourish within their countries and across international boundaries, including (a) Policy Making and Planning; (b) Facilitation; (c) Coordination; (d) Regulation and Monitoring; (e) Destination Marketing and (e) Tourism Development.

Member States have the obligation to drive programme implementation at the national and local levels. They are required to establish appropriate institutional capacity for:

- Participating actively in formulating and executing SADC tourism processes and programmes.
- Ensuring that all tourism-related Ministries and agencies implement SADC policies and decisions in each Member State.
- Engaging and encouraging the private sector in their respective countries to contribute to SADC plans and programmes and to invest in and operate cross-border tourism businesses.
- Engaging local communities located in and around border areas in their countries to participate in and benefit from cross-border tourism flows.
- Contribute financially to the execution of the SADC Tourism programme.

National Tourism Focal Points should be designated as coordinating points for communication regarding implementation of the SADC Tourism Programme.

Member States should budget for this Programme at a national level, while lobbying for additional financial and technical support from the private sector.

6.2 PRIVATE SECTOR

The private sector plays a key role in the development and promotion of tourism. This involves the provision and management of facilities to accommodate, transport, feed, entertain and otherwise care for tourists. The delivery of value-for-money services is largely its responsibility. The commercial acumen and effort of entrepreneurs, investors, managers and workers in the private sector will be needed to drive tourism forward in the coming years and reach the Programme goals. Specific functions include:

- Participate in planning and policy-making for tourism at national and SADC levels, so as to inform and enhance tourism initiatives.
- Invest in the development of cross-border tourism products and services.
- Operate and manage commercial facilities effectively and profitably.
- Promote and sell commercial services.
- Employ local persons.
- Up-skill employees either through on-the-job training or arranging for external coaching/training, in support of harmonized regional service levels.
- Provide products and services of a quality to meet or exceed expectations of clients.
- Implement socially and environmentally responsible tourism.
- In collaboration with the government and other private sector members, ensure the safety and security of visitors.
- Provide visitors with appropriate tourism, health and safety information.
- Collaborate with public sector bodies and other stakeholders in marketing and promoting cross-border tourism e.g. by supporting and participating in regional communications and branding.
- Support local communities through out-sourcing, purchase of goods and services, and sales of handicrafts.
- Collaborate with fellow businesses in private tourism associations, so as to speak with one voice.

6.3 NGOS AND ICPS

Non-governmental Organisations (NGOs) working in the tourism, conservation, rural development and other tourism-related areas are important partners of the Tourism Programme as they complement government efforts and provide conceptual guidance, planning support, technical assistance and financial resources. Existing partnerships need to be further solidified and new ones should be nurtured with the roles and responsibilities of the NGOs clearly articulated. Their cooperation should be aligned with the objectives of the SADC Tourism Programme. NGOs should be afforded the opportunity of participating in the execution of the SADC Tourism Programme through being invited to or coopted onto the Working Groups of the Programme, as deemed necessary.

Similarly International Cooperating Partners (ICPs) should, where appropriate, be included in deliberations and efforts to execute the Tourism Programme.

6.4 COMMUNITIES

Community-based Organisations (CBOs) are important partners both to benefit from and contribute to SADC efforts of realising the potential of tourism. Their roles in sustainable, cross-border tourism development are, among others as follows:

- Establish community organisations and interest groups to play effective roles in tourism.
- Improve capacities of members to engage in tourism.
- Exploit opportunities for tourism training and awareness.
- Discover opportunities for finance and incentives in support of tourism.
- Interact with government and others involved in tourism.
- Create partnership opportunities with tourism businesses.
- Where viable, participate in tourism business.
- Identify resources and attractions suitable for tourism development.
- Participate in the promotion and development of responsible tourism.
- Reject and oppose developments that may be harmful to the local environment and culture.
- Participate in decision-making in local tourism developments planning.
- Be a representative voice for local people in tourism structures and forums.
- Promote awareness of community tourism developments.
- Encourage media to promote local tourism events and happenings.
- Cooperate with NGOs in educating and engendering community awareness.

7 Implementation Plan

The Goals, strategies and projects contained in the Tourism Programme will require continuous review and implementation progress will be monitored continuously. The following table summarises the required implementation priorities and processes.

