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**Proposed Gamma-Kappa 2nd 765kV Eskom Powerline (Approximately  
370km long) and Substations Upgrade in Western Cape**

**TOURISM IMPACT ASSESSMENT STUDY REPORT**

**Prepared for Nzumbululo Heritage Solutions**

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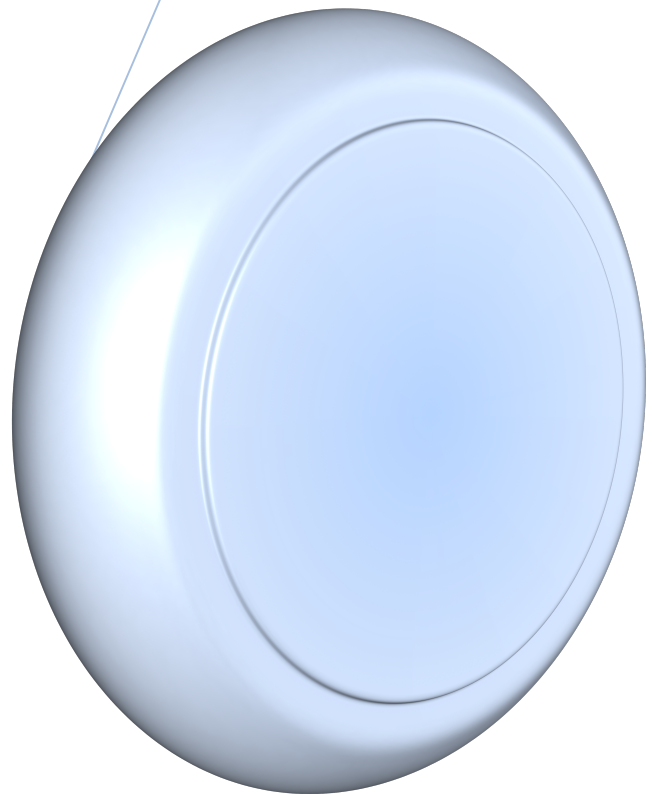
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## 1. EXECUTIVE SUMMARY

This Tourism Impact study (TIA) was commissioned by Finishing Touch Trading, as part of Environmental Impact Assessment (EIA) specialists studies for proposed Eskom Holdings SOC Limited +/-370km 765kV transmission powerline and associated auxiliary and substation infrastructure development. This proposed 2<sup>nd</sup> 765kV powerline alignment extends from Northern Cape Province and will feed into Kappa Substation in the Western Cape Province. Three alternative routes for the proposed powerline will traverse from the Gamma Sub Station outside Victoria West Town in the Northern Cape Province to Kappa Substation close to Touwsrivier in the Western Cape Province. The proposed development is a listed activity as defined by GNR 545 (Listing Notice 1) of 18 June 2010 of the National Environmental Management Act, 1998 (Act No. 107 of 1998) (NEMA). As such the development require a full Environmental Impact Assessment (EIA) study specifically conducted in order to acquire the environmental authorisation in terms of the National Environmental Management Act, 1998 (Act No. 107 of 1998) (NEMA). The application for environmental authorisation for the proposed development was lodged in May 2012 with the lead environmental authority, the Department of Environmental Affairs (DEA). The DEA Application Reference for this study is 14/12/16/3/3/2/353) and NEAS: DEA/EA/0001267/2012.

The purpose of this report is to establish the impact that the proposed development would have on the project area tourism sector. The impact of the powerline development itself and the associated infrastructure development will be considered in our recommendation. This study traverses portions of Northern Cape Province stretching into Western Cape Province. However, in terms of tourism industry profiles of the project-receiving regions, the Northern Cape Province has the least developed tourism market and infrastructure whereas Western Cape is completely the opposite, ranked as a world tourism destination. Although this report will refer to Western and Northern Cape Provinces' tourism in the same context, it should be bourn in mind that there is a highly significant difference in size and development of the tourism markets, sector and industry in the two project receiving provinces.

A key contributor to the Western and to a lesser extent Northern Cape economies, tourism in the region is valued to be representing a considerable amount of the total provincial economies. Using the narrowest definition of tourism, the tourism, travel and hospitality industry it is one of the largest sector employers in the region. The key characteristic of the tourism industry is its large number of highly integrated and interdependent sub segments, where tour operators rely heavily on accommodation providers to house their customers, while accommodation providers rely heavily on transportation services to deliver customers to the destination. This may not be unique to this study area but it does point to a well established sector which is susceptible disruptions should a major infrastructure development such the proposed transmission powerline.

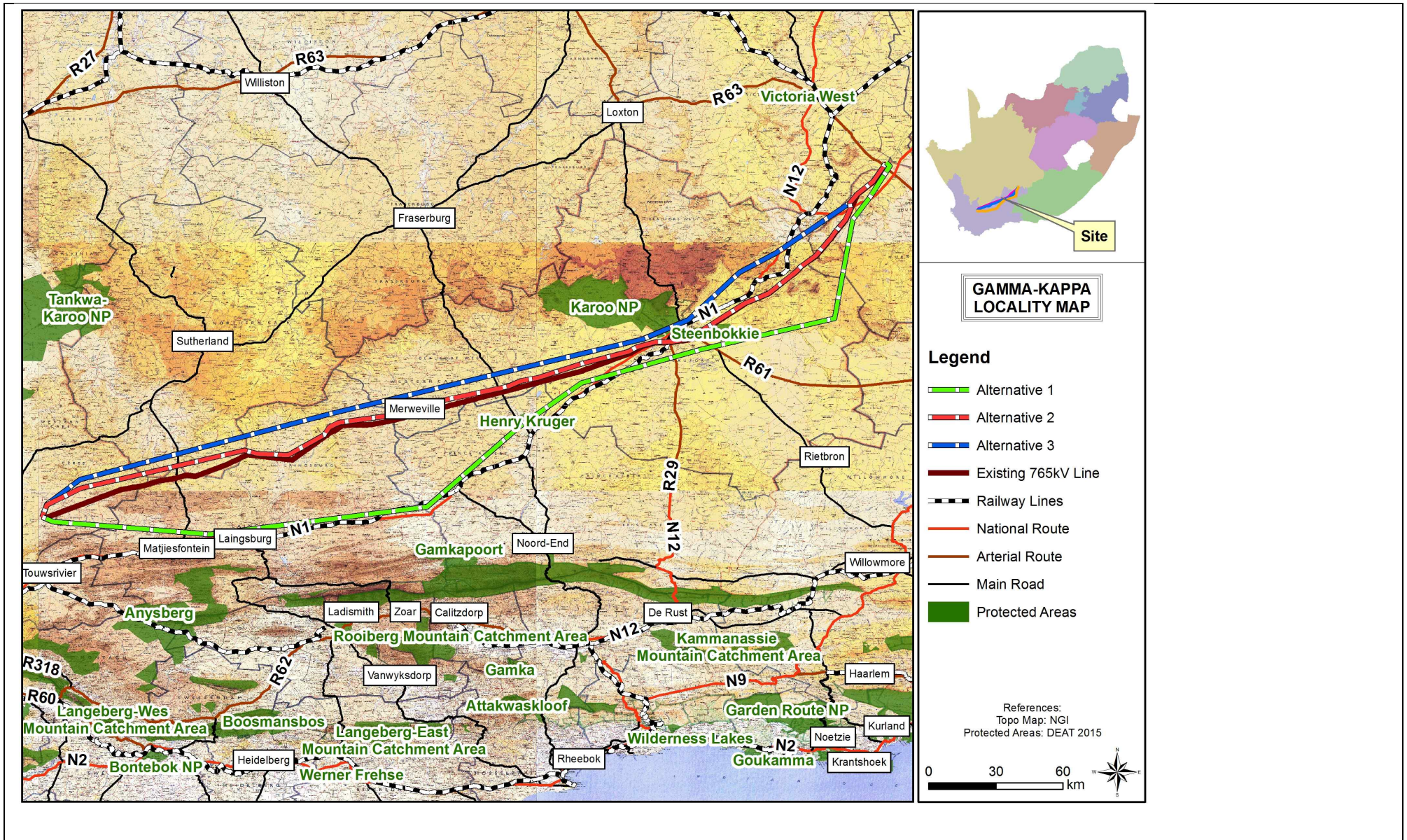
The Gamma - Kappa routing spans three potential options, that is, Option 1 – identified as the green line, Option 2 – identified as the red line and Option 3 – identified as the blue line.

**Figure 1: Brief description of proposed powerline alternative routes.**

DESCRIPTION OF ALTERNATIVE ALIGNMENTS	
ALTERNATIVES	DESCRIPTION
Alternative 1	Alternative 1 is proposed to run in a south easterly direction from the Gamma Substation east of Victoria West, crossing the N1, runs south for approximately 40km, turn west, passing south of Beaufort West, crossing the N1. It runs parallel with the N1 and existing railway line until Laingsburg, turn west until it reaches the Kappa Substation.
Alternative 2	Alternative 2 is proposed to run in a south easterly direction from the Gamma Substation east of Victoria West, crossing the N1, runs south of the N1, passing south of Beaufort West, crossing the N1 following existing power lines. It runs in a south western direction, south of Merweville until it reaches the Kappa Substation.
Alternative 3	Alternative 3 is proposed to run in a south easterly direction from the Gamma Substation east of Victoria West, crossing the N1 before Three Sisters and again after Three Sisters, runs north of the N1, passing north of Beaufort West. It runs in a south western direction, north of Merweville until it reaches the Kappa Substation.

Tabulated data presented below in subsection 1.1 to 1.4 provides summary of impacts identified for the tourism sector in the project receiving areas. The rest of the report provides details of the method applied in the study, the results and impacts identified and the report closes with recommendations.

Figure 2: Layout Map of the three alternative routes.



