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**Facilitating Opportunities And An Enabling Environment
For Investment In The Tourism Industry By Batswana
And Current / Resident Stakeholders.**

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for
DIRECTORS

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A EXECUTIVE SUMMARY

There has been political recognition by the Government that tourism will be an engine of growth and a means of diversifying the economy. This recognition has led to the

- the adoption of the country's first Tourism Policy Government Paper No.2
- preparation of the Tourism Act
- upgrading of the Tourism Development Unit to department status with its own budget
- establishment of the Trade Advisory Council and Licensing Board

However, implementation of the policy has mainly been in the areas pertaining to the regulation of the industry. There is no development policy for tourism in place as yet.

The industry is structured as follows:

- c) The commercial tourism product is focused in the North West of the country, principally the Chobe and Okavango, and marginal activity in the Tuli Block Nxai/Makgadikgadi areas. Business tourism is centred in the urban areas the east of the country.
- b) very few international or regional operators, these being Cresta Hospitality, Protea (replaced Sheraton), Sun International in business tourism; Orient Express and Ker and Downey in leisure, and Avis as a franchise in both sectors.
- c) the majority of operators are small operators, owner managed and owned by expatriates from Kenya, Zimbabwe and South Africa. HATAB has a membership of 86 companies, of which there only are a few operating companies owned by indigenous Batswana - Kanye Hotel (Kanye), Morning Star/Mphatlalatsane Motel (Gaborone), Botsalo Hotel (Palapye), Chobe Game Lodge (10%) (Kasane), Cumberland Hotel (Lobatse). On the leisure side, Guides and outfitters (Nata) Linyati Safaris (Okavango), Bushcamp Safaris (Maun).
- d) a small range of handicraft and veld producers, scattered throughout the country, with a relatively diverse product range.
 - woodwork from Etsha
 - pottery from Thamaga and Kanye
 - basketwork from Gumare
 - Ostrich egg jewellery from Gantsi District
 - weaving from Oodi
 - leather products from Francistown, Mochudi, and Xade
 - tinwork from Mochudi
 - taxidermy in Maun & Francistown

- veldfoods/medicine from Kgalagadi
- printed textiles from Francistown and Mochudi
- e) total number of employees in the hotel, lodges, and camps are 2 603 (1993 Tourism statistics). The number of people employed in linkage industries such as craft, veld products to support these efforts is currently unknown.
- f) in Botswana, it is guesstimated that 1 employee supports 11 family members.

Investment And Development Constraints

Generally there is little awareness and experience of tourism in Botswana, by Batswana, hence little participation in the industry as a career, profession, business venture, service provider, manufacturing supplier or regulating/enabling authority. There is a perception that it is an industry for, whites bringing their fellow whites to visit, with Batswana merely involved as junior employees.

Constraints to the current lack of investment and participation as managers and owners by Batswana include the following :

1. Identifying opportunities to enter tourism

Batswana want to be encouraged to enter the industry and empowered to identify opportunities through the provision of information, education and skills in this industry.

They want to understand the structure of the industry, how the industry operates and cost/benefit analysis at a household, community and national level. In this way, they will be able to find appropriate entry levels to the industry. Senior Govt officials are constantly speaking of tourism as the engine of growth through the public media, (policy) and people want more tangible information regarding how to find the key to start the engine, in an industry that is unknown to them.

2. The nature of the industry

The nature of industry, such as its current pattern of seasonality, fragile ecology in certain areas, limited size of the market and lack of breadth of the product, are not incentives to enter the market, however its high yield of financial returns and low entry barrier make it extremely attractive to knowledgeable potential investors. Opportunities exist to overcome these obstacles.

3. Securing land

Problems encountered in trying to access land mainly relate to

- a) Inefficiencies of current structures to deal with effectively providing land timeously.

- b) Conflicts of policies when it comes to the utilisation of land - cattle versus wildlife; lack of tribal land, as some communities are completely surrounded by Stateland and National Parks and are unable to develop or utilise, (in the case of National Parks) the latter; with regards to prime concession areas, a policy to maximise financial gain in the short term versus capacity building in the long term.
- c) it is difficult for the public to establish who is the ultimate authority for land, landlord or trustees of user rights thereon (landboard or wildlife).

4. **Sourcing finance**

The lack of an investment code and guidelines to attract external joint venture investors as encouraged by the policy, and the inability to access funds internally hinder development..

Difficulties encountered in trying to raise funds internally are

- a) not enough depth/variety of financial institutions and financial products providing long term development finance.
- b) lack of experience, creativity to source funds other than Govt.
- c) training to produce "bankable project" documents.
- d) lack of financial products for the small and medium sized entrepreneurs.

5. **Existing tour operations and the need for diversification**

There is a need to diversify away from the current product which is focused on hunting and photographic safaris. Other areas of opportunity within Botswana that can be developed for tourism include :

- 1) new " niche " market segments
 - domestic
 - regional
 - low & medium cost operators
- 2) new products such as
 - ecotourism, cultural, adventure, conference and conventions, mining, village, residential, entertainment, special interest, historical and archaeological tourism
- 3) linkage industries also offer export market potential, whilst internal markets need to be developed for the provision of raw materials and added value products.

6. Harmonisation of Government support

At a planning and development level there is a

- a) lack of an integrated approach and vision to tourism and wildlife development
- b) lack of quality consultation with relevant stakeholders
- c) emphasis on developing production led training/skill facilitation, without supporting facilitation to develop and create " markets"

7. Capacity building at a community level

To successfully operate as a partner in a joint venture, communities will be required to structure themselves to

- a) operate as a business entity and to be profit motivated as a community
- b) develop leadership skills to ensure implementation of community goals versus individual goals
- c) ensure the transfer of skills and technology and develop capacity
- d) ensure efficient distribution and utilisation of revenues generated by the joint venture on a sustainable basis
- e) manage individual and community expectations

8. Lack Of Confidence of Government development programmes

This arises from the failure/inaccessibility of many government programmes at a local level, and require improvement of a management nature, feedback & problem solving. Programmes initiated by NGO's are perceived to be more effective.

Quality consultation with communities must be made whereby communities must be told the nature of the problem, and offered possible solutions indicating the cost / benefit implications to ensure ownership and commitment for decisions taken.

9. Cultural Attitudes and Perceptions

Attitudes have developed due to

- a) a lack of experience of the tourism business
- b) the sociological environment

In conclusion :

The challenge facing participation and investment in tourism, will be to ensure a planned, sustainable, capacity led development programme - matched by the development of an appropriate enabling environment, development strategies and effective structures based the expectations of Batswana and other potential investors.

It will be important to ensure support, ownership and commitment to tourism by all stakeholders, particularly during what may be a youthful but contentious transition period, prior to the development of a long term masterplan.

1. CONSULTANCY OBJECTIVES AND METHODOLOGY

1.1 OBJECTIVES

- * To determine the constraints preventing the participation of Batswana and current / resident stakeholders from entering into the management and ownership of tourism enterprises.
- * Produce a manual that will assist in the provision of investment related information for prospective entrepreneurs.
- * Make recommendations on a possible institutional structure within HATAB, that may offer an investment advisory service.

The manual and recommendations on an institutional structure form separate documents to this report, which will deal with the identification and possible solutions to constraints. Solutions were put forward during the workshops held.

1.2 STRATEGY

The strategy utilised was to explore the potential for different tourist activities and linkage industries, within different geographical areas of the country and gain an understanding of possible investment and development constraints and opportunities. In managing expectations, suggested activities had to be achievable and realisable in the short term, and appropriate to the potential small and medium sized entrepreneur.