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Goal 1: Stimulating visitor movement and flows to and within the region					
Strategy 1.1: Immigration Facilitation Programme	1. Harmonising visas <ul style="list-style-type: none"> - Conduct an assessment of current visa processes, successes and constraints in SADC - Study of multiple country visa schemes - Present and approve phased plan of action - Set up Immigration Implementation Committee - Monitor Implementation 				Reduction in visa requirements Launch of multi-country visas Launch of Univisa
	2. Improving border posts <ul style="list-style-type: none"> - Formulate a best-practice guideline - Audit of main tourist border posts and identify gaps - Present to Immigration Implementation Committee - Member States to implement - Monitor progress 				Dedicated tourist facilities and procedures at key border posts
	3. Improving immigration services <ul style="list-style-type: none"> - Develop a tourism-focused Customer Service Training Programme - Promote harmonisation of service standards and visitor welfare at border posts - Develop communication materials and methods for promoting tourist anti-bribery 				Improvement in tourist satisfaction ratings
Strategy 1.2: Air and Road Access Improvement Programme	1. Improving air access policies and practices <ul style="list-style-type: none"> - Conduct a comparison of air access policies and practices - Conduct a best practice benchmark study - Present and distribute findings - Track progress on air access and growth 				Growth in number and frequency of international flights from key markets to Member States
	2. Harmonising tourism customs costs and requirements <ul style="list-style-type: none"> - Conduct a comparison of Member States vehicle entry policies, costs and practices among - Engage the Southern African Customs Union (SACU) on their policies and integrate in SADC tourism position - Set standards for cross-border rental cars and agree affordable custom tariffs - Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services - Monitor changes and improvements 				Extent of reduction and simplification of customs processes and costs in Member States
	3. Improving priority tourism roads <ul style="list-style-type: none"> - Update the SADC Regional Infrastructure Development Master Plan - Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services and advocate for implementation - Monitor progress 				Kilometres of key tourism access roads paved or hardened and maintained
	4. Improving road and interpretative signage <ul style="list-style-type: none"> - Draft a regional guideline manual for tourism road signs provision - Present and distribute findings to SADC Cluster of Ministers responsible for Infrastructure and Services - Promote the provision and signage of rests stops along major regional highways - Offer a regional training course on tourism road signs practices 				Number of Member States that have adopted and implemented international road signs system

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Strategy 1.3: Human Resource Mobility Programme	1. Harmonising regional qualification recognition and training accreditation systems <ul style="list-style-type: none"> - Conduct a comparative assessment of tourism skills systems in Member States - Engage the SADC Cluster for Social and Human Development and Special Programmes in a discussion towards improved harmonisation - Collaborate to develop a regional skills training exchange Program 				Number of Member States that have agreed to harmonised qualification standards Number of students on exchange programme
	2. Harmonising work permit policies <ul style="list-style-type: none"> - Conduct a comparative assessment of work permit regulations - Engage SADC Cluster of Ministers responsible for Social and Human Development and Special Programmes in a discussion towards liberalisation and harmonisation of work permits 				Number of Member States that have agreed to liberalising and harmonising work permit policies
	3. Ensuring greater tourist guide mobility <ul style="list-style-type: none"> - Conduct a comparative assessment of tour guiding registration and entrance regulations - Present results to Tourism Committee of Ministers and adopt the position paper as a SADC approach 				Number of Member States that have agreed to and implement a harmonised approach to cross-border tour guiding