## 1.1 In/Out Project Workforce-Impacts

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
<b>High demand for short term accommodation along the project route</b>	Availability of visitor accommodation for the leisure/tour market. Knock on effect resulting in decreased sales	Construction	Medium	<ul style="list-style-type: none"> <li>Development of dedicated construction campsites along the powerline route construction areas.</li> <li>Ensure that the construction camps are closed camps</li> <li>Develop transportable short-term workforce accommodation to meet initial demand, but not within close proximity to main population centres.</li> </ul>	Proponent – Eskom & Contractors	Commitment gained from the project proponents (Eskom) with regard to all requirements for worker’s accommodation. Specific details to be incorporated as part of overall approvals process and Agreements relating to the Project.
<b>Presence and visibility of project work force (e.g. increase in traffic, etc.)</b>	Tourism values, character and appeal of rural Northern and Western Cape atmosphere, ambience and relaxed nature of countryside.  Tourism branding and destination marketing appeal	Construction	Low	<ul style="list-style-type: none"> <li>Develop and implement processes that facilitate seamless transfer of Eskom/Contractor personnel to/from construction points</li> <li>Create transit lounge in regional capital for project personnel who are being transferred to the construction sites and vice versa.</li> </ul>	Eskom / Contractors  Regional capital Airports	Systems and processes relating to seamless transfer of Eskom/Contractor personnel to be incorporated into project agreements and EMPs and implemented prior to commencement.

## 1.2 Air and Transport Activity Impacts

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
<b>Increased helicopter activity and vehicle movement over the servitude</b>	Character, ambience, holiday atmosphere and destination appeal of rural Northern and Western regions districts	Construction and Operation	Medium	<ul style="list-style-type: none"> <li>Coordinate powerline development related helicopter activity not to interfere with local air traffic;</li> <li>Coordinate powerline Development activities not to disrupt transport routes and goods, services and people movement in vicinity of servitude.</li> </ul>	Proponent – Eskom & Contractors; Aviation authorities; Road agencies	Integrate powerline development related helicopter activities with local aviation traffic; plan and time activities that may disrupt, people, goods and services movements in project area in such a way that the disruption will be minimal.

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes

### 1.3 Land and Housing Impacts

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
<b>Increased demand for accommodation uptake as result of Powerline development workers; Increase value of land as result of Eskom acquisition of powerline servitude.</b>	Availability of local accommodation; Affordability of land within the final servitude area.	Construction and Operation	Medium	<ul style="list-style-type: none"> <li>Relevant stakeholders work collaboratively and proactively in quantifying the land and local accommodation requirements to support the transmission powerline development and operation project, with future needs reflected in updated LEDs &amp; IDPs.</li> <li>Servitude leasing or acquisition arrangements to account for availability and affordability issues.</li> </ul>	Proponent – Eskom & Contractors; Local Authorities; Local Land owners	Accommodation needs quantified and planned for where need; Land needs quantified and assessed in relation to the new servitude and in future land valuations and needs in the project area.

### 1.4 Tourism Branding Impacts

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
<b>Current and potentially future negative publicity relating to the Eskom Transmission project and its perceived impacts on the region's tourism values.</b>	Visitor perception of Northern and Western regions destinations Core tourism values and attribute	Construction and Operation	Critical	<p>Develop and publicly convey a standardised, factual response / message to combat false speculation regarding the proposed Eskom transmission Powerline Project and its impact on Northern and Western regions districts as tourism destination</p> <p>Development and implementation of mechanisms through which ongoing regular visitor research can be monitored for the purposes of measuring and monitoring visitor perception and destination appeal</p>	Proponent – Eskom Public relations; Tourism Authorities; Local tourism stakeholders	<p>Funding commitment from proponent towards a sustained media campaign that conveys the 'facts' in relation to the impact of the Gama-Kappa Transmission Powerline on tourism in the region.</p> <p>To gain a funding commitment from proponent and related government agencies for the life of the project. The purpose of which is to conduct regular market research in order to measure industry performance and monitor visitor perception of the overall Eskom Powerline developments.</p>
<b>Media reference to tourism in the broader</b>	Visitor perceptions and destination appeal of	Construction	Critical	Develop a proactive and targeted tourism campaign that provides a clear distinction	Proponent (Eskom), SA Tourism; Western Cape	Secure funding for the purpose of developing distinctive separate tourism

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
<b>Western Cape Province area being impacted to the same level as Northern and Western regions areas by the Eskom Powerline Projects</b>	the broader Western Cape positioning	and Operation		between Northern and Western regions region and the broader Western Cape in terms of tourism values and attribute	Parks and Tourism; Tourism Information	branding for Northern and Western regions vs the broader Western Cape Province
<b>Industry sentiment regarding the need to proactively address any potential impact the Eskom Transmission Powerline Project may have on the tourism industry</b>	Potential for the project to negatively impact visitor perception and destination appeal	Construction and Operation	Critical	<p>Secure commitment from proponent and relevant government agencies that marketing support for the tourism industry will be sustained over the life of the project</p> <p>Strengthen existing Northern and Western Cape Tourism associations through formal and informal mechanisms, with a focus on achieving collaboration and sense of solidarity that facilitates and increase d level of corporative tourism marketing thereby industry spend and overall marketing effectiveness.</p> <p>Gain commitment from key stakeholders to ensure tourism-marketing efforts are complemented by new and improved tourism infrastructure and amenities, thereby enhancing destination appeal of Northern and Western regions region.</p>	Proponent (Eskom), SA Tourism; Western Cape Parks and Tourism; Tourism Information	<p>Gain commitment from public entities that base funding for regional tourism marketing will be provided and indexed at applicable index measure for life time of Eskom Powerline Development projects.</p> <p>Industry stakeholders to develop and implement an agreed operating model that facilitates increased industry collaboration, cooperative marketing activities and improved marketing effectiveness.</p> <p>Commitment from key stakeholders in the project area to support tourism infrastructure development in the Northern and Western regions over the life time of the project.</p>

## 2 BACKGROUND AND METHODOLOGY

### 2.1 Tourism Impact Assessment Framework

Tourism is multi-sectorial in nature and includes issues of infrastructure (transportation, electricity, water, land), labour, use of natural spaces as tourism products. Apart from the tourism industry, which includes hotel/resort owners, tour operators and tourists, important stakeholders are communities who live in the vicinity of tourism destinations. Given this broad reach of this sector, perhaps it is not a surprise that tourism is increasingly being seen as a developmental tool, which can address issues socio-economic development including contributing to addressing poverty, employment and community and regional development through what is known as multiplier effects. As such, where there is any potential that a proposed development may impact tourism sector, it becomes prudent that such proposed development should be assessed and adequately considered while planning developments such as the proposed 765kV transmission powerlines between the Gamma substation and the Kappa Substation close to Northern Cape and Western Cape provinces boundary and in the in the Western Cape Province respectively.

This Tourism Impact Assessment (TIA) study was conducted in the context of the broader Environmental Impact Assessment Study. The over-arching framework of the study is based on the observation that Impacts on tourism could be:

- Actual or / and perceived
- Direct or / and indirect Cumulative or / and immediate
- Reversible or / and irreversible
- Quantitative or / and qualitative Positive or negative
- Isolated or / and part of a chain reaction.

A study of all development impacts – positive and negative – is therefore imperative to further the positive impacts and to mitigate the negative impacts of the proposed development on the receiving environment.

This study was conducted in two basic steps.

Step I: Collection of Baseline Data – Demographic Data.

Step II: Collection of Data on Impacts.

Essentially the steps involved a predetermined set of considerations from which the overall report emanates from. However, the considerations outlined below are more comprehensive than what the research outcome uncovered. As such, only applicable considerations that drew adequate and significant data are were considered in the final analysis presented in this report.

### **Consideration I: General Data**

- General Historical Data about the destination Attractions
- Purpose of visit/Motivations Tourist Statistics
- Tourism Statistics

### **Consideration II: Stakeholders**

- Service Providers
- Branding
- Marketing and Promotion Employment in tourism industry
- Informal, unorganised sector
- Taxes/ fees from tourism service providers - to local/ provincial/ central government Tourists
- Local Communities LSG Institutions

### **Consideration III: Impacts**

#### A. Social Impacts

- Contribution to Community
- Communities Access to Natural Resources Access to common property resources
- Health
- Crime, Safety and Security Displacement
- Land Rights Social Injustices
- Intrusion into private space/ privacy

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#### B. Cultural Impacts

- Standardization
- Commodification of culture / Commercialization Acculturation/ Demonstration effect
- Identity
- Role of tourism in understanding between people and cultures / intercultural learning

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#### C. Economic Impacts

- Percentage of tourism revenues retained in local economy
- Employment benefits to local people Role of SMEs in tourism
- Dependence of local economy on tourism



- Level of prices/ inflation

#### D. Environmental Impacts

- Water Energy
- Waste Management
- Transportation
- Dependence on forest resources Changes to Natural Resources
- Pollution Aesthetics

#### **Consideration IV: Institutional Issues: Legislative and Political**

- Rights/ Violation
- Policy, Legislation
- National Policies and regulatory framework – state and local Lobbies influencing Tourism Policy
- Local Community Participation in Policy Formulation
- Policy, Legislation

## **2.2 Background**

Nzumbululo Heritage Solutions, the Independent Environmental Impact Assessment specialist firm was appointed by Eskom Holdings SOC Limited to conduct the Environmental Impact Assessment (EIA) study for the proposed Gamma to Kappa Transmission powerline development. In turn, Nzumbululo commissioned this TIA study. The scope of this report is to discuss Tourism impact assessment for the proposed construction of the 765 kV (+370 KM) Power Line. The purpose of this document is to examine the current tourism environment and use it as a baseline for predictions and measurements. The document also identifies and describes activities likely to cause impacts. The purpose of this report is to establish the impact that the proposed development would have on the receiving environment's tourism sector. The impact of the powerline itself will be considered in our recommendation. Purpose of the Tourism Impact Assessment was to report on the potential negative and positive impacts of the proposed construction and on-going operation of the proposed Powerline in the receiving environment, within the Western Cape Province.

## **2.3 Project Location**

The proposed project area is located in the Northern Cape and Western Cape Provinces. The powerline will traverse through the following towns and settlements:

- Victoria West in the Northern Cape, and

- Beaufort West,
- Three sisters,
- Merweville,
- Murraysburg,
- Prince Albert,
- Laingsburg,
- Touwsriver and
- Ceres in the Western Cape.

The powerline servitude and associated alternative routes will traverse through commercial farmlands, periphery of urbanscapes, and developed areas distributed across the Northern Cape and Western Cape Provinces. The land-use activities on these farms comprises of commercial animal husbandry, conservancies areas, plantations and vineyards, urban and rural settlements, agro-industrial areas with associated infrastructures as well as vast networks of national regional and local roads, existing transmission and distribution powerlines, bulk and reticulation subsurface water supply networks and such other auxiliary infrastructures.

