**Tourism concession guidelines for transfrontier conservation areas in SADC**

Guideline plan post review: 15 July 2014

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**1. OVERVIEW**

* **Working title:** Tourism concession guidelines for transfrontier conservation areas in SADC
* **Special / important features**:
  + Guidance on how to develop transboundary tourism products, procurement processes for transboundary investment, examples from SADC.
  + Include necessary related activities (e.g. policy/regulations; border control; fee sharing).
  + Product types focus on transboundary movement of tourists, but also refer to national processes/systems.
  + Guidance to align the goals and objectives of conservation agencies with the expectations of the private sector.
* **Main benefit of reading the guideline**: Basic guidance on how to develop transboundary tourism products and encourage investment in TFCAs.

**2. TABLE OF CONTENTS (WORKING)**

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| --- | --- | --- |
| **Section** (indicative length) | **Sub-sections** | **Materials** |
| Table of contents (1 page) | * Contents * Lists of figures, boxes, tables * Acronyms (keep to a minimum) |  |
| **Introduction**  (2 pages) | * Aim and principles of the guidelines * Important/special features, benefits of reading the guidelines * Scope and structure of the guidelines * Target audience |  |
| **Concessioning process** | Include diagram of the process and stakeholder roles |  |
| Step 1: Scoping  (2 pages) | * Establish goals, motivations, objectives * Concessions experience * Potential barriers to concessioning * When concessions to go ahead, and when not to |  |
| Step 2: Design and feasibility  (4-5 pages) | * Policy harmonisation/legal elements - Due diligence – national & site level * Land tenure types * Spatial planning * Product types (accom, event etc) * Concession model selection (PPP, CPPP etc) * Viability and market assessment * Development impact: Community costs and benefits; local $ retention * Risk | Examples: Tour de Tuli; Desert Knights ; Machampane |
| Step 3: Procurement strategy  (4-5 pages) | * Investment strategy, including target tourism markets * Transaction strategy: Private sector (tender or negotiated/unsolicited); PA authority * Development of transaction materials (e.g. EoI, RfP, checklists, marketing collateral) * Evaluation committee development |  |
| Step 4: Transaction management  (3-4 pages) | * Procurement process * Engagement with investors (promotion, negotiation, relationships) * Win-win deals * Contract content |  |
| Step 5: Contract management  (4-5 pages) | * Capacity and skills * Manuals (including M&E; service level agreements; standard operating procedures) * End of concession & next steps | Example: Kgalagadi TP fee sharing; IFC training course |
| **Further reading** |  |  |
| References | Citations from the text |  |
| Links | Weblinks to more information |  |
| Templates | EoIs, RfPs, tender review checklist, Standard Operating Procedures (borders, revenue sharing), |  |
| Specific country information | Legislation/policy in each country  Land tenure types in each country  Investment processes/protocols  Case studies/transboundary product examples | Boundless investment guide |
| Guideline development process | Method outline |  |

**3. DEVELOPMENT PROCESS AND TIMEFRAME**

|  |  |
| --- | --- |
| **Inception** meeting and report | Completed |
| **Scoping**– on format and style of guideline, and draft ToC | June/July |
| **Situational analysis** – information on concessions, processes and products in SADC currently | July |
| **Draft guideline development** – populating the ToC (version 1) | July |
| Translation (French, Portuguese) | July/Aug: 2 weeks |
| **Review period** for draft (English, French, Portuguese) via portal & email | 2 weeks: August |
| Revision of guideline (version 2) | August |
| **Conference** on concessions: review and improve the content of the guideline + annexes (Johannesburg) | 1-3 September |
| **Revision** of guideline (version 3) | September/Oct |
| **Validation meeting** with SADC/GiZ (Gaborone) | Oct or Nov |
| Finalisation of guideline (version 4) | Oct or Nov |

**Note:** If an additional step of online review is recommended on version 3 (including time for translation of the materials), this would add about 1.5 months to the process.

**4. MARKET**

* **Primary market:** TFCA coordinators; protected area authorities/ministries
* **Secondary market:** private sector interested in transboundary concessions, NGOs working with communities / on tourism in TFCAs

**5. STYLE/FORMAT**

* **Format:** Electronic (pdf)
* **Length:** 20-30 pages + annexes
* **Content:** Text, colour photos, tables, line drawings
* **Style:** Generic guidelines (simple, clear, concise), brief case study examples, end of chapter references/links

**6. DISSEMINATION**

* Distribution to SADC member states, their protected area agencies, and the SADC TFCA network via the portal and direct email
* SADC TFCA website
* Event at the World Parks Congress (Nov 2014)
* Via groups: WCPA Tourism and Protected Areas Specialist Group; WCPA Transboundary Specialist Group