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Goal 2: Improving and defending the tourism reputation and image of the region					
Strategy 2.1: Image Communication Programme	1. Formulate a regional tourism communication strategy <ul style="list-style-type: none"> - Establishing digital communication platforms - Establish a www.southernafrica.travel website - Establish a Twitter account - Establish a Facebook page - Establish a Southern Africa tourism blog - Develop, maintain and update 				Successful launching of digital platforms Growth in website and social media analytics
	2. Conducting a regional Public Relations Programme <ul style="list-style-type: none"> - Appoint a qualified PR company and implement - Link all communication messages and releases to SADC and Member State digital platforms and communication systems 				Value of positive media coverage achieved due to PR actions
	3. Developing a crisis communication strategy <ul style="list-style-type: none"> - Formulate a crisis communication strategy - Set up a crisis communication action group - Align the activities of the appointed PR company to include crisis communication 				Crisis communication strategy adopted Case studies of successful implementation
Strategy 2.2 Sustainable Southern Africa Programme	1. Promoting sustainable tourism management <ul style="list-style-type: none"> - Establish a tourism sustainability action group - Study various systems and formulate a SADC guidelines for Sustainable Tourism - Committee of Tourism Ministers to adopt - Promote and advocate the guidelines - Arrange an annual series of workshops on sustainable tourism management 				Action group established Sustainable Tourism Guidelines adopted Number of workshops and attendees
	2. Promoting Universal Access in tourism <ul style="list-style-type: none"> - Formulate guidelines for ensuring Universal Access and communicate to Member States - Promote and advocate the guidelines among Member States - Include UA in tourism in workshops on sustainable tourism management 				UA Guidelines developed Number of workshops and attendees

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Goal 3: Developing Tourism in Transfrontier Conservation Areas					
Strategy 3.1: TFCA Market Development Programme	1. Formulating a well-researched market development strategy for TFCAs <ul style="list-style-type: none"> - Assess progress made and outcomes achieved in BSA Phase 1 - Review BSA Phase 2 strategy and formulate marketing strategy 				Marketing strategy formulated and adopted
	2. Expanding TFCA marketing drive <ul style="list-style-type: none"> - Develop suitable marketing tools - Conduct travel media and travel trade educational trips - Conduct a focused online media drive 				Successful launch of marketing tools Number of operators and media exposed Growth in online media analytics
	3. Developing and promoting cross-border routes and itineraries <ul style="list-style-type: none"> - Build and formalise strong, sustainable partnerships with tour operators and facility providers in the region - Map out suitable self-drive itineraries (routes, facilities, attractions, experiences) - Pay specific attention to packaging and promoting maritime route developments among the Indian Ocean islands - Raise challenges with SADC structures and Member States and monitor progress 				Number of self-drive routes launched and operational
	4. Supporting the development and growth of events in TFCAs <ul style="list-style-type: none"> - Devise a basic events strategy - Assist event organisers with organising - Support events where possible 				Growth in number of events in TFCAs Growth in event participation Extent of local level event expenditure
Strategy 3.2: Investment Facilitation Programme	1. Profiling TFCA Investment opportunities <ul style="list-style-type: none"> - Canvas member countries involved in TFCAs to adopt TFCAs as Special Tourism Investment Zones - Work with member country tourism and conservation authorities to establish a database of potential tourism investment opportunities - Conduct a marketing drive among targeted potential investors - Serve as a “one-stop-shop” for investors 				Number of Special Tourism Investment Zones established Database of investment opportunities established Value of new tourism investments in TFCAs
	2. Promoting and implementing the SADC guideline on cross-border tourism products in TFCAs <ul style="list-style-type: none"> - Implement the SADC Tourism Product Development Guidelines for TFCAs - Develop an investors guide 				Number of cases where the Guideline has been applied Extent of usage of investors guide
Strategy 3.3: Rural Economic Inclusion Programme	1. Launching community-based tourism initiative for TFCAs <ul style="list-style-type: none"> - Identify and select routes and destination areas in TFCAs as focal areas for CBT - Identify relevant partners for development of cultural tourism along the routes and in the destination areas. - Set up route/area forums - Conduct product development workshops - Agree sustainable business models and governance structures - Work with route/area forums in devising development plan for each of the areas. - Incorporate cultural tourism development in the TFCA marketing strategy 				No. of route forums established No. of workshops held Number of cultural products/ experiences in tour operator itineraries
	2. Promoting operational and standards guidelines for community product development <ul style="list-style-type: none"> - Formulate a basic set of operational guidelines and standards - Apply these guidelines in training and capacity building Programmes 				Guidelines launched No. of instances where guidelines successfully applied