## **2.4 Layout and design**

The proposed project includes the following activities:

- Equip 1 x 765kV feeder bay at Gamma substation (extend existing busbar if necessary)
- Equip 1 x 765kV feeder bay at Kappa substation (extend existing busbar if necessary)
- Build the 2nd  $\pm 400$ km 765kV line from Gamma Kappa with 400MVAR line reactors at both ends.

### **2.4.1 Tourism Impact Assessment Parameters**

The Tourism Impact Assessment has been developed to answer two (2) key questions:

- How will the transmission powerline development impact tourism in the region – positively and negatively?
- What can be done to mitigate and manage the negative impacts and capitalise on any positive impacts?

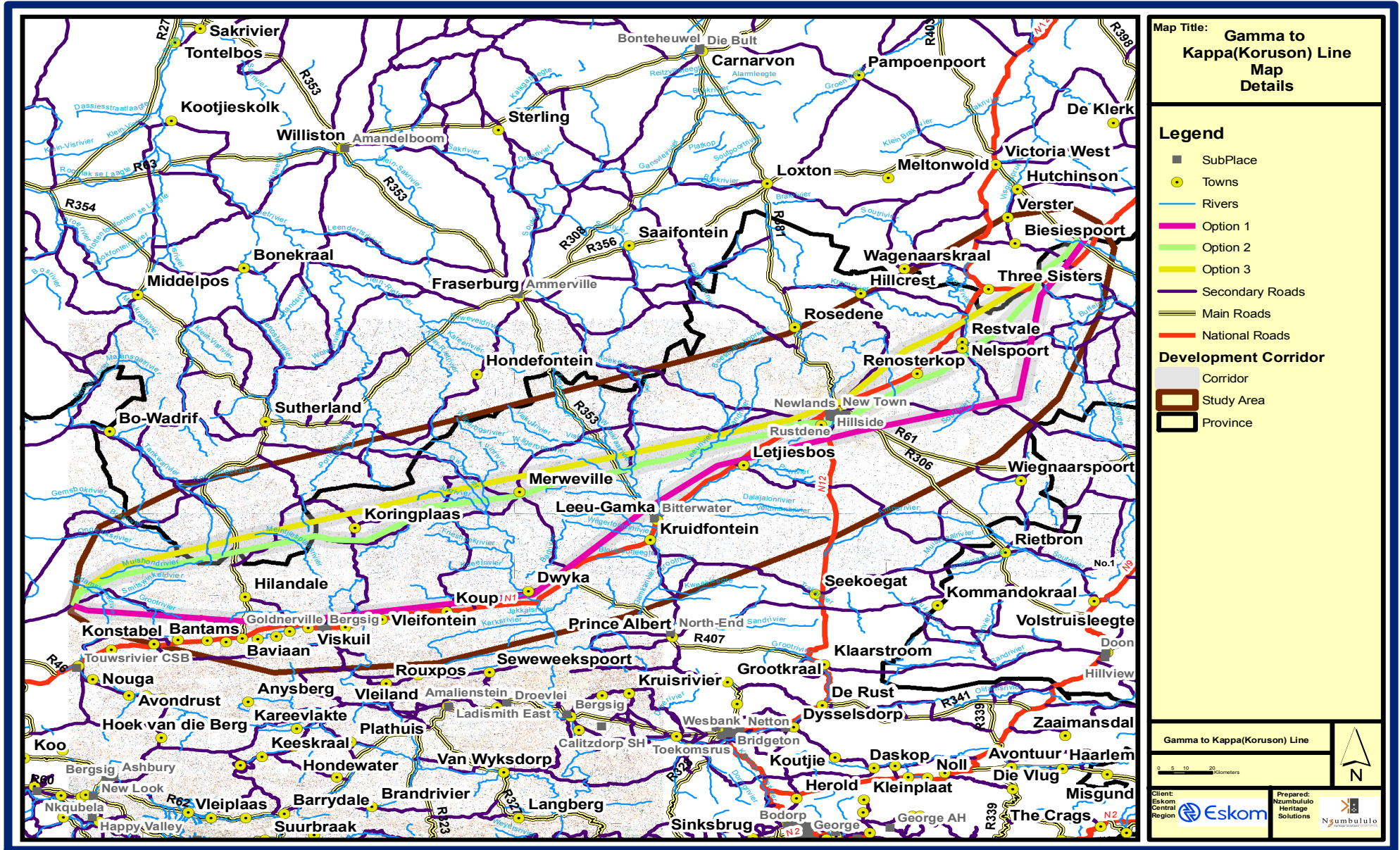
## **2.5 Project Objectives**

A number of specific informational objectives needed to be addressed in the research, as follows:

- What is the current state of the tourism industry in the project regions of Northern and Western Cape Provinces within the specific and broader South African context, in terms of structure and value, as well as visitor numbers and profile?
- What are the potential impacts at each stage of the development cycle (from construction to operation) on tourism in the region?
- What measures could be implemented by local authorities or government, the tourism industry or the Eskom SOC Transmission Powerline operators to mitigate the negatives and capitalise on the positive impacts identified?

After all information had been collected and analysed, an impact mitigation strategy was developed in response to the proposed development. The Researcher was keen to ensure that the Tourism Impact Assessment is an objective assessment of the situation and of what should be done to maintain the area as a tourism region.

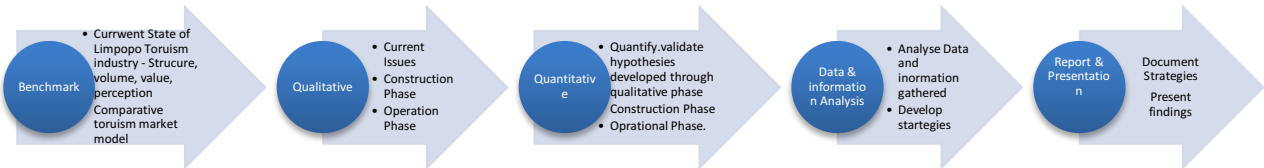
Figure 3: Layout map of the project area in Western Cape Province (Source of Map: Nzumbululo Heritage Solutions).



## 2.6 Study Methodology

This TIA study is part of a broader Environmental Impact Assessment study. As such the process followed were in line with the stated objectives of capturing the overall impact of the proposed powerline development. The study followed a basic process flow starting benchmarking followed by qualitative and quantitative data gathering and analysis which then provided the foundation report recommendations.

Figure 4: Study process illustration.



### 2.6.1 Phase 1 – Benchmark (Current State Of The Industry)

This first phase was designed to provide a “snapshot” of the current state of tourism in terms of value, visitor numbers, structure and profile. This benchmark was an important component of the impact validation requirement of the potential impact to the destination. The Researcher conducted reviews of accommodation study, visitation study for the project area within Northern and Western Cape and reviewed potential tourism developments in the project receiving districts.

The key characteristic of regional tourism sector is its large number of highly integrated and inter-dependent sub segments, where tour operators rely heavily on accommodation providers to house their customers, while accommodation providers rely heavily on transportation services to “deliver” customers to the destination and so on. This key characteristic has created a trend in the vertical integration of the industry’s sub segments. If this project was to provide a realistic and defensible analysis of the size and structure and profile of tourism in the proposed project area, the dynamics of horizontal integration also needed to be quantified.

The desktop accommodation studies used sampled visitor numbers by occupancy by rate to determine the size of the accommodation market and then a multiplier to estimate the size of the tourism sector in the region from the statistics of the province. However, as this project looked to consult with stakeholders including tour operators, tourism service providers and so on, the tourism sub segments (as above) were

accurate multipliers for this and future projects. In order to validate and update previous studies, consultation with industry stakeholders was required which also provided the opportunity to identify: current issues that may be impacting on growth and viability; positive and negative impacts through the construction and operational phases of the proposed 2<sup>nd</sup> Gamma-Kappa Transmission Powerline development.

#### CONSULTATION PROCESS

Phases 1 and 2 of this study were overlapped to a large extent as stakeholders that were consulted to help quantify industry structure, size and profile also provided input to determine current issues impacting industry growth and viability and the perceived impacts through the various stages of the powerline development. These data was gathered in two forms: general I&APs consultations and tourism sector focused survey.

#### DESK RESEARCH

In tandem with stakeholder consultation, a comparative review of case studies from around the country where Eskom SOC has implemented powerline developments of similar or larger magnitudes was also completed.

#### OUTCOMES PLANNED TO BE ACHIEVED FROM THE PHASE ONE PROCESS

- Verification of research and studies being undertaken in terms of the overall Impact Assessment project.
- Quantification of the value, structure, visitor numbers and profile of tourism in the broader project receiving area from Northern to Western Cape regions.
- The completion of exploratory interviews with tourism operators including safari operators, hunting reserves, tourism industry service providers and identified local government agencies.
- Exploratory empirical research of the issues that currently impact on the tourism industry growth and viability.
- Qualitative research (verisimilitude) of the positive and negative impacts at various development stages of the Gamma-Kappa Transmission Powerline development and operation on tourism from the tourism industry sector perspective.
- The identification of potential impacts and mitigating strategies adopted.

#### **2.6.2 Phase 2 – Qualitative (Stakeholder Consultation)**

This Phase 2 was critical to the project in meeting the defined study outcomes in terms of:

- Quantification and qualification of the positive and negative impacts from the development of a Transmission Powerline; and the development of hypotheses of management strategies that will

- The hypotheses developed through this phase were used to form the basis of information that was tested through the data that were collected in course of the project.

Specifically, this phase of the project explored views of stakeholders, the community and visitors in terms of positive and negative impacts of powerline development through each development stage. The Researcher approached the research with a holistic “global view” based on the following principles:

1. There is no one or predominant reality in terms of the impacts (positive and negative) of the development of a transmission powerline development on tourism; and
2. Reality is based on the perceptions of individuals, which will vary greatly and change over time.

The systematic reasoning process used in qualitative research involved perceptually putting pieces together to make a whole. From this process explorative hypotheses were produced. However, as perception varies with the individual, a wide range of hypotheses were developed for this project.

### **2.6.3 Secondary methods involved**

Desktop research and sources used were: Statistics South Africa, South African Tourism, Provincial government reports, Northern and Western Cape Tourism Parks and Board, District and Local Municipalities.

- Reviewing tourism policies of district bodies and identifying any possible negative impacts
- Obtaining tourism data to establish a baseline for tourism in the area, segmenting tourists by purpose of visit, differences between foreign & domestic tourists.
- Consulting with a sample of tourism businesses in the area
- Researching the impacts of similar developments elsewhere
- Considering the evidence and estimating the likely impacts.