1.3 METHODOLOGY

The target markets for research included small, medium and larger scale operators in the private sector; community representatives and local authorities from the Chobe, Ngamiland, Central, Gantsi and Kgalagadi districts; Central Government officials from the Ministries of Finance, Commerce & Industry, Home Affairs, and Local Govt and Lands; and parastatals specifically the financial institutions.

Workshops were conducted in Gaborone - two, one day workshops for the private sector and Central Government; and two, three day workshops for local authorities and community representatives in Maun and Gantsi.

Interviews on an individual or group basis were conducted in Gaborone, Francistown, Maun and Gweta. The short-term study was over a two month duration.

2

STATUS OF IMPLEMENTATION OF TOURISM POLICY

In 1990, the Government released the country's first Tourism Policy Government Paper No. 2. The policy sets out to:-

a) **Regulate And License The Industry**

The explosive growth of the industry in the 1980's led to a proliferation of camps in the prime tourism area, the Okavango Delta. This brought the realisation that the country's main tourism asset, wilderness and wildlife, was not limitless and unless strict regulations were imposed could lead to the demise and eventual disappearance of the very tourism product it hoped to market.

A freeze was imposed on the issuance of leases until a land use plan was developed in consultation with the various stakeholders. This freeze has recently been lifted.

b) **Establish And Monitor Standards**

To ensure that minimum operating standards are established that will guide the visitor with regards to the type of facilities and services to be expected at the various locations.

c) **Provide Research And Planning Services**

Ensure that strategies and policies are made on an informed basis, and on a sustainable basis.

d) **Guide Training, And Improve The Quality Of Service Offered To The Visitor**

e) **Capacity Building To Ensure Greater Participation Of Batswana.**

Informally, as companies or as communities in the management and ownership of tourist enterprises.

f) **Ensure greater financial returns to the country from revenues generated by this industry.**

g) **Provide Employment, Particularly In Rural Areas.**

Tourism is a labour intensive industry, and utilises proportionately low -level-skill labour.

Implementation of the policy to date has mainly been in the areas pertaining to the regulation of the industry.

The Tourism Enterprise Licensing Board has yet to complete the regulations affecting the various sectors, prior to initiating licensing; and is hampered in delays arising from conflicting areas of the Act.

The Department of Wildlife and National Parks has completed land use plans for the Chobe/Ngamiland areas, is finalising the Makgadikgadi/Nxai Pan plans, and will go to tender in the future for the Central Kgagalagadi/Gemsbok/Mabuasehube Game Reserves.

In addition, the guidelines have been completed for the development of Community Joint Ventures, and a prototype - the Chobe Enclave is operational, mainly offering hunting safaris. The Department of Wildlife has taken a strategic decision to change its role from that of gamekeeper to that of a facilitator.

3. SITUATIONAL ANALYSIS

3.1 The commercial tourism product in Botswana

Geographically, leisure tourism in the country is focused in the Chobe, and Okavango; with marginal activities in the Tuli Block and Nxai/Makgadikgadi Pan areas. Business tourism is centred in the urban areas, particularly in the eastern area where there is the majority of commercial activities - Gaborone, Francistown, Selebi Phikwe/Serowe/Palapye and Lobatse region.

The product incorporates the following:-

- a) Accommodation sector - hotels, lodges, safari camps and a few bed and breakfast establishments.
- b) Air transportation - the national airline, and charter operations based predominantly in Maun and Gaborone.
- c) Ancillary facilities and services - boats, mekoro, car hire and camping equipment rental services in Maun.
- d) No ground handling services, and very little intermediary marketing services mainly in the form of travel agencies in urban areas.
- e) A small range of souvenir shops and handicraft producers, scattered throughout the country, with a relatively diverse product range.
 - woodwork from Etsha
 - pottery from Thamaga and Kanye

- basketwork from Gumare
- weaving from Oodi
- tinwork from Mochudi
- veldfoods from Gantsi District
- Ostrich egg jewellery from Gantsi
- leather from Francistown, Mochudi, Xade
- taxidermy in Maun and Francistown
- textiles from F'town & Mochudi

The main activity within the industry is focused on wildlife - both consumptive and non consumptive, mainly hunting and photographic safaris. Total expenditure for 1993 was P211 748 000. Turnover was P99 210 220, derived from accommodation, meals, bars and other. However the average daily expenditure declared per visitor is indicated as only P 47.75. (This low figure is probably what is spent in addition to the cost of the trip paid directly to tour operators). Foreign Exchange earnings for the same period were estimated at P170 million.

Botswana main tourism markets are:

<u>Leisure</u>	<u>No.</u>	<u>%</u>
United Kingdom	38 651	4.0
Germany	26 415	3.0
Italy/France	8 806	0.7
U.S.A.	12 848	1.3

Business/Leisure Combination

South Africa & Namibia	498 574	51.8
Zimbabwe	308 018	32.0

Total Botswana arrivals is 863 839. The average length of stay is 4.9 days.

The current level of economic impact of the whole industry is unknown , mainly due to the manner in which data is collected and collated. Published tourism statistics from the Central Statistics Unit relate only to the hotel, lodges and camps. Generally, there is insufficient statistical information relating to tourism as it is measured as part of general commercial / trading activities (specific statistics are needed which include all tourism sectors and linkage industries)

- The industry is structured with a)
- a) very few international or regional operators, these being Cresta Hospitality, Protea, Sun International, in business tourism; Orient Express and Ker & Downey in leisure and Avis as a franchise in both sectors.
 - b) the majority of operators are small operators, owner managed, and owned by expatriates who have come to Botswana from Kenya, Zimbabwe and South Africa. There are only a few operating companies owned by indigenous Batswana - Kanye Hotel (Kanye), Morning Star/Mphatlalatsane Motel (Gaborone), Botsalo Hotel (Palapye), Guides and Outfitter (Nata), Cumberland Hotel (Lobatse), Gaborone Hotel (Gaborone) ;Bodiba Hotel (Shashe), Chobe Game Lodge (10%) (Kasane), Linyati Safaris (Okavango), Bushcamp Safaris (Maun).

3.2 SWOT ANALYSIS

Strengths

- a) Reduction of casual camper influx in line with the intention of the policy
- b) Tourism Policy in place and recognition by Govt that it is an engine of growth
- c) Unique tourist product -Okavango Delta
- d) Diverse tourist products around the country
 - Chobe Wildlife
 - Tsodilo Hills Rock paintings
 - Kgalagadi Desert & National Park
 - Gemsbok National Park/Mabuasehube
 - Makgadikgadi/Nxai Pans
 - Tuli Block
 - Gcwinhabe Caverns
 - Interesting and diverse cultures
- e) Access infrastructure
 - Well developed Int. Airports and rural airstrips
 - Good roads - near completion of ring round within Botswana
- f) Good telecommunication infrastructure
- g) Developed accommodation infrastructure in urban areas
- h) Environmental protection : 17% of the country in the form of National Parks,
- i) Reliable utilities - electricity, water
- j) Central location in Southern Africa and in close proximity to Lost City; Zimbabwe, Zambia, Namibia, South Africa
- k) Good health and social services
- l) Secure country for tourists/low crime rate

Threats

- a) Pressure on natural resources
- b) Escalation of crime
- c) Lack of investment / financing options
- d) Over optimisation of yield by wrongly balancing numbers and average spend. Some operators diversifying operations by investing elsewhere
- e) Uncontrolled and explosive growth of tourism arising out of kick-starting the industry
- f) Possibility of poor planning - policies and strategies
- g) Corruption
- h) External economic forces

4. IDENTIFICATION OF CONSTRAINTS AND RECOMMENDATIONS

Generally there is little awareness and experience of tourism (understanding of the structure of the industry) in Botswana, hence limited participation in the industry as a career, profession, business venture, service provider, manufacturing supplier or regulating/enabling authority. As the industry has evolved the only participation of Botswana has been as junior employees in safari camps. Tourists arriving are restricted to wildlife areas with no contact with local people.