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Goal 4: Improving quality of visitor experiences and satisfaction levels					
Strategy 4.1: Visitor Safety and Well-being Programme	1. Engaging the SADC Organ on Politics Defence and Security <ul style="list-style-type: none"> - Formulate a guideline manual on tourism safety and security in the region - Present the findings to the SADC Organ to raise awareness and for the Organ and Member States to adopt 				Position paper developed and presented to Organ Position paper adopted by Organ and supported by Member States
	2. Initiating an tourism anti-corruption drive <ul style="list-style-type: none"> - Formulate a clear position on tourist bribery, harassment and tourism corruptive practices - Advocate the application of policies and approaches among SADC Member States 				Position Paper developed Extent of communication with Member States
	3. Facilitating efficient visitor insurance systems <ul style="list-style-type: none"> - Conduct a detailed investigation of the nature and extent of consumer and travel trade insurances available - Submit findings and recommendations to the SADC Organ on Politics Defence and Security and the SADC Committee of Tourism Ministers and advocate for the application of recommendations 				Clear findings regarding the need for additional travel insurances for SADC Number of Member States where additional travel insurances have been established
Strategy 4.2: Quality Improvement Programme	1. Promoting harmonisation of facility and services standards <ul style="list-style-type: none"> - Review and repackage the Southern African accommodation Star Grading standards - Conduct an audit of the nature and extent of quality standards initiatives and systems in member countries and training done by RETOSA - Monitor progress with implementing suitable standards and grading systems 				Southern African standards revised and repackaged Number of countries that are implementing suitable standards schemes Proportion of establishments successfully graded
	2. Promoting regional tour guiding standardisation and mobility <ul style="list-style-type: none"> - Assess the current state of tour guiding in Member States - Introduce a registered "SADC Regional Guide" accreditation scheme 				Number of Members States that adopt the Regional Guide accreditation scheme Number of guides accredited
	3. Promote expansion of Internet connectivity in the region: <ul style="list-style-type: none"> - Conduct research in respect of tourism online connectivity - Engage the SADC Cluster of Ministers responsible for Infrastructure and Services to present findings and promote expansion of Internet Connectivity 				Extent of expansion of internet access and bandwidth, especially in key in tourism areas

Strategy	Programme Activities	Years			Success indicators
		1-3	4-6	7-10	
Goal 5: Maximising tourism partnerships and collaboration					
Strategy 5.1: Tourism Sector Partnerships Programme	1. Establishing suitable public-private working committees to steer implementation of the SADC Tourism Programme, including: <ul style="list-style-type: none"> - Existing TFCA network responsible for overseeing implementation of the TFCA Tourism Programme. - The Tourism Experience Working Group - The Tourism Reputation and Partnerships Working Group. 				Working Committees successfully established and operational
	2. Strengthening relations with relevant SADC clusters committees <ul style="list-style-type: none"> - Recommend to the Committee of Tourism Ministers issues to be discussed with other relevant Ministerial clusters - Facilitate such engagements 				Number of engagements with other SADC Clusters
Strategy 5.2: Tourism Institutional Strengthening Programme	1. Formalising the SADC Tourism Institutional Structure <ul style="list-style-type: none"> - Adapt the SADC Protocol on Tourism - Wind up RETOSA - Set up a Tourism Coordinating Unit (TCU) - Create permanent positions as per proposal, including BSA as Special Project Unit 				Protocol on Tourism adapted TCU staffed up Permanent staff structure established
	2. Agreeing suitable “bridging” capacity for ensuring TCU functions effectively, while institutional structure is firmed up <ul style="list-style-type: none"> - Conduct feasibility study regarding the attachment of BSA to the TCU - Move to fill at least the position of Senior Programme Officer on a permanent basis - While such staffing is being concluded, apply the position of Team leader (Senior Expert) created by TUPNR support programme as “bridging” capacity 				BSA formally attached to TCU Senior Programme Officer position filled Senior Expert of TUPNR project formally attached to support TCU
	3. Agreeing suitable funding of the Tourism Programme <ul style="list-style-type: none"> - TCU to formulate three-year rolling business plan - Lobby for adequate implementation budget - Use new technologies to reduce costs - Engage with the donor community to fund specific elements of this Programme 				Growth in SADC tourism budget Extent of Member State project funding Extent of donor support for Tourism Programme
	4. Collecting and analysing tourism performance statistics and research <ul style="list-style-type: none"> - Devise a quarterly barometer of tourism performance statistics 				Number of tourism barometer publications per annum

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