## **2.7 Assumptions and Limitations**

For the purpose of this study, the sphere of impacted tourism asset is between 0km and approximately 3km wide for each proposal alternative servitude. It was also assumed and anticipated that resident tourism stakeholders would be the most sensitive in terms of perceived powerline development impact. Tourism by nature is complex and diverse but, due to time and budgetary constraints and moreover for comparative purposes, the data from other powerline related tourism impact studies were accepted in this study. However, the full concept of tourism product and asset is far greater than bed-nights, and includes an array of service and support industries that have not been included or quantified in this study. Tourism is also inherently linked to the concepts of brand, image and perception. These concepts are very difficult to quantify but have a tremendous impact on the industry and therefore have been considered in this

various destinations. This choice, in turn, is based on the perceptions of those destinations held by potential tourists, specifically in terms of the degree of attraction and the ultimate satisfaction of their visitation requirements. These requirements are as diverse as the tourists themselves, ranging from location to environment to cost. Specific tourism visitation or value statistics are neither systematically collected in, nor available for, the areas in proximity to proposed powerline servitude.

The value of unexploited natural resources in tourism impact assessment was not possible to estimate in this assessment. Specific tourism visitation or tourism monetary value statistics are neither conducted in, nor available for, the tourism industry delineated and affected by the proposed powerline servitude. Owing to budgetary and time constraints, comprehensive and significant probabilistic quantitative surveys were excluded.

### **2.7.1 Key Challenges in Stakeholder and Public Consultations**

The challenges encountered during stakeholder and public engagements include the following points:

- Difficulties in getting direct contacts to owners of tourism establishments and key parties – for instance not getting direct contacts to some of the primary operators as they rely on travel and accommodation agencies, which would not cooperate in provision of direct contacts of the actual operators or facility owners.
- None response – several direct and indirect attempts were made to majority of tourism operators and associate facilities but most management personnel at certain sites took far long time to respond to the questionnaires.
- Some tourism establishments claim not to have resources (e.g., computers, internet, etc.) in order to respond to follow through questionnaires.
- Refusal to cooperate with research team or indifference.



### 3 RESEARCH REQUIREMENTS

#### 3.1 Introduction

The objectives of the Tourism Impact Assessment study indicated the need for a combination of qualitative and limited quantitative research across a range of stakeholders, including:

**Visitors:** Visitors to the Western and Northern Cape regions (Note that Northern Cape has the lease of the tourism market in South Africa whereas Western Cape Province is among the highest and considered world class destination).

**Community:** The local Northern and Western regions community and associations within the project's receiving environment focusing on the social and economic welfare of the region.

**Tourism industry:** Tourism organisations and operators focusing/operating in the region affected by the proposed development.

**Powerline development industry:** Eskom SOC development stakeholders.

**Institutions:** Governments (Western Cape and Northern Cape Local, Provincial and National), civic organisations, compliance agencies, etc.

The research was designed to consider data from stakeholders input and PPP, as well as reconnaissance limited surveys of visitors and members of the Western and Northern Cape community within the project area as appropriate. These data were collected directly from sample participants, from secondary sources and studies from the region as well as model data from other similar TIAS (also see Table below).

Phase	Potential Methodology Identified
Reconnaissance Survey	A Desktop aerial survey and drive-through field survey within the study area
Current state of the industry	Modelling of existing information on industry structure and value
Identification of potential impacts (positive & negative)	Discussions with stakeholders
Qualitative impact assessment	Discussions with stakeholders and local community groups in project area
Impact validation through prospective quantitative/survey research	Visitors: Opportunistic Face to face unstructured interviews while in the project area in Western Cape. Local community including owners of tourism facilities in the project area: Unstructured interviews and Telephone survey.

### 3.2 Research Activities

The Researcher highlighted the need to undertake the following activities as part of the project scope:

- Liaise with the other project specialists, government agencies, and tourism sector role players in regard to the overall Tourism Impact Assessment and other relevant studies to minimise the amount of overlap when consulting with the local communities and businesses.
- Review other case studies from around the country where transmission powerline developments have been introduced into a region where tourism is considered an important segment of the economy to identify potential impacts and possible mitigation measures.
- Identify current issues impacting on the growth or viability of the Western and Northern Cape tourism industry.
- Travel to Northern Cape and the Western Cape Districts to consult with local and regional tourism and hospitality operators and stakeholders to determine a socio-economic profile of the industry (employment numbers, value and size of the tourism industry), establish a detailed report of the operational requirements of the industry (for example, accommodation, transport and access, staffing levels and housing); and determine the distribution of visitors to other Western Cape destinations using Western and Northern Cape as the gateway.
- Liaise with tourism industry stakeholders to determine potential negative and positive impacts on the tourism industry from the construction and on-going operation of the proposed Eskom Transmission Powerline.
- Determine, based on information provided by other specialist studies and the local and District Municipalities and the resources industry, the negative and positive impact to each sector of the industry and the potential loss or gain to the value of tourism in Western and Northern Cape project receiving environments and the immediate surrounds.
- Specific studies on the potential impacts, both positive and negative, are to be included on local tourism in the project-receiving environment; and safari/game based tourism.

Existing tourism research and recent studies relevant to the project were to be referred to, including but not limited to:

- WC Department of Economic Development and Tourism Annual Reports,
- Eskom EIA Tourism Impact Assessment Studies Reports
- Local and District IDPs and LEDs
- Northern and Western Cape Growth and Development Strategy documents;
- National and Provincial Tourism Growth Strategies;
- Provincial Integrated Infrastructure Development Plans; and

- White paper on the development and promotion of Tourism in SA, 1996 – which is currently under review;
- Institutional Guidelines for Public Sector Tourism Development and Promotion in SA, 1999;
- Tourism Infrastructure Investment Framework, 1999;
- National Responsible Tourism Guidelines for South Africa, 2002;
- Tourism BEE charter scorecard;
- South African Tourism Growth Strategy, 2001;
- Domestic Tourism Growth Strategy, 2004;
- The Tourism, Hospitality, and Sports Education and Training Authority (THETA)
- List of contacts for the tourism industry and stakeholders.

### **3.2.1 Criteria for the significance of potential impacts**

**Nature:** The specific type of impact, what causes it, what will be affected and how;

**Extent:** Area of influence or magnitude;

**Duration:** Short, medium, long term or permanent;

**Intensity:** Severity of the impact or degree of its affects; and

**Probability:** Likelihood of occurring.

The significance of each impact was then determined based on the above parameters, and defined as being of Low, Medium or High significance (with and without mitigation).

## 4 BRIEF PROFILE OF SOUTH AFRICAN TOURISM

### 4.1 Introduction

To fully comprehend the Tourism sector at any level in South Africa, it is essential that one also consider the broad national profile and context of the sector. Review of policy frameworks applicable at national, provincial and regional levels helps contextualise the significance of the tourism sector in view of this study. In brief, the purpose of this section is to analyse the tourism trends within the South African contexts highlighting the Northern and Western Cape regional context in order to provide the baseline data which can serve as a benchmark against which future impacts of the proposed Gamma-Kappa Transmission line can be measured. Tourism and development have coexisted in Western Cape and South Africa in general. In particular, powerline development is one of the most frequent development initiative in South Africa given the rate at which the country is expanding access to energy and developmental initiatives. As such Eskom SOC has commissioned hundreds of EIA studies that include Tourism Impact Assessment Studies. As such this present study is not pioneering in any way to what Eskom SOC has been conducting. It is reasonable to argue that there is considerable applied research literature regarding powerline development and tourism impacts. Some of the specific reports can be accessed from [www.eskom.co.za](http://www.eskom.co.za).

Generally, the relationship between powerline development and tourism is simply that – as tourism expands so does the demand for power. This is equally reflected in the broader socio-economic dichotomy – social and economic development dictate that there be adequate and reliable supply of power. Eskom being the main principle charged with the responsibility of ensuring national supply of electricity, it is inevitable that the development of generation, transmission and distribution of electricity infrastructure shall be a developmental priority across the country, including the project receiving regions. This present project falls within this context.

### 4.2 Tourism Definitions

Tourism as defined by the World Tourist Organization (WTO):

*Tourists are people who are travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.*

In other words:

*A tourist is a person who goes to another place for private interest or who is sent there (for example by a company), but is not employed at this place. Business tourists may go to this place for a*

conference, a workshop or further education. Private tourists may go there for adventure, recreation, education, pilgrimage or other purposes. The 'tourism industry' can be viewed in a narrow sense as the attractions, catering, accommodation establishments, and tour operators. We can also define 'tourism economy' in a broader sense and include related sectors such as transport and branches that are dependent on the tourism industry as illustrated below.

Figure 5: The Tourism Industry components



The objective of measuring the potential impacts of a developmental project on the tourism industry or sector in a given region, such as the Western and Northern Cape proposed project receiving Districts would be to ensure that the negative impacts of the given development initiative are countered, avoided or mitigated. The principle would be to maintain sustainability of the sector. Sustainable tourism, as defined by the World Tourism Organization is "tourism which leads to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, and biological diversity and life support systems." In addition, WTO describes the development of sustainable tourism as a process, which meets the needs of present tourists and host communities whilst protecting and enhancing, needs in the future. (World Tourism Organization, 1996). The present tourism impact assessment study should be viewed in light of these principles and objectives.

If one zeroes in on the most southern and western parts of the country in general, and Western and Northern Cape provinces in particular, they are in the forefront of sustainable and eco tourism, adventure and cultural heritage tourism, marine tourism and safari tourism. Eco tourism is defined as "responsible travel to natural areas that conserves the environment and improves the well-being of local people." (TIES, 1990). Ecotourism is about *uniting conservation, communities, and sustainable travel*. This means that those who implement and participate in ecotourism activities should follow the following ecotourism principles: Minimize impact; build environmental and cultural awareness and respect; provide positive experiences for both visitors and hosts; provide direct financial benefits for conservation; Provide financial benefits and empowerment for local people & raise sensitivity to host countries' political, environmental,

and social climate. In the same vein, TIAS is an effort to ensure that this balance or tourism development aspiration is not disrupted in the project-receiving environment.