In order to enable the nation to take advantage of potential tourism opportunities, to direct their productive efforts towards the industry, or make informed decisions regarding regulating the industry, the following enabling environment is required:

4.1 Identifying Opportunities To Enter The Industry

Botswana would like access to future opportunities by being empowered through the provision of information, education and acquisition of skills.

Recommendations:

4.1.1 National Level :

The encouragement to enter the industry by the leadership:

All participants wanted tourism education to enable them to better understand concepts such as

- a) the value and benefit of the tourism Pula at a household level, community and national level; tourism in the long and short term. The industry multiplier effect at a community level.

- b) the value of cattle farming in addition/compared to tourism. Role models where communities are choosing tourism in preference to agriculture.
- c) linkage industries and how to diversify current efforts to service tourism.
- d) more effective utilisation of natural resources, and how to add value. The different resource utilisation options, benefits and conflicts.
- e) sustainable natural resource management and conservation. How to balance the two and compensate for the loss of livelihood during the transition.

Educate on the need for conservation not just for the sake of preservation only, but as a critical step in ensuring sustainable economic activity which will bring about direct benefits to the nation.

- f) with regards to influence of international lobby groups e.g. 'endangered species' and Elephant culling, and the role of CITES.

It was felt that the Government, with/without the assistance of NGO's, should be the prime initiator, in carrying out this task. This task could be carried out through:

- g) Educational seminars and interactive programmes with participants from different communities where they can share experiences and knowledge. The programmes must also interact with local authorities in a joint effort, adult to a adult relationship and not in a adult to a child / authority - minor relationship.
- h) Joint workshops between HATAB, Depts of Wildlife and Tourism, and communities to discuss tourism opportunities, and planning programmes. Opportunities would need to be quantified and qualified.
- i) Local resource personnel, such as Tourism & Wildlife Education Officers at a community level.
- j) Empowerment through training in business skills required for tourism (commerce and marketing), and technical skills oriented towards the industry.
- k) Facilitation of seminars teaching industry knowledge on opportunities and how to enter.
- l) Public awareness campaigns on tourism and developing a service culture, with the same intensity and effectiveness as the AIDS campaign.

4.1.2 Youth.

- a) Incorporate tourism subjects in syllabus such as ecology from primary to tertiary levels.
- b) Develop "business" programmes into secondary schools e.g.
 - encourage "small business competitions" at schools in association with sponsorship of prizes from the private sector.
 - business simulation courses/competitions in secondary and tertiary educational institutions and these to be industry specific.
- c) Develop sporting programmes which are ancillary to tourism e.g. hiking, guiding, culture, which will equip youth to enter the industry.
- d) Government should offer bursaries and incentives for tourism related professions. Remove current job-in-advance condition currently prevailing as nature of the industry ensures that graduands can be employed in the private sector or self employed as entrepreneur on completion at all levels of training.
- e) Introduce a dedicated training levy matched by the Government.
- f) Encourage emergence of privatised hospitality training institutions and organised acceptable and recognised standards within the industry.

4.1.3 Older Members of the Community

- a) Arrange seminars and workshops that interact with local authorities involved in tourism.
- b) Provide extension courses/Non-Formal education - education through pictures, videos to combat illiteracy in technical, business and craft skills (industry specific).

4.1.4 Local Authorities/Government

- a) Educate on "the tourism industry, its structure, and how it works" to facilitate skills to make informed decisions. Gweta councillors rejected the idea of a sanctuary when it was initially presented to them as a possible community opportunity, and it now is the Nata Sanctuary. Now, in retrospect, the community realises their lost opportunity.

- b) Need to educate to understand their roles and responsibilities e.g. Landboards to educate the communities with regards to landuse.
- c) Conduct a high level symposium for seminar civil servants to gain commitment and understanding regarding implementation and harmonisation of development effort. Currently Tourism is a low development priority. The symposium to be organised by the Dept of Tourism in co-operation with HATAB/BOCCIM.

4.1.5 Potential Entrepreneurs

- a) Relevant stakeholders - arrange seminars, workshops on the structure of the industry e.g. wholesalers, retailers, producers, support services, how and where to access markets.
- b) Provide up to date information relating to the markets - profiles, expectations, size, yield, characteristics, and future trends.
- c) Provide information where to access research conducted for tourism, and what areas of research is available, up to date and relevant statistical data e.g. Dept. of Tourism, Dept. of Wildlife and National Parks, University of Botswana Research facilities.

4.1.6 Scope Of Training In Tourist Industry

Ideally education and training in the tourist industry should cover the following areas:-

- a) **Lodging/accommodation:**
These include hotels, motels, campgrounds and resorts.
- b) **Transportation:**
Common means of transport used by tourists:
Airlines, trains, ferries, motorboats, mekoro, motorcoaches, taxis and rental cars.
- c) **Food and beverage:**
These are available at restaurants, coffee shops, motels, vendors and fast food outlets.
- d) **Attractions and events:**
These include museums, gardens, national (heritage) parks, theme (entertainment) parks.

- e) Outdoor recreation/activity oriented:
For example fishing, hunting, walking riding, canoeing, river rafting, hiking, golfing, water sports, flying and gliding.
- f) Convention and trade shows:
Examples are conferences, workshops, meeting facilities and convention bureau.
- g) Support Services:
These include government development, marketing, planning, regulatory policy, industry's associations and consulting/professional organisations.

4.2 Nature of the Tourism Industry :

Current problems inherent in the nature of the business which discourages local participation includes

- 4.2.1 Seasonality - currently does not offer year round employment
- 4.2.2 Managing capacity - Fragile nature of prime areas of the resource require small facilities to be ecologically sustainable.
- 4.2.3 Low cost & medium cost operators - financially not viable to source international markets.
- 4.2.4 Linkage industries, may require high sales volumes to be financially sustainable.
- 4.2.5 Managing the nature of the investment - as the product is service oriented and extremely sensitive to uncontrollable external factors such as media, trends. etc.
- 4.2.6 Consumption is at the point of manufacture- cannot export an " experience ".
Therefore there is need for the market to come to the point of manufacture.

Recommendations:

- 4.2.7 Develop and encourage activities that offer year round opportunities e.g. Niche markets such as adventure tourism in the Kgalagadi/Southern areas.
- 4.2.8 Develop land use plans to determine maximum carrying capacities nation wide - those areas that are not ecologically fragile and can sustain larger numbers to be encouraged to do so e.g. Casino's, Theme Parks etc. Develop a more diverse mix of tourism - low, medium and high cost, with the emphasis(90%) on high cost. Currently low and medium cost are less than 1 % of the total industry combined.
- 4.2.9 For low cost & medium cost operators - promote more accessible domestic and regional markets to match this segment. Do not require high levels of effort to market these and the demand is there. Revenue leakage's occur as

many Batswana visit Zimbabwe and South Africa which have a wider range of prices on accommodation. The majority of tourism enterprises world wide are owner managed, and began as small business run by a husband and wife team.

4.2.10 Linkage industries e.g. crafts. Develop export driven, holistic programme of incentives, particularly to assist in developing markets.

4.2.11 Develop integrated programmes that foster the development of a culture that matches resource demand and supply. Encourage aggressively, the commercialisation of support industries - e.g. Dept of Forestry and Agriculture to develop the cultivation of raw materials commercially to support added value vendors (Mokolwane forests to facilitate local 'export' for the woven basket industry; the same with the jewellery sector based on ostrich egg shells).