### **4.3 Legislative and Policy Framework**

In establishing an impact assessment of the Gamma-Kappa powerline development project it is essential to refer to policies at local, district and provincial levels in order to contextualize the power line's receiving environment. For each policy mentioned a brief description is provided followed by the direct implications for the Northern and Western Cape areas under the scope of investigation.

The promotion and development of tourism in South Africa has significantly improved over the past decade through a more structured development of relevant policy and legislation. In 1996, tourism's contribution to Gross Domestic Product (GDP) was approximately 4 %. This was relatively low in comparison with international standards. Act 108 of 1996 of South Africa's Constitution provided Government with a mandate to promote and market the country to stimulate the growth of both domestic and international tourism. This led to the formulation of the National White Paper on the Development and Promotion of Tourism in South Africa of 1996, in which it was estimated that the improved policy and legislation frameworks would result in a GDP contribution of at least 10 % by 2000.

The National White Paper provided a broad policy framework and set of guidelines that prompted a deliberate and a resolute policy development process. This process would culminate into the establishment of more coordinated, national, provincial and local governing structures such as South African Tourism (SAT), Northern and Northern and Western Cape Tourism, Parks and community tourism associations (CTA's) National and provincial legislation further directed the formulation of Integrated Development Plans (IDPs) on municipal level to provide an overarching structure for socioeconomic and sectorial development on district and local level.

If national plans were to be successful at local level, they had to align with, and dovetail into district, provincial and national tourism policy and legislation as well as other relevant policy frameworks on all levels. In this section the above mentioned overarching policies and other governing policies and frameworks that have an impact on tourism development are reviewed in order to provide direction for and achieve alignment.

#### **4.3.1 The Tourism Act, 1993 (Act No. 72 Of 1993)**

All matters '*tourism*' may be considered to be regulated under the Tourism Act (Act 72 of 1993). The proposed Eskom Transmission project will traverse through the Western and Northern Cape region where tourism is a main economic activity. As such, under the applicable legislation, it is essential that the impact

of the proposed development in relation to tourism sector be considered. Policy and legislation governing tourism in South Africa emphasizes the concepts of responsible tourism and sustainable tourism development. Tourism in South Africa is legislated in terms of the Tourism Act (Act No. 72 of 1993), which was amended as the Tourism Amendment Act (Act No. 105 of 1996 and the Tourism Second Amendment Act no. 70 of 2000. The 1996 White Paper on Development and Promotion of Tourism in South Africa introduces the concept of “responsible tourism”; i.e. tourism with a responsibility towards the environment, through sustainable use of resources, involvement of local communities, and commitment to safety and security of all concerned. Taking this further, the drive towards “sustainable tourism” development emphasises the optimisation of benefits relating to tourism, without compromising future benefits.

#### **4.4 Local Policy Review**

The mandate of the provincial Tourism authorities is to promote, foster and develop tourism to and within their respective territories. For example, tourism affairs in the Western Cape Province may best be looked through the policy, objectives and operations of the Western Cape Department of Economic Development and Tourism. The board’s vision is to make Western Cape Province the preferred tourism destination in South Africa. In order to achieve this, the department’s mission is to facilitate holistic development of tourism and community empowerment therefore ensuring that all people have equal access to the social, economic and environmental opportunities and benefits created by the tourism industry. The board also ensures that nature reserves and protected areas are developed, promoted, managed and conserved effectively. Lastly the board facilitates hospitality management in the province.

In reviewing the board and its activities and mirroring them on to the Western and Northern Cape regions’ tourism activities, it is clear that there are several national, provincial and local policies and frameworks that affect all matters tourism.

## **5 STATE OF TOURISM IN NORTHERN AND WESTERN CAPE AND THE BASELINE ENVIRONMENT**

### **5.1 Background**

This section of the study aims to provide a “snapshot” of the current state of tourism in the Northern and Western Cape Provinces in terms of value, visitor, structure and local profile. This benchmark is an important component of the validation requirement of the potential impact to the destination, through loss of safari, eco or wilderness value and sense of uniqueness. In addition to profiling the industry, the brief requires reporting of the operational parameters of the industry in terms of accommodation, transport, access, and accommodation in the Western and Northern Cape regions.

The third part of the brief, pertaining to this section of requirements, calls for a generic understanding of the distribution of visitors to other Northern and Western Cape destinations, using Western and Northern Cape as the gateways (also see Figure 3). The response to this third point has been included in the summary visitor survey. However, as this project looked to consult with stakeholders including tour operators, tourism service providers and so on, these tourism sub segments were used to ensure that all dependent and integrated segments of the industry were included, therefore providing more accurate multipliers for this and future projects.

### **5.2 Data Sources & Consultation**

The value of tourism has been historically difficult to measure. One of the key problems is that tourism is not designated as an independent “industry classification” in national economic accounts, as it is made up of many industries that contribute partly to the overall economy of the permanent residents of a community, while servicing the visitor sector. However, this study also adopted the Tourism Satellite Account (TSA) standard that was developed by the World Tourism Organisation and ratified by the United Nations as the benchmark for measuring travel and tourism in a way that is consistent with other economic accounts. This present study applied the TSA principles to help provide an understanding of the tourism industry in South Africa, defining and measuring travel and tourism in a framework that will allow comparisons with other industries.

The details of the outcome of the preliminary survey or application of TSA approach are not discussed in any details in this report. However, the TSA statistics are only as good as the input by operators. To some extent it fails to separate local economy activity from visitor activity. However, it provides a useful benchmark to validate data collection from local Northern Cape and Western Cape operators.



Figure 6: Layout of the Western Cape major nature reserves and main road links from neighbouring provinces. Note the proposed development is aligned in the region parallel to the northern side of the N1 Highway (Source: [http://www.places.co.za/maps/western\\_cape\\_map.html](http://www.places.co.za/maps/western_cape_map.html)).

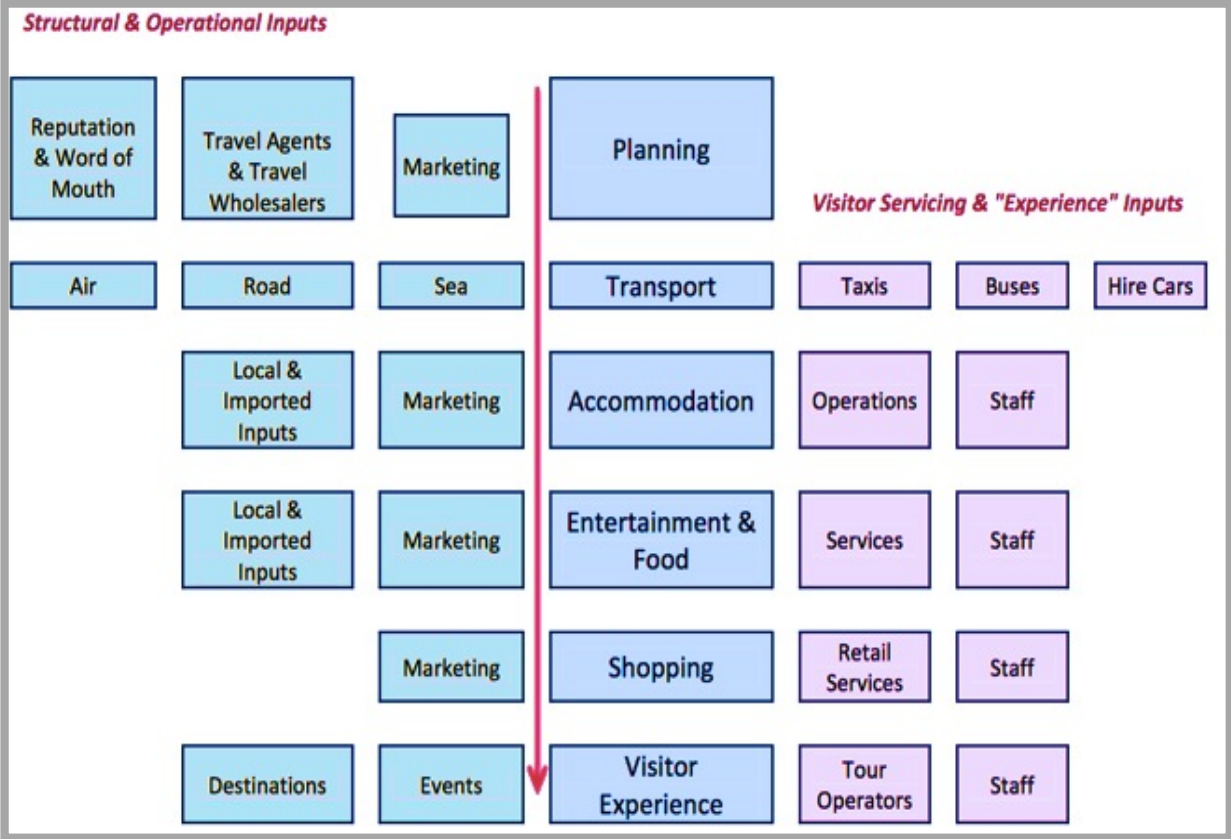


In order to validate and update previous work completed, random and limited one-on-one consultation with industry stakeholders was undertaken. This also provided the opportunity to identify current issues that may impact on growth and viability; positive and negative impacts through the construction and operational phases of the Eskom Transmission Powerline; and quantify the current and envisaged pressure on relevant infrastructure in the receiving environment.

### 5.3 Structure Of Northern and Western Cape Tourism Industry

As already highlighted in the introduction of this report, a key characteristic of Northern and Western Cape Tourism sector is its large number of highly integrated and inter-dependent sub-segments, where tour operators rely heavily on accommodation providers to house their customers, while accommodation providers rely heavily on transportation services to “deliver” customers to the destination and so on (see Figure below). This key characteristic has created a trend in the vertical integration of the industry’s sub segments. However, if this project is to provide a realistic and defensible analysis of the size, structure and profile of tourism, the dynamics of horizontal integration also needs to be quantified.

Figure 6: Structure and Operational Inputs of Western and Northern Cape Tourism (extrapolated from modelled Western Cape Provincial tourism structure).



### 5.4 Project Area

The proposed project area is located in the Northern Cape and Western Cape Provinces. The powerline will traverse through the following towns:

- Victoria West in the Northern Cape, and
- Beaufort West,
- Three sisters,
- Merweville,
- Murraysburg,
- Prince Albert,
- Laingsburg,
- Touwsriver and
- Ceres in the Western Cape.

The proposed preferred powerline servitude and associated alternative routes will traverse through farms distributed across the Northern Cape and Western Cape Provinces. The land-use activities on these farms comprises of commercial animal husbandry, conservancies, plantations and vineyards, urban and rural settlements, agro-industrial areas with associated infrastructures as well as pre-existing networks of national regional and local roads, exiting transmission and distribution powerlines, bulk and reticulation subsurface water supply networks and such other auxiliary infrastructures.

#### **5.4.1 Western and Northern Cape and its people**

The Western Cape Province covers a total area of 129,462 square kilometres. It's the fourth-largest of the country's nine provinces, and with a population of 6-million people. The principal home language is Afrikaans, English and Xhosa.

The province has grown a large tourism industry since 1994. The majority of international tourist visiting South Africa visit the province, with Cape Town, Garden Route and the Winelands being popular tourist destinations. In 2004, Cape Town was listed as one of the top five international tourist destinations. Fifty percent of international tourists to South Africa visit the Western Cape. The province's overall share of South Africa's tourism sector by gross expenditure is 24 percent. There were 1,535,903 international arrivals in 2004 with continued growth annually. Annually 8 million tourists visit the province. Domestic tourism is also on the rise, as low-cost air carriers such as Kulula making travel more affordable to more South Africans ([http://en.wikipedia.org/wiki/Economy\\_of\\_the\\_Western\\_Cape#Tourism](http://en.wikipedia.org/wiki/Economy_of_the_Western_Cape#Tourism)).

Tourism assessment study in the context of the province is highly important given the potential impacts that may be exerted on tourism and associated resources. For example, powerline development has previously document impact on nature reserves. Western Cape hosts more than 3,6 million hectares of national parks, nature reserves and game farms 70% of South Africa's protected land. Game viewing is considered possibly the best in the country hence Western Cape is the preferred Eco-tourism destination in

The proposed powerline T-Off from the Northern Cape Province. The Northern Cape is South Africa's largest province, and distances between towns are enormous due to its sparse population. Its size is just shy of the size of the American state of Montana and slightly larger than that of Germany measuring 372,889 square kilometres with a population slightly over a million. The province is dominated by the Karoo Basin and consists mostly of sedimentary rocks and some Dolerite intrusions. The south and south-east of the province is high-lying (1200m-1900m) in the Roggeveld and Nuweveld districts. The Namaqualand region, famous for its spring flowers, dominates the west coast. This area is hilly to mountainous and consists of Granites and other metamorphic rocks. The central areas are generally flat with interspersed salt pans. Kimberlite intrusions punctuate the Karoo rocks, giving the province its most precious natural resource, Diamonds. The north is primarily Kalahari Desert, characterised by parallel red sand dunes and acacia tree dry savannah ([http://en.wikipedia.org/wiki/Northern\\_Cape](http://en.wikipedia.org/wiki/Northern_Cape)). Most famous for the diamond mines around Kimberley, the Northern Cape also has a substantial agricultural area around the Orange River, including most of South Africa's sultana vineyards. Some Wine of Origin areas have been demarcated. The Orange River also attracts visitors who enjoy rafting tours around Vioolsdrif. Extensive sheep farming is the basis of the economy in the southern Karoo areas of the province.

## **6 BRIEF ANALYSIS OF NORTHERN AND WESTERN CAPE TOURISM SECTOR**

### **6.1 Introduction**

This section presents an analysis of the tourism statistics for South Africa in the context of the sizes of the Provinces' tourism sectors. As highlighted elsewhere in this report, the Northern Cape tourism industry maybe discussed in this report in the same context as Western Cape Province, however, there is a very significant difference in the tourism markets and potential between the two project receiving provinces. As such, there is significant data on Western Cape region than on the Northern Region.

The detailed quantities of the tourism profile and visitor figures are presented in appendixes. Immediate Access to current market information and tourism statistics for the Western Cape Province is limited, and the analysis is largely based on information obtained from South African Tourism, The municipalities IDPs, LED plans and desktop research. Respective tourism and parks board directs tourism development in Northern and Western Cape Provinces. These respective tourism and parks boards' bares the responsibility to promote tourism in their respective territories. For example, the Western Cape tourism board's vision is to become "the leading eco-tourism destination in southern Africa" and the Board's its strategic objectives (2006 -2010) were:

- To grow international arrivals to 770 000 & grow Domestic trips to 5,4 million
- To increase the average stay of domestic tourists by 0.5 day per annum
- To facilitate geographical spread of tourists from two to four regions and increase their spend to R1000
- Facilitate the transformation of the tourism & wildlife industries.

### **6.2 Domestic Tourists And International Tourists**

A review of the data on Western Cape, as is the case with any other province of South Africa, confirms that, the behaviour of domestic tourists and international tourists is significantly different and as they form distinctive market segments the following tables illustrates these differences. According to study done by South African Tourism the most important driver of Domestic Leisure Tourism is Visiting Friends and Relatives (VFRs) while foreign tourists come to Western Cape mainly for eco and cultural tourism while the majority of the African regional tourists come mainly for shopping. SADC countries continue to dominate with the UK being largest source outside of Africa.

## **7 IMPACT OF PROPOSED GAMMA-KAPPA POWERLINE DEVELOPMENT ON TOURISM**

### **7.1 Research Overview**

The Researcher undertook a combination of qualitative and limited quantitative research process with a range of stakeholders, Western and Northern Cape residents, and visitors. Naturally, more detailed attention was dedicated to the Western Cape section where the tourism sector is far more developed than the Northern Cape section of the proposed servitude. The quantitative research, deriving most of the data from previous studies, conducted was seen to be a key phase of the project to meet the defined study outcomes in terms of:

- Quantification of the positive and negative impacts from the development of the transmission powerline; and
- The development of hypotheses of management strategies that will ultimately form part of the recommended strategies.

The hypotheses developed through the qualitative phase of the project formed the basis of information tested through the secondary quantitative data during assessment phase. As a systematic approach was crucial to ensure a sound process was achieved to develop propositions to be tested through the feedback received from “clusters of stakeholders”. However, the data collected was not statistically significant enough to allow for probabilistic empirical tests. As such the final analysis was based on qualitative analysis supported by some limited quantitative frequency statistics derived from secondary sources for the Western Cape Province.

As part of the process of quantifying the “State of Tourism” it was appropriate to also elicit perceptions, albeit not probabilistic, of the impacts of the proposed transmission Powerline development from both accommodation providers and providers of goods and services to the visitor market. In addition, opinions of specific groups of particular interest to Western and Northern Cape regions included tourism facilities operators and business operators had to be considered. As the issue of the proposed Eskom Powerline Transmission development and its impact on tourism (amongst other impact issues), has been of high attention to the communities in the receiving environment during the broad and multi-phased EIA Public Participation Processes, a high level of attention was focused on ensuring all views, opportunities and concerns expressed were recorded as part of this impact assessment exercise.

## 7.2 Key Findings

Inquiries with stakeholders focused on both the perceived positive and negative impacts on tourism as a result of the proposed Gamma-Kappa 765kV Eskom Transmission Powerline development. Discussions were directed around both the potential impacts over the construction phase and operational phase of the development, to determine perceptions of the changes and impacts that may occur over time. Although the limited interviews looked to elicit perceptions and mitigation strategies and were therefore unstructured in format, a number of key issues were raised with different parties over the course of the primary and secondary studies, to ensure comparisons could be made between different stakeholder groups and that information gathered would be able to be collated to present representative findings. Specifically, issues that were raised included:

- Perception of co-existence (tourism and transmission Powerline)
- Impact on visitor numbers
- Impact on the “Northern and Western Cape Tourism Brand” reputation
- Impact on the availability of staff
- Impact on operating costs
- Overall impact on cost of living.

From a generic perspective, general theme of discussion on impact of Eskom Powerline development is usually relatively consistent across all groups in that there was a sense that the transmission powerline would be developed somewhere within Northern Cape and Western Cape and “...*the development is inevitable*”. Eskom powerline impact studies and public participation exercises always consider the issues of “inevitability” of powerline development as a significant benefit for the province and expressed this advantage in terms access to stable power supply and expanded economic diversity, regional growth and potentially greater diversity of employment opportunities.

There were different views within the cultural, eco and nature tourism operator cluster groups, although there was an overall acknowledgement that tourism could co-exist with transmission powerlines if the project is executed in a sensitive manner to avoid key portions of the Karoo bioregion, agro tourism, nature reserves and such areas significant to the tourism market. This should not be interpreted as support for the proposed project but rather, a view that the two (2) activities can co-exist given appropriate planning and implementation strategies. Other detailed impact studies have also yielded views ranging from the “.....*complete breakdown in the entire local ecology*” to “*Western Cape needs stable power supply for future growth to keep the economy growing*”.

Specific impacts on visitor numbers were explored with the intention of understanding the current perceptions of impacts through the construction and the operational phases of the project. To some

nature of the transmission powerline development project. Generally, there is no accurate knowledge of the size of the powerline foot print and its buffer zone, the development timeframe, where construction versus operational employees would be accommodated, access by contractors to private farm lands and so on. However, land-owners tended to focus on the construction phase of the project as this was seen as requiring a larger and more mobile workforce (vis a vis the operational phase) and therefore would create greater movement of people, equipment and supplies in and around receiving environment.

The heightened activity and presence of a large workforce is also seen by tourism service providers as cause for concern albeit limited to construction phase. However, another stakeholder perspective is that the negative impacts that may be on visitor numbers during the construction phase would “disappear” over the operational phase of the powerline. Based on other similar studies a number of stakeholder groups including Tourism Associations, Business and Accommodation providers considered that the nature of the proposed development would help secure long term strategic investments to the region driven by investor confidence in terms of power supply. This is considered as indirectly linked to potential visitor market increase as well as help secure greater economic diversity (through trade) for the region.

However, discussions around the potential damage to the Northern Cape’s or Western Cape’s image and reputation created a far greater division of views. On one hand some business and accommodation providers acknowledge that there would not be any substantial or permanent change to the project receiving areas of Northern and Western Cape or the regions’ images and reputation, while on the other hand, others considered that damage to the Western Cape eco-destination brand may be inevitable particularly in and around areas where the powerline would traverse the Karoo: *“The Karoo have been marketed over many years as eco-tourism,, nature reserves wilderness destinations and the regions such as Karoo and milieu have exotic mystic outpost or frontier image. If that is lost, a lot marketing effort would be greatly reduced”*.