4.3 Securing Land:

For investors sourcing land for purposes of tourism development, the following are the relevant authorities to be contacted:

- a) The Department of Lands in Gaborone is which is responsible for state land, whether it is serviced, virgin or wasteland, residential or commercial. It has authority to allocate land nationwide.
- b) Landboards for tribal land, and concessions in wildlife management areas. The Landboard have jurisdiction over specific areas.

Problems with regards to trying to access land include:

Tribal land :

4.3.1 Who to approach with regards to the allocation of land for tourism/wildlife purposes.

Although the Ministry of Lands is responsible for allocating lands, in practise trying to establish the final decision maker is difficult as the Depts of Wildlife and Tourism have final authority on the use of the natural resources on that land; and even Town Council, or District Council may only have planning authority. Often confusing as the public is sent from pillar to post.

4.3.2 Time it takes to process applications.

There are numerous examples of Batswana that have applied for tribal land in the Ngamiland and Gantsi districts, (land which is not in the wildlife

management areas) and six months, two years,, and even ten years later are still awaiting decisions as to whether the land can be availed to them for tourist activities.

Some of these companies had sought joint venture partners, had finance in place and were only awaiting the allocation of land if successful. Till today they wait, with no official response to indicate that there is a problem with the application. Their joint venture partners have invested in other countries.

A vicious circle exists whereby in order to obtain financial/technical assistance from organisations like the Africa Project Development Fund (APDF), requires a feasibility study which cannot be undertaken prior to security of tenure.

4.3.3 Lack of tribal land in certain areas.

Certain communities such as the Gweta and Gantsi are 'islands', completely surrounded by State land, TGLP ranches, and National Parks on all boundaries. They do not have tribal land to be able to conduct tourist enterprises.

4.3.4 Forced removals of communities from their traditional lands for wildlife preservation purposes, without consulting the communities.

Communities have been removed from their tribal land in 1960 due to the demarcation of wildlife management areas and National Parks. Compensation for evictions was P120.00 only per household.

In certain areas where the community is refusing to move, e.g. Xade, the communities is questioning who is going to occupy that land after their eviction, and will the new occupants be allowed to develop non-consumptive tourism as planned for those areas.e.g. Central Kgalagadi Game Reserve. Can they not be educated on developing non-consumptive tourist activities rather.

4.3.5 Insider trading on land issues, and hoarding of land.

There is hoarding of land by people who have prior access to relevant land use information. These individuals have relevant information with regards to the economic value of various types of land, hence acquire the land purely for speculative purposes.

A concession area was recently irregularly advertised (March '95) through the official media, but the intended allocation was halted prior to the awarding of the lease and investigations are being conducted into the matter.

Stateland

4.3.6 Inability to secure rights and legality of tenure on stateland

There are strict regulations and procedures regarding development of stateland, and the financial costs to service, develop and process relevant requirements is costly and lengthy. Hence most cannot secure rights to use the land.

Secondly, there is the problem of protecting the investor against the lack of control that exists over illegal livestock owners who occupy the land and have a conflict of interest.

4.3.7 Lack of knowledge of physical boundaries by trustees of land.

There are increasing conflicts arising out of the demarcation of boundaries as these vary between what is on the books and actual on the ground e.g. Gweta are currently disputing co-ordinates. These boundaries are perceived to have been demarcated without consulting the communities.

Further, different government departments use different zoning and classifications for the same areas hence causing confusion at a community level e.g. the Dept of Wildlife and Dept of Forestry call similar areas by different classifications. Distinction is not made as to the ownership of the land, and trustees of the different user rights. Hence perceptions are created for example, that the Government has taken away tribal land without consulting the community and is giving it away to foreigners as concessions.

4.3.8 Prime tourism concessions areas / tender process.

A requirement in the tender process for controlled hunting/multiple use areas, and photographic areas is for a technical report with environmental and management impact studies. These reports are needed for both the prequalification and tender stages, and involve the recruitment of professional consultants. Consultant fees average P60 000 for the reports. These requirements are perceived to be intentional stumbling blocks to prevent Batswana from accessing these lands now some realise that the safari business is highly lucrative.

Recommendations

4.3.9 Provision of published information and dissemination to the public national associations, local authorities, embassies with regards to the correct procedures

and guidelines to access land; and correct authorities responsible for the relevant user rights, thereon. For example the Landboard is the correct authority for leasing the land, whilst the Dept of Wildlife is the correct authority for determining the utilisation of that land for wildlife activities.

4.3.10 A structure must be put in place to enable a potential investor to obtain a response to an application from one source only and not have to go between the two Govt. departments. For example, the TIPAs office could provide a service whereby it houses an official from the Dept of Lands who co-ordinates requests for land. The land official could even have a register of land immediately available for various tourism enterprises that is offered to the investor - development of an investment guide with available sites projected development costs could be produced.

4.3.11 Need for an accelerated land allocation process for tourism projects.

The issue is not that there is necessarily a waiting list at this current moment, rather a proactive attempt to improve the efficiency of allocations to this new engine of growth.

A policy must be put in place giving a time limit that applicants can expect a positive or negative response, than the norm of a few years. Tourism is a dynamic business and may involve external joint venture partners, which the policy encourages. Suggestions are a maximum of three months, preferably one month.

With regards to State land, it is recommended that manpower resources are acquired to assist the Department of Lands, Surveys and Attorney General's Chambers to process applications. Preferably, these services be decentralised to the local authority level to save Botswana the tremendous travelling expense currently involved in chasing up applications in Gaborone, from remote areas, over a long period of time.

4.3.12 In order to address these "Islands" there needs to be a review of land tenure system, and encouragement of large scale farmers to intensify production on smaller areas and thereby release land for other uses.

In addition, the Government may need to "tribalise" certain areas of the stateland to the communities.

4.3.13 The nature of the relationship between the Government and communities must change:- consultations must become more qualitative, and communities must be educated into the environmental and social planning process with local authorities. All stakeholders need to work together from the initial planning stage to ensure establishment of similar values, commitment and accountability.

- 4.3.14 Land should be allocated based on user rights, and if that land is not being utilised, the it should be allocated to an alternative user if required - based on our traditional communal land ownership principles. The Landboard should be subordinate to the Chief, as the Chief is aware of needs of his community.

Development incentives should be put in place to encourage landowners to develop their land within a short period and not to just hoard it. The present monitoring mechanism with regards to the development clause in leases is ineffective.

HATAB has offered its services to assist in vetting applicants from its own membership to curb land speculation, and assist in determining Bona fide tourism developers.

- 4.3.15 Increase security of tenure.

There is a need for more effective dissemination of information to local authorities of services available to assist applicants increase their security their security of tenure e.g. Title Deeds may be paid for over a four year period.

With regards to the controlled hunting areas and Wildlife management areas (concessions put to tender), long term funding agencies are not keen to lend finance on the basis of a 5 year renewable period. These institutions are looking for 20, 50, and 99 year leases which are secure for the entire duration of the leases.

- 4.3.16 Demarcation of boundaries should be planned in joint consultation with communities. Chiefs should be included in structures that involve boundaries.

In certain districts, there needs to be an improvement in the efficiency of structures that facilitate constant communication between all stakeholders - Chiefs, Depts of Wildlife, Tourism District Council, land authority and community representative.

There is also a need for the improvement of communication between Village Development committees and local authorities. Often, it is at this level that communication breakdowns.

Land authorities e.g. Landboards need to be made aware of their responsibilities and accountability in informing communities of land issues.