### **7.3 Key Themes & Strategies**

The overall impact assessment discussion focused on strategies for the future rather than limiting to the pros and cons of the proposed Gamma-Kappa Transmission Powerline development. This approach is important since the project brief looked to develop an understanding of impacts and strategies on the basis of the development proceeding, not to measure perception about whether the powerline should or should not be developed. Each stakeholder cluster held views on positive and negative impacts of the proposed development on tourism.



Key themes and strategies that emerge from this study can be summarised as follows:

Key Theme	Issue	Level of Impact	Strategy	Agency
Impact on Brand	Funding	High	Adequate funding to promote the destination on a continuous rather than sporadic basis. Keep destination message "top of mind" in the market.	SA Tourism; Western and Northern Cape Districts, Province; Businesses
	Information	High	Divert part of royalties from the project to destination marketing, product & infrastructure development  Adequate funding to ensure negative publicity does not outweigh tourism positives of the destination	
	Product Development	Moderate	Leverage funds to develop & support Western and Northern Cape Eco-, Agro-Safari, Nature, Game, and cultural Indigenous tourism	
Planning	Controlled Access	High	Ensure vehicles access control to nature reserves and protected areas including game farms to protect country and nature  Enforce Eskom access permit system to control access and protect culturally and naturally sensitive areas	Eskom, Provincial Authorities, National Government agencies
	Contractor Workforce Impact	High	Work with Eskom to move workforce through the servitude with minimal impact particularly to security and safety in commercial farming and nature reserve areas.	
	Workers Accommodation	High	Build adequate workers accommodation where needed in vicinity of servitude to ensure there is no pressure to leisure accommodation along the servitude during construction phase.	
	Land Lease	High	Ensure that Eskom securing of servitude will not disrupt land access and values	
	Road and Access Routes	High	Plan for convenient road access and minimal disruptions on areas where the powerline cross highways, major routes and roads as well as local access route.	
Environment	Protection of bio-regions, land and visual environment	High	Establish adequate guidelines, controls and measures to protect environmental qualities.	EIA Study/EIP; Eskom; Construction & Operation EMPs
Quid Pro Quo	Buy Local	Moderate	Work with Eskom to maximize opportunities and benefits to local businesses	Eskom/ DEA ROD/ Local Businesses

#### **7.4 Summary Of Perceptions**

All data collected was applied to establish an overview of current perceptions on the short term (construction phase) of the proposed Gamma-Kappa Transmission Powerline in Western and Northern Cape regions. The views are in effect qualitative since the study did not yield significantly quantifiable probabilistic statistics that could allow a full quantitative statistical analysis. There was no cluster group that suggested outright that the proposed powerline development could not co-exist with tourism. This opinion may be compared with views and perceptions that will come from other EIA specialists' studies and the public participation process.

## 8 DETAILED RESULTS

### 8.1 Local Community Survey

#### 8.1.1 Background To The Residents Survey

As part of EIA procedures and the mandatory Public Participation Process, the brief required that communities and residents within the project's receiving environment be consulted as part of this study. The aim of this study cluster is to quantify the perceptions of the resident population in terms of the impact of a proposed Powerline development in Northern Cape and Western Cape regions. To recap, specifically, this part of the study seeks to achieve the following:

- Validation /rejection of propositions developed through the qualitative phase of the project;
- Validate/ reject the results of mitigation strategies developed through the qualitative research phase of the project;
- Complete the information, data and consultations.

The communities and participants in the survey were approached during field surveys and others were consulted during the PPP exercise and through a series of follow-up tele-interviews and consultations. Others provided their perceptions and responses through the project Scoping phase reports and PPP Issues and Responses.

### 8.2 Key Findings

In the first instance, the survey of communities within the project receiving environment stretching from Northern Cape into Western Cape looked to collect current views of tourism's value the affected areas and the near regions. All the frequency data referred to in this analysis were exploratory since the response and secondary data applied did not reach probabilistic statistical significance. Be that as it may, majority of role players considers that tourism was good for Western and Northern Cape regions more so for the Western Cape where there is continued growth of tourism. Naturally, the issue of the proposed Eskom Powerline development has generated interest within the Western and Northern Cape commercial farm and the general community as evidenced by the level of response particularly during the project's Public Participation Process (PPP). Those who are opposed to any development in some sections of the project area particularly the Karoo:

*"A huge ugly invasive powerline development that threatens the Karoo bio-region's natural state among other fauna and flora is a conservation tourism suicide".*

Despite some indications of divided community sentiment toward the proposed development coming through in this survey, the focus of the survey was to quantify the impact of the proposed Eskom Gama-

Assessment study to measure and report on how the issues of community sentiment toward the proposed development will impact on social cohesion.

There is universal agreement that tourism and future growth in tourism is good for Western and Northern Cape regions, though people who have lived in the districts for a long time may lament the changing character of the countryside and regions. There is also broad agreement that infrastructure and services will improve as a result of stable and sustainable power supply to the Northern and Western Cape Provinces following the construction of the proposed transmission powerline.

Analysis of the exploratory data proved that people least likely to believe that tourism and a Transmission Powerline could co-exist have lived in the region longer, are more likely to be of commercial farming background households with a considerable farmland, own or control private nature reserve, are involved in safari tourism sector or conservation initiatives of one form or the other, etc. Research from similar studies and findings suggest that there are conditions attached to being “*pro or anti powerline*” in project area. Being “*pro powerline*” suggests being “*anti environment*” while being “*anti powerline*” translates to being “*anti business*” or anti-government.

There are residents who believe the Eskom Gamma-Kappa Transmission Powerline is the most important issue likely to impact on tourism in the short term within the project’s receiving environment particularly in the commercial rural areas around the well known Karoo and the Ceres Mountains, and residents who believe it is the least important issue in terms of short term impact on tourism even if one considers the on-going debate on the Shell Gas Fracking. However, there was commonality of views when mitigation strategies were assessed agreeing that:

- “More money would need to be spent in tourism marketing”
- “The Eskom Gamma-Kappa Transmission Powerline development should proceed only if it is regulated by the most stringent environmental standards”
- “Western and Northern Cape districts that share the Karoo are eco-tourist destinations that should be protected from major disruptive developments”.

## 9 VISITORS SURVEY

### 9.1 Background To Visitors Survey

The brief suggested that visitors be surveyed while they are visiting Western and Northern Cape District areas affected by the proposed powerline development. The aim of this study cluster was to quantify the perceptions of visitors on arrival to and on departure from project receiving Northern and Western Cape regions regarding the impact of an Eskom transmission powerline development in Western and Northern Cape region on their perception of the area as a tourist destination and to measure changes in perception should they occur. As this is the group that will have the greatest impact on any changes to tourism in the region, it is imagined that a systematic survey would be impractical within the parameters and schedules of the study.

### 9.2 Methodology

Attaining statistically significant values require the study to be conducted over a longer period that would include peak-tourism season. The Research eventually applied an opportunistic survey approach where visitors encountered on-site, or in transit in the project area during the field survey were requested to participate in a brief survey. The surveys were therefore completed on one-on-one and face-to-face with field researchers on random basis during this study. The survey was not structured in any way and most visitors' encounters were in accessible areas such as specific tourism venues; on main roads while in transit; at small town centres in commercial areas etc. The interviewers could not reach most of the on-site luxury visitors that may have been at nature reserves, private farms, etc. In fact, the proprietors overwhelmingly considered the interviews as invasive and would have negative impact of their guests. Therefore they consistently objected to approaching or seeking to gain access to visitors at a tourism venues or facilities.

### 9.3 Key Findings Visitors Survey

From a visitor perspective, there is generally indifference towards the proposed Eskom Powerline development with the generic view from visitors saying it wouldn't make any difference to future planning of visits to Western and Northern Cape region or recommending the destination to others. One comment appears to have summed up the sentiment: *"there are powerlines all over the place..."*

This is not to suggest that visitors have no concerns about the Eskom transmission powerline development or damage to the Northern and Western Cape environments. However, these concerns are not reflected in the intention to visit Western and Northern Cape again or recommend the destination to others. The profile of those who believe the proposed Eskom Gamma-Kappa transmission powerline development will

have negative impacts on Western and Northern Cape and damage the natural environment particularly the Karoo, tend to be luxury rather than Visiting Friends and Relatives (VF&R) visitors. They also tend to be encountered in the commercial farming regions and areas with nature conservation farms, private game reserves and commercial farms.

Based on the research conducted, the proposed Eskom Gamma-Kappa transmission powerline development does not appear to have significant or permanent negative impacts on tourism in terms of visitor perception. However, as reputation is a key driver of the decision making process in choosing Western or Northern Cape regions specifically over other destinations, a strong “anti Eskom Powerline” campaign could impact negatively on tourism. As one respondent noted during the interview phase of this study:

*“...the anti Eskom Powerline lobby are doing more harm to the Karoo’s reputation especially the on-going debate on proposed gas fracking projects than the Eskom Gamma-Kappa transmission powerline would ever do”.*

It should be noted that this study has been based on the proposed Eskom Gama-Kappa transmission powerline project alone. Visitor perceptions gathered under this study were also compared to similar results for other Eskom Powerline development projects studies. The findings were not unique to the Western and Northern Cape regions or provinces. Although the data were not statistically significant, the results were considered valid and applicable to appropriately guide this assessment.

## 10 STRATEGIC DISCUSSION & CONCLUSIONS

### 10.1 Strategic Planning Context

The Tourism Impact Assessment undertaken in relation to the Eskom Gamma-Kappa Transmission Powerline Project was commissioned to determine the level to which the proposed development will positively or negatively impact on tourism in the region. Specific key outcomes of this study included:

- Quantification of perceived impacts (positive and negative) of the proposed Eskom Gamma-Kappa Transmission Powerline in Western and Northern Cape as they relate to the region's tourism industry.
- Development of strategic objectives and associated strategies to mitigate against, or capitalize on the impacts identified in relation to the proposed powerline development.

In line with the adopted methodology and project design, the impact assessment process focused on two (2) key stages of development of the Eskom Gamma-Kappa Transmission Powerline: the construction phase and the operational phase. 'The tourism industry' was consulted, albeit at short-term basis on the concept of an Eskom Gama-Kappa Transmission Powerline development being located within a servitude that will traverse from edges of the Northern Cape to Western Cape district regions with these two (2) key phases in mind. 'The industry' referred to in this study includes a combination of the following in the Western and Northern Cape regions:

- Accommodation Providers
- Tour operators and Restaurants & Bars
- Retailers and Service providers and suppliers
- Industry groups and associations.