- 4.3.17 The Financial Assistance Policy should include the facility to enable the funding of environmental and social impact assessment studies, as these reports are for a highly speculative process. There may not be an opportunity to recoup these funds, and definitely commercial lending institutions will not lend money for business proposals that do not guarantee cost recovery.

4.4 Access to Finance

The Tourism Policy is geared towards low volume, high yielding markets, which invariably means that :

- 4.4.1 Sources of these high yielding markets in the northern hemisphere require first world promotional tools such as expensive brochures, videos, and personal visits.
- 4.4.2 The nature of tourism operation needed to cater for this market requires the acquisition of large amounts of capital to provide efficient air and ground transportation, ensuite facilities, permanent structures (for the less adventurous visitors), and environmentally friendly facilities.

Hence, setting up tourism operations to cater for this market requires acquisition of capital. Potential citizen entrants have technical skills but lack equity to set up tourism ventures.

Already noted above in 6.3 is the need for speculative finance to prepare environmental impact assessments for the tender process in concession areas.

There are very few development institutions such as development banks, corporations, venture capital companies or merchant banks in the country to assist entrepreneurs requiring long term funding.

In many countries, tourism is an industry for small people, with small businesses, requiring small capital - again, there are no financial facilities to assist the small businessman to enter tourism i.e. a licensed professional guide who wishes to purchase a 4x4 vehicle to provide 'game drives' or luxury coaches to provide ground transportation.

Recommendations

- 4.4.3 Govt to provide performance bond guarantees for the tourist enterprise to source capital. In addition, to provide guarantees and use cattle or game (privately owned) as collateral / financial incentive / financial reward for communities that are not based on a cash economy /activities. Botswana Development Corporation has such a prototype formula in place for collateral.

- 4.4.4 Need for creating more efficient information dissemination amongst rural dwellers to creatively access non governmental funds e.g. organisations such as the Africa Enterprise Fund, Armscor, APDF, provide equity guarantees.

The lack of options is seen as contributing to the 'dependency syndrome' hence Government is seen as the panacea.

- 4.4.5 Assisting Batswana to define "in a bankable form" tourism projects.
- 4.4.6 Encouragement of joint venture shareholding and partnership, to provide support during the incubation period. A proportionate grant could be awarded to joint venture partners that manage a successful transfer of skills and ownership.
- 4.4.7 Encouraging and educating the nation on consortiums, syndicates and pooling of financial resources.
- 4.4.8 Provision of consignment financing for commercialisation of export linkage industries. Finance to assist cash flow; and the preparation of professional sales and promotional literature.
- 4.4.9 Encourage the setting up of "seed capital" organisations within the country that will assist potential entrepreneurs.
- 4.4.10 To open up new tourist areas, particularly more difficult areas to develop, the Government could look at implementing a suitable incentive package as follows :
- a) Long term loans with low interest rates, and financial assistance up to 50 % of a project from parastatal development companies. Finally a buy out of the parastatal contribution by the joint venture partners.
 - b) Waiver of taxes over a five year period.
 - c) Waiver of duty / sales tax on all capital equipment (communication, transport, operational).
 - d) Pula for Pula match by Government on jointly agreed overseas marketing .
- 4.4.11 Need for published information, and education of local authorities, on
- a) the different sources of Government finance and incentives available to individuals, business and communities.

- b) conditions and requirements of these.
- c) relevant authorities responsible for these.

At a community level, there are information gaps with regards to advice on sourcing finance, and poor attitudes by officers concerned. Rural dwellers are unable to secure funds and therefore believe that they are being denied funds.

Secondly, there is need to review the regulations of certain Govt financial programmes and align with the local conditions. For instance, the Economic Promotion Fund guidelines for the minimum levels are not appropriate in the Gantsi District.

4.5 Existing tour operations and the need for diversification.

- 4.5.1 There is a perception that tourism in Botswana is wildlife based (the Big 5 - Lion, Elephant, Rhino, Buffalo, and Leopard) and centred in the Okavango / Chobe areas, which have attractive aesthetic natural features. As a result, there has been only a handful of new tourism entrants into the country over the last ten years, although the freeze on issuing tourism leases was only enforced for hunting and photographic concessions.
- 4.5.2 The tourism policy has identified the need to diversify the product both in terms of geographical locations and breadth of products, as part of a development strategy.

Cultural tourism is relatively low cost to implement at a community level, the main expense being promotional. However, a major constraint to the development of cultural tourism is the Governments acute sensitivity towards culture. The promotion of different cultural groups is perceived to promote tribalism, and ethnic diversity. With regards to the " Remote Area Dwellers " the cultural sensitivity arises out of the fear of patronising tourism activities, such as treating people like animals in a zoo, or through negative films such as " The Gods must be Crazy ".

The current sensitivity towards remote area dwellers means that

- Opportunities for film and advertising related tourism is hindered, and revenue generating opportunities lost. Either licenses are refused totally and production companies go to neighbouring countries; alternatively, licenses are issued but with restrictions i.e. to be a minimum of 15km from the nearest settlement. Communities loose the opportunity to provide accommodation, meals, crafts and photographic equipment, tours, vehicle hire, traditional dancing and employment for an equitable financial return.

The Remote area dwellers are keen on tourism as it is an area that allows the people a choice between some measure of retaining their traditional lifestyle and the possibility of joining the economy.

-Opportunities are lost for publicity and the development of a marketing image for Botswana.

-The development of culture means national pride and nation building, an opportunity cost to encourage a "Buy Botswana." Cultural tourism is sold successfully in Kenya, Zimbabwe, South Africa; the latter has the slogan "many cultures - one nation" the Masai of Kenya are famous; the traditional village at Victoria Falls, at Letlamoreng Dam/ in South Africa, boldly sell their different tribes.

- 4.5.3 Not enough manpower and financial resources are dedicated towards the development of Archaeological sites, museums, monuments, relics for tourism purposes. Most museums in the country have a insufficient recurrent budgets to implement their plans. In addition, there are manpower shortages (not enough positions? or not filled?) and a lack of continuity in projects as staff are transferred. Most museums are reliant on donor funds, which are drying up rapidly in Botswana.
- 4.5.4 Certain areas which are currently not accessible by road or air, or do not have constant supplies of water but have the potential to be developed into major tourism centres. There is a lack of ancillary services in certain areas, such as public camp sites in the Gantsi District.
- 4.5.5 Botswana shares a border with four different countries, thus giving her four "gateways " in terms of access by tourists into the country.

Recommendations

- 4.5.6 Develop 'nation building' programmes that facilitate the development of cultural tourism. Cultural tourism enhances local community esteem and provides an opportunity for greater understanding and communication among people of diverse background.
- 4.5.7 Empower communities to develop structures to manage cultural tourism:
For example
 - the development of infocentres which also serve as an entry point to the community area.
 - educating the community on charging market prices for performing cultural activities, without their being exploited.

- provision of information on tourist on brochures noting do's and don't's whilst in community areas.
- conscientising tour operators on community values, and respect.
- organise to provide public cultural villages within communities
- provide information at border & entry points
- develop legislation to protect copyright, particularly for music
- develop specialised tourism products, such as adventure, trekking, hiking, and bow hunting.

- 4.5.8 Provide manpower and financial support to museums etc for their development.
- 4.5.9 Encourage the development of niche markets to support tourism products and particularly the development of products beyond the traditional. A strategy within the general framework of the low volume policy may be to develop volume related markets in areas that are not ecologically fragile. For instance, Francistown, Lobatse and Gaborone, to offer sports, or entertainment tourism, theme parks with or without casinos, etc.
- 4.5.10 Provide integrated planning systems for support services e.g. there is no provision for metered taxis due to Government bureaucracy - which makes it difficult for the visitor, and creates negative images.

Encourage development of less attractive, new areas, particularly if they involve community joint ventures or ventures with Botswana.

The Gemsbok National Park is the only game reserve that borders two countries, and offers vast quantities of animals, especially the cat populations (Lions, Leopards etc.). It is also an excellent breeding ground for raptors. Tourists visit the Botswana side of park, utilising the South African entry point but do not spend any money in Botswana as there are no facilities & services.

- 4.5.11 An enabling environment must be created with regards to infrastructure e.g. roads, water, destination services, and these may require a policy view that there are long term in nature and there are no immediate returns. Potential areas requiring infrastructure include Ukwi, Deception Valley, Kganja Pans, Xade, Gcwinhabe Caves.
- 4.5.12 Develop historical awareness and access to information, which may encourage the development of new areas e.g. Kollobeng; the Legacy of the Chief and Royal families (to be done in a respectful manner) Robben Island has been transformed into a popular tourist attraction, without losing its esteem.
- 4.5.13 A reservation policy (delineation of tourism activities) has been suggested. For example

- a) Accommodation
 - large facilities may be foreign owned
 - small and medium are preferred to be developed with Batswana participation
 - Guesthouse, private campsites, boarding houses to be for nationals

- b) Support Sector
 - preferred with meaningful Batswana participation as a principle
 - Handicraft production
 - Horseback riding operators
 - natural trails and similar
 - maintenance services

- c) Local Ancillary Services
 - again earmarked for Batswana to take the lead role:
 - coffee shops, food stands, vending facilities
 - night clubs
 - ground transportation, including non franchised car rentals, travel, retail booking services, forex

 - bureau's, information centres, mekoro trails
 - independent souvenir shops,
 - sports fishing, boat rental, equipment rental, tour guiding

4.4.14 The encouragement of an 'open skies' policy to foster a growth in the airline sector. Comair's demand has grown and recently they increased their capacity on the Johannesburg - Gaborone route to an ATR 42.

4.4.15 Global trends are that world tourism is the biggest industry today, now worth a total of US \$ 3.5 billion per annum. Africa receives a total of 4% of this figure.

South Africa is planning for a 20 % increase in total tourist arrivals over the next year, and has committed a budget of R90 million for Tourism. Inevitably there will be overflow into the region, and Botswana has an opportunity to target the top 0.25 % of this market.

4.6 Harmonisation of Government Support for Tourism Development

The objectives of the Tourism Policy states that "it is the intention of Government to bring about, as quickly as possible, an orderly increase in the participation by Batswana in the industry as employees, investors and operators."

However in attempting to implement the policy, structural constraints arise directly due to

- a) the lack of a cohesive tourism development policy, and structures to implement the policy
- b) the lack of co-ordination of respective public sector departments and, co-ordination/consultation with the private sector in certain areas.

4.6.1 The tender process for prime concession areas.

The tender process and procedures seek to maximise the greatest financial returns to the community on a sustainable basis; and are not aimed at developing citizens capacity within the local communities. Requirements for sophisticated and therefore expensive environmental and management impact studies will ensure that Batswana are denied access to these unless they have the financial ability.

4.6.2 Encouragement of Joint Ventures

The policy further encourages joint ventures involving citizens; as a means of ensuring meaningful participation by the latter, the transference of skills and expertise, and sharing of financial risk.

However, financial institutions such as Tswelelo insist on Batswana having a minimum of 51% shareholding, which is not feasible for small and medium sized partnership.

Immigration and Labour will need to share the view to "remove unnecessary barriers to tourism investment." Recently a company trying to recruit a hotel Front Office Manager with industry specific skills was told to use an inexperienced generalist administration graduate from the University instead.

4.6.3 Lack of integrated Govt procedures to encourage tourism investment.

To take a investment proposal from idea formulation to implementation currently takes more than 1 year

- a) Application for land - process takes over 1 year if lucky, average 5

- b) Application for licenses - 1 year - need 3/4 separate licenses for food, drink, tour operating, craft shop for one establishment. All the above are conditional on the other.
- c) Application for work permit - average 1 year (if joint venture)
Application for a temporary waiver - 3 months (if joint venture)
- d) Application for resident permit - another year (if joint venture)
- e) Essential services- telecommunication takes another year

4.6.4 Implementation without consulting relevant stakeholders particularly affected parties in the private sector.

Recently a departure tax has been introduced for both international and domestic departures (the latter is not done anywhere in the world). The most affected persons will be Batswana employed in the Delta, who use the commuter air service at subsidised fares, being penalised as they travel to Maun for their days off - costs are borne by the individual, and staff that are generally not well paid. Management staff always have the opportunity to turn the trip to a business trip and the company bears the cost.

Secondly, the recent increase in road permit fees for Zimbabwe tourist vehicles entering Botswana, will encourage retaliatory action by Zimbabwe and a reduction in visitor numbers. (Fees increased to P1800 per quarter). Does the road department want to reduce road traffic from tourists using Zimbabwe as a gateway?

4.6.5 Batswana cannot be tourists in their own country.

The tourism policy encourages low volume, high cost structures, and talks very little of low and medium cost, low impact structures. Currently there are no facilities catering to the domestic market in the Okavango and Chobe, a market with a lower disposable income and without the benefit of exchange rate like the overseas markets. Thus, Batswana will continue to be unable to participate as visitors in their own country, but will spend the tourist Pula in Zimbabwe and South Africa, creating leakage's in the multiplier effect.

4.6.6 Local authorities denied opportunities to facilitate tourism development

The Francistown Town Council was denied the opportunity to lease land to private entrepreneurs to operate a public camp site in 1993. The request was rejected at the Ministry Headquarters.

4.6.7 Transferring and not replacing specialist skills

Efforts to develop continuity with those responsible for development of historical and cultural centres for leisure and educational visits (specifically

museums) is hindered by skills being transferred out of the department and these not replaced. Although tourism has been given the recognition for being the engine of growth for the country, there has been a low level of effort to provide adequate manpower and financial resources to implement the policy.

4.6.8 Lack of direction of linkage industry skills towards the tourism sector

Craft and vocational skills taught by the Ministry of Agriculture, Integrated Field Services, Vocational Schools have not being directed to assisting entrepreneurs penetrate the tourism industry e.g. tent repair, supplying table cloths, furniture, linen for camps and lodges.

However, these markets are very selective and competitive as the South Africa option is in close proximity, and will require quality products, marketing effort and added value to penetrate them. Although the markets are small in size, the global trend is for travellers with a social and environmental conscience.

Where products are unique, suppliers have the opportunity to become export oriented to other regional tourism markets to justify the level of specialisation required. For instance, the truffle is another well kept secret of the Kgalagadi.

4.6.9 Last but not least is the **lack of a common vision/goal towards the industry.**

All Government departments interface with the industry - including the not so obvious like the Police, Education, Home Affairs to Agriculture, Mining and Water Affairs.

4.6.10 Over dependence on lengthy duty trips around the country as a source of personal revenue, is leading to high costs in road transport and vehicle write off due to accidents. Productivity could be enhanced by better use of internal air circuits; furthermore, higher volumes would create higher load factors and increased service through economies of scale for Air Botswana.

Recommendations

4.6.11 A deliberate policy of affirmative action should be incorporated in the concession areas, whereby one concession in every tender is reserved for Botswana companies to bid and access prime concession areas. The minimum resource rentals levels demanded could be reduced to more appropriate figures.

4.6.12 More creative means to establish within organisations such as Tswelelo more equitable and attractive shareholding arrangements in joint ventures. For instance, the Botswana Development Corporation does enter into arrangements whereby although the joint venture partner is a minority shareholder, its interest is protected through the holding of double voting rights, which effectively gives the partner control of the Board.

Anglo American Small Business Division also takes minority shareholding, but charges 'management fees' for its services, in addition to the profit and equity stake it holds.

- 4.6.13 Structures must be put in place, as a commitment from the Government to improve the length of time it takes to put in place the "legal" process that is required prior to investing. An acceptable norm in the manufacturing sector in Botswana is a few months.
- 4.6.14 Consultation by relevant stakeholders with the private sector prior to implementation should be prerequisite for issues that may involve the industry. The consultative process should be based on the principles that
 - a) compromises may have to be made on the part of both partners (what
 - b) a mutually beneficial relationship will need to be adopted at the end of the exercise.
 - c) exchange of views, from the relevant stakeholders
 - d) the industry is dynamic and highly specialised. What happens in the hunting sector is different from the photographic i.e. seasonality, requirements.
- 4.6.15 More flexible approach to the policy - needs refinement every few years. Currently the definition of low impact needs to be clarified to ensure a better business mix. Volume of tourism activities should not be controlled by price but by planned capacity.
- 4.6.16 Encourage local authorities to identify potential tourism development opportunities within their areas, and these should be co-ordinated through the Dept of Tourism/Wildlife build up a register of potential investment opportunities that TIP/BDC can sell. Bottom up strategy identification of opportunities.
- 4.6.17 Need for a better understanding of skill requirements. Accelerated recruitment and succession planning.
- 4.6.18 The traditional system used in Botswana to empower people is the development of production led skills (e.g. carpenters, bricklayers). Further courses and business skills can be accessed for those with entrepreneurial spirit. Unfortunately these craftsman are unable to sustain themselves due to inability to sell themselves. Marketing techniques and support for developing markets for industries are not emphasised..
- 4.6.19 Trade organisations and corporations need to be encouraged to develop " small business units " as an integral part of their community responsibility programmes..

A common factor amongst the individual owner/handicrafter (particularly crafts such as potters, jewellers, handicrafts) is the lack of trade organisations to provide assistance and advisory services during the business incubation period.

For example: BEDU taught women to make moulded jewellery, using silver & gold. After learning the skill, the women were unable to purchase the appropriate material and were denied access to the BEDU machines. These women have resorted to making jewellery out of flat silver, which limits their design and product quality. Their market is the domestic market in the Mall, and lack the financial resources, packaging and added value skills to sell to the their beautiful Botswana designs to the incoming leisure market in the North..

Traditionally rural crafts were sold through centrally organised intermediaries such as Botswana Craft. Tour operators are now bringing tourists to the communities, enabling the consumer to deal directly with the producer in determining market price. The tour operator's motivation is to add value to his tourist product by including a cultural visit to a community. The community benefits by dealing directly with the consumer.

- 4.6.20 If civil servants were directed to make better use of air services, there would be a justification for increasing domestic flights in other parts of the country as well , using local scheduled private air services in addition to Air Botswana. There has been a reluctance by relevant authorities to explore this issue.
- 4.6.21 Incentives in South Africa have led to an increase in privately owned wildlife properties - a significant incentive is the legal provision for ownership of wildlife. Available only to tenured land owners, often assisted by State subsidies. Ownership of game farms, game lodges, and game animal industry has grown. Incentives could assist in programmes to re-establish certain species whose numbers are rapidly dwindling in the country.
- 4.6.22 A common goal / vision can be expedited through the development of long term, national programmes such as "Hospitality Service". It is important that there is reinforcement that tourism is reliant on hospitality - and all stakeholders, including all departments of Govt need to understand where they fit into the tourism industry and how they can contribute to its growth.

4.7. Capacity Building at a Community Level

The Department of Wildlife has recently launched the Community Joint Venture guidelines as a tool to assist communities to structure themselves to enter the tourism industry. Thus communities need to determine what skills they lack and use the Dept of Wildlife as a facilitator to identify potential partners.

A prototype, the Chobe Enclave, has been in operation and is successfully managing hunting safari activities. They intend to broaden their activities to include photographic safaris.

However, in order to enter joint ventures, communities will need to address:

4.7.1 Institutional Development

Capacity building and training in institutional functions at a community level is a prerequisite for economic sustainability. The business skills must include the ability to form effective business entities, formalise responsibilities and monitoring procedures; instil a structure to provide cohesion and consensus ; operate in a dynamic and constantly changing business environment, compete in a national, regional and international tourism world.

4.7.2 Leadership Skills - the need to work towards community goals as opposed to individual goals. The community must be educated to demand responsibility and accountability from their leaders. The success of the Chobe Enclave community project has been motivated by the desire to force an existing operator (Hunters Africa) out, hence their cohesiveness and goal clarity. For example, Landlords have a responsibility to educate the community on different land use patterns, ownership, utilisation.

4.7.3 Development of business to business relationship - a Setswana tradition is the premise of fairness, which is different from that in business which protects interests at all costs. There is the need to integrate the two joint stakeholders enter into a mutually beneficial relationship, sharing risks and rewards, and avoiding one partner being exploited . Joint venture partners technical proposals should avoid the exploitation of communities, as the former can be dismissed if in contravention of proposals.

4.7.4 Lack of motivation to develop community wildlife management areas due to

- a) lack of financial resources - the use of the natural resources as the communities equity may not provide sufficient capital injection to facilitate development plans. There is need for a revolving, micro fund, controlled through the Village Development Committees. Communities would be issued with new loans as the old ones were cleared.
- b) lack of understanding of the long term implications and benefits to be gained from the tourism industry.
- c) short term needs not being satisfied. Subsistence agriculturists need to find substitute/compensatory means of survival if they are not allowed to hunt animals.

- 4.7.5 Lack of manpower resources to implement joint venture policies in the long term - communities must encourage their youth to return to their communities.
- 4.7.6 Development of non-revenue generating infrastructure - such as waste disposal - which should be the responsibility of the tourism enterprise but which can be prohibitively expensive.
- 4.7.7 The creative distribution and utilisation of revenues generated in a sustainable manner - there is no ideal model, and communities will need to develop structures to suit their specific needs.
- 4.7.8 Democratisation - interactions with all parties need to be inclusive, transparent and designed to broaden political support at local and national levels. Quality of consultation must be improved, and provide genuine information exchange.
- 4.7.9 Managing individual and community expectations. If communities take ownership of development projects and support is provided through the Government, the process may assist in ensuring that objectives are accepted and understood by stakeholders..

4.8 Lack Of Confidence Of Government Development Programmes

The above attitude arises from the fact that the Government is perceived to be making false promises due to the failure and inaccessibility of some programmes. For example, the Grant systems in Gantsi are perceived to be ineffective, or limited to certain sectors of the population only. The problems mainly relate to management, such as unhelpful officials, communication and information gaps,

The biggest factor is the lack of problem resolution. Major issues remain unsolved at a community level e.g. issues of pressure of land for wildlife and cattle. There is no feedback on applications for land until it is chased up - not even an acknowledgement of receipt of application.

Recommendations :

- 4.8.1 Provision of a dedicated information office at all District Council offices, manned by officers, well informed about Government structures and programmes. These offices must ascertain the nature of the request and guide the officer to the correct agent. The information officer's responsibility is direct the public to the right officer who should assist.
- 4.8.2 Government should have a responsibility to acknowledge all applications, particularly requests for land. Often, if the application is on State land, this will

involve tremendous expense incurred as the Landboards standard response is "we have sent the application to Gaborone (five years ago) and are still awaiting a response.". Encourages poor attitudes in the civil service & country.

- 4.8.3 Follow up is essential on all programmes to ensure they are working. Currently these are launched and not followed up - constraint is manpower. Pilot programmes should be a minimum standard.

4.9 Cultural Attitudes and Perceptions

These can be broken down into two areas:

- 4.9.1 Attitudes towards the tourism business are due to a lack of experience of the industry. There are perceptions that the business can only be successful if
- a)
 - i) it is operated by whites catering to other whites. Whites have contacts that Batswana do not, or will tourists use a facility run by a Motswana?
 - ii) need lots of money to enter the industry
 - iii) can only enter as a big safari operator
 - b)
 - i) Batswana cannot enter business that they are not trained for
 - ii) contempt for certain business activities due to British education system that encourages academia hence Batswana are being displaced from economic activities by other nationalities : Indians, Whites, Zezuru, Herero
 - iii) preference to be individual business operator, than to seek a business alliance, consortiums and syndicates.
 - c) Centralised Government structures encourage dependency syndrome.
 - d) understanding that sustainability / success is dependent on differentiation and innovation rather than imitation.
- 4.9.2 Sociological attitudes such as
- a) the recognition of wealth by the size of cattle herd and therefore not willing to liquidate these and utilise as a source of equity
 - b) need to develop attitudes that at a household level, there is need for a mix of economic activities and not focus all resources on any particular area
 - c) Why visit Shakawe, Makgadikgadi...what are you going to see there ?
 - d) Perception that measures development only in terms of infrastructure such as roads, electricity.

Recommendations

These attitudes can be resolved through changing the socialisation process in the education / lifestyle sectors; developing a stronger culture, encouraging alliances and syndicates, decentralising Government structures to a local level and allowing flexibility for local conditions, encouraging differentiation and public recognition of imaginative and sustainable projects.

Benefits from tourism must be satisfying enough to motivate desired behavioural changes amongst Batswana.

5. CONCLUSION

The consultants believe that the constraints identified are typical of the whole country. Effort was not made to try and quantify the magnitude of the problems as they have been cited time and time again. Therefore, where problems are of an 'efficiency' nature solutions are incumbent on management i.e. the Government, local authorities, and communities.

Where problems were of a 'structural' nature, the facilitators identified the gap and sought suggestions from the stakeholders on how best to address the problem in their views. The intention for this bottom up approach is to assist planners when designing operating structures/enabling environments on areas that may need to be resolved.

5.1 The need for the establishment of a private sector driven investment advisory centre is already overdue.

The centre must facilitate the development of well researched and planned tourism enterprises, with an integrated / holistic approach. Insufficient marketing research and operating viability weakness have been the stumbling block contributing to the lack of sustainability of many small & medium sized business. These services will be accessed through a one stop shop. This service will not conflict with the services offered by TIPAs, in fact the services will be complementary, as TIPAs can be the Government shop front (point of sale) once the project is deemed viable. TIPAs could be responsible for the facilitation and co-ordination of the allocation of land, licenses, permits and grants.

Tourism development is in an embryonic stage, and is expected to boom within the next few years. There is an urgent need to ensure that HATAB has the authority and capacity to guide communities and the private sector for sustainable growth. Already the Tswapong North community, through the initiative of their local Member of Parliament, are following the lead of the Chobe Enclave; Gweta, Kang and certain Gantsi communities are also seriously

attempting to enter the industry, and have come to HATAB for assistance. Many communities have not yet been conscientised about tourism, and may try and follow these footsteps and will also need advisory services.

It is a fallacy that Batswana are risk averse, rather they are followers as opposed to innovators in business, at this infancy stage of commercial development. For example, mini booms were experienced as people rushed to

- a) own luxury cars,
- b) cash in on the property boom, to the detriment of many,
- c) move away from owning from small general dealers to conducting specialised trading activities such as bottle stores, butcheries, dry cleaners, mortuaries, vendors caravans, and minibus operations.

Managing the balance between developing this sensitive industry (its market and environment) and the above investment trends will be a challenge.

- 5.2 HATAB needs to strengthen its position through increased public relations activities to garner support for the industry, from the level of the President of the country, Member of Parliament, Ministers, Chiefs, Senior Civil Servants including Permanent, Deputy Permanent and Director level ministry managements. Fortunately HATAB has moved away from its confrontational strategy when dealing with Government, and needs to bolster this new approach of creating a conducive environment through collaboration / cooperation.

Activities needed include :

- 5.3 A joint tourism symposium organised by the Department of Tourism and HATAB. The Government needs to share ownership. A 5 year review of the 1990 Tourism Symposium facilitated through the Botswana Society. It was during that symposium that common goals were agreed with regards to the establishment of the Tourism Policy.
- 5.4 Educational seminars, run jointly with the Department of tourism, to policy makers on tourism - its structure and facilitating its development including Members of Parliament, and the House of Chiefs.
- 5.5 Strengthening HATAB capacity in order to be able to have a more effective and consistent role in the tourism structures that have been created (within the organisation and outside). Secondly, to protect the interest of the tourist and guide / facilitate development. Currently, activities on the various committees are performed by members on a voluntary basis. All members perform these functions in conjunction with their regular jobs.

In addition, the Director's office is inadequately staffed to provide the level of individual service required by its members.

In the near future, HATAB will need to :

- a) Offer well researched and developed input into the planning of NDP 8.
- b) Establish project guidelines for
 - i) environment
 - ii) product design
 - iii) marketing
 - iv) financial
 - v) community joint ventures
- c) Assist in guiding the development & implementation of
 - i) National Public Education Programmes
 - ii) National Hospitality Service Programmes
- d) Planned review of Government Policies that impact on tourism.

LIST OF SEMINAR PARTICIPANTS

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Mr R Kashweeka	Forum On Sustainable Agriculture	Coordinator
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Mr C A R Motsepe	Associated Companies	M D
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Mr M Mothoagae	Hatab	Director
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Mr J Bull	Cresta Hospitality	M D
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Mr E Dewah	Boccim	Dep Director
Mr A Chilisa	Hatab	President
Mr S Mpuchane	Tradeworld	Director
Mr G Matenge	Botswana Society	President
Mr K Mathambo	Min Of Finance	Permanent Sec
Mrs V Mathlaku	Nxaadao	M D
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Ms C Raphaely	Unchartered Africa Safari	Director
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Mr G Johnstone	Marang Motel	G M

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Mr L Mooko	Gweta Nrpc	
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Father Marik	St. Anthony's Church	Priest

LIST OF ACRONYMS

APDF	Africa Project Development Facility
BCB	Botswana Corporative Bank
BDC	Botswana Development Corporation
BNPC	Botswana National Productivity Centre
BOCCIM	Botswana Confederation of Commerce, Industry and Manpower
BOPA	Botswana Press Agency
BPED	Botswana Private Enterprise Development Project
CORDE	Co-operation for Research, Development and Education
DIB	Department of Information and Broadcasting
DOD	District Officer Development
DOL	District Officer Lands
DOT	Department of Tourism
DWNP	Department of Wildlife and National Parks
FONSAG	Forum on Sustainable Agriculture
HATAB	Hotel and Tourism Association of Botswana
IUCN	International Union for the Conservation of Nature
MCI, DIA	Ministry of Commerce and Industry, Department of Industrial Affairs
MOA	Ministry of Agriculture
NDB	National Development Bank
NGO	Non Governmental Organisation
NRMP	Natural Resources Management Project

RAD	Remote Area Dwellers
TIPA	Trade and Investment Promotion Agency
USAID	U.S. Agency for International Development
VDC	Village Development Committee

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