As part of Interested and Affected Parties as well as the PPP consultation process, the project EAP provided stakeholders with consistent background information through advertisement in local newspapers, through BID, through on-site notices, and Focus Group and Public Precipitation meetings about the proposed Eskom Gama-Kappa Transmission Powerline including location, area of development, workforce projections and the proposed estimated timeframe for development. The information was sourced from the development proponents and consistency of background information used throughout the process ensured participants were able to convey views and opinions based on the same information.

In addition to collating the industry's views and opinions of the Eskom Gamma-Kappa Transmission Powerline, the qualitative research phase also focused on identifying potential strategies through which impacts could be mitigated or capitalized upon. This approach was adopted to ensure the industry played a key role in identifying impacts, and also in developing strategies through which impacts could be addressed. Put simply, the qualitative phase was designed to provide an opportunity for the tourism

provide the Department of Environmental Affairs and other applicable government departments and the project proponents with a clear understanding of the Western and Northern Cape tourism industry's expectations in regards to impact mitigation and management in relation to the proposed development. The consultation process determined what tourism operators and stakeholders believe are the critical elements that need to be addressed to ensure the integrity and long-term future of the industry is secured.

The vast majority of industry operators, particularly in Western Province regions, who provided input into the study considered the construction phase of the Eskom Gamma-Kappa Transmission Powerline to be the most critical in terms of potential impacts. It was invariably suggested that the operational phase is somewhat insignificant in the context of potential impacts if the construction phase is not well managed, as the industry may suffer to the point where it is irrecoverable particularly in sensitive regions such as the Karoo in central Western Cape province. As expected, the views and opinions gathered from the industry are highly subjective and based on perception. With this in mind it must be noted that industry sentiment towards the project, and associated potential impacts, is varied and subject to influence by 'personal' views of the proposed Eskom Gamma-Kappa Transmission Powerline and other historic Eskom development projects elsewhere.

As highlighted, a primary aim of the tourism impact assessment was to quantify the level of impact the project would have on 'the tourism industry', from the industry's perspective. It is fair to say that a number of individuals, tourism businesses and organisations contacted through this process had difficulty distinguishing between impacts on their tourism business as against whether they personally believe the proposed Eskom Gamma-Kappa Transmission Powerline development should proceed. Despite the challenges of working on perception based feedback from industry, the development of strategies has been based on an objective assessment of the range of opinions, views and perceptions gathered through consultation with the tourism industry in the Western and Northern Cape regions and the results from the broader tourism sector and from other similar TIA studies.

In the following sections, strategy development has focused on describing industry sentiment in relation to impacts identified through the different research phases. The impacts noted represent those that were commonly reported by the industry, together with associated reasoning as to how they apply to the regional tourism industry. The potential negative impacts and opportunities arising from the Eskom Gamma-Kappa Transmission Powerline have been reported. For each impact identified, a series of strategic objectives have been recommended. These strategic objectives represent overall goals and outcomes sought by the industry in addressing each of the impacts or capitalising on opportunities. A supporting rationale to demonstrate purpose and industry intent and broad tactical strategies have then been developed to achieve the strategic objectives.



## 10.2 Project Impacts

Three alternative routes have been identified for the proposed development. The impacts identified through the consultative process with operators, cluster groups and visitors tended towards the identification of more negative impacts than positive impacts on either of the routes. It is important to keep in mind that all of the impacts identified through this study are perception based. The weighting toward more negative perceptions could possibly reflect the many 'unknowns' about the project, particularly given the limited amount of 'official' detailed information and the level of speculation about the Eskom-related project in the public arena.

In analysing the impacts reported, considerable time was spent isolating common themes as they relate to the tourism industry. It is noted that a number of respondents conveyed concerns over impacts that fall outside the scope of this study and it is assumed that these will be captured through other specialist's studies such as Social Impact Assessment. In the context of discussions held and the process of identifying potential impacts it was clear that many industry participants had limited detailed knowledge of the proposed Eskom Gamma-Kappa Transmission Powerline development. Consequently, for a large number of the operators the information provided by Nzumbululo Heritage Solutions (Project Environmental Practitioners) was the 'first they had heard' or the few known facts they had about the Eskom Gama-Kappa Transmission Powerline development project. To further complicate the matter, some stakeholders in the project area still submit response referring to Phase 1 Gamma-Kappa 765kV Powerline development which is already under construction in the project area and in some areas the construction is done.

During PPP meeting, communities were often critical of the fact that there was a distinct lack of information regarding the project and for citing that for this reason 'local' speculation could be rife and often incorrect. This was considered to be a major shortcoming in their ability to provide an informed position on the project. Key common themes regarding the potential impacts (both positive & negative) that the 2<sup>nd</sup> Eskom Gamma-Kappa Transmission Powerline development could have on the tourism industry in the region can be summarised under the following headings:

- In-Out Project Workforce
- Transport Activity
- Land and Housing
- Tourism Branding
- Road Closures and Access Disruption
- Local security and safety

Within each of these categories a number of points have been raised that are considered likely to have an impact on the tourism industry or represent opportunities to leverage benefits. Each of these categories is analysed in more detail in the following section including associated rationale and strategies to address

## 11 CATEGORIES OF MAIN IMPACTS OF THE PROPOSED POWERLINE DEVELOPMENT & RECOMMENDATIONS

### 11.1 In/Out Project Workforce-Impacts

#### IN/OUT PROJECT WORKFORCE-IMPACTS

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
High demand for short term accommodation along the project route during construction	Availability of visitor accommodation for the leisure/tour market. Knock on effect resulting in decreased sales	Construction	Medium	<ul style="list-style-type: none"> <li>Development of dedicated construction campsites along the powerline route construction areas.</li> <li>Ensure that the construction camps are closed camps</li> <li>Develop transportable short-term workforce accommodation to meet initial demand, but not within close proximity to main population centres.</li> </ul>	Proponent – Eskom & Contractors	Commitment gained from the project proponents (Eskom) with regard to all requirements for worker's accommodation. Specific details to be incorporated as part of overall approvals process and Agreements relating to the Project.
Presence and visibility of project work force (e.g. increase in traffic, etc.)	Tourism values, character and appeal of rural Northern and Western Cape atmosphere, ambience and relaxed nature of countryside. Tourism branding and destination marketing appeal	Construction	Critical	<ul style="list-style-type: none"> <li>Develop and implement processes that facilitate seamless transfer of Eskom/Contractor personnel to/from construction points</li> <li>Create transit lounge in Regional capital (regional capital) for project personnel who are being transferred to the construction sites and vice versa.</li> </ul>	Eskom / Contractors  Regional and capital Airports	Systems and processes relating to seamless transfer of Eskom/Contractor personnel to be incorporated into project agreements and EMPs and implemented prior to commencement.

Throughout the qualitative research phase, Western and Northern Cape tourism industry operators and stakeholders indicated that there is likely to be considerably more impacts for the industry through the construction phase. In the context of the construction phase, particular reference was made to the substantial In-and-out workforce required to build the Eskom Gamma-Kappa Transmission Powerline and the impact this may have on the region's nature reserves, private game reserves, commercial farms and bio-region especially the Karoo's reputation as tourism destinations.

It should be noted that stakeholder were advised during I&APs and PPP consultations and meeting that plans for the Eskom Gamma-Kappa Transmission Powerline included the development of a Construction Environmental Management Plan that will address issues such as worker's camp to house the workforce during the construction phase. Despite this, stakeholders remain sceptical as to whether this will happen and are of the view that visitor accommodation in the project area will still be impacted.

The local communities perceive that an in-and-out workforce could have potentially a negative impact on tourism in Western and Northern Cape for a number of reasons. Although not a universal view there is a strong sense of concern amongst many operators that visitor accommodation that would typically be used by leisure visitors (tourists) could be 'soaked up' by the Eskom and Eskom Contractor workforce. As one of the key criteria (availability of accommodation) for any successful tourism destination, any reduction in visitor accommodation inventory for the leisure market will undoubtedly have a 'ripple effect' across the industry, with a subsequent reduction in visitor numbers, and this will flow on in terms of tours, retail sales etc.

It was felt that many professionals such as engineers and technical experts would also be required during construction, with the likelihood that these personnel are more likely to be accommodated in luxury accommodation facilities along the powerline servitude in Western and Northern Cape region. Compounding concerns in this area is the view that the personnel engaged to build the 'construction camp' at the site will require accommodation during this period. However, on this basis many in the tourism industry have assumed that there is no current information to suggest how they will be accommodated if the existing accommodation properties in the project area will be utilised.

This view was not universal across the range of groups consulted along the project area. One respondent from the industry acknowledged the potential impact on existing tourism accommodation but also suggested that mobile accommodation was clearly an option to consider as evidenced in the following comment:

*"There will be less adverse impacts from construction on Karoo Bio-region as long as it is an in-and-out project and the workers are not housed in Western and*

*Northern Cape tourism facilities. They've got to have their own construction camp and the workers will drive in and drive out to main urban centres. It will take time and people to build the construction camp, but there is enough mobile accommodation to accommodate people building the construction camp ..."*

The tourism industry is also concerned about the potential level of contact an Eskom or Eskom Contractor workforce will have with leisure visitors to destinations in Northern Cape and Western Cape regions through private airstrips, tourism properties, nature reserves, private farms, retail shopping areas etc. The industry has expressed concerns in relation to the behavioural patterns and characteristics of an Eskom Contractor workforce. More specifically, these concerns stem from the distinct likelihood that the workforce may be mixing with leisure visitors to key areas in Northern Cape and Western Cape who are seeking a relaxed and exclusive or wilderness holiday experience. The comments below provide evidence of the concerns around this issue, noting again it is an impact based on personal perceptions:

*"No construction-related people should be allowed in on any nature reserve"*

*"Standards of behaviour of workers will need to be developed and enforced by Eskom"*

Anecdotally, a number of industry stakeholders were concerned about the visibility of the Eskom Contractor workforce in terms of the impact it may have on the character, atmosphere and ambience of countryside of Northern Cape and Western Cape regions. Uniform overall outfits, 4WD's and trucks with Eskom stickers and reverse alarms are representative of the typical elements the tourism industry associated with an Eskom powerline development workforce as evidenced through the following comments provided:

*"People's perceptions of countryside Northern Cape are likely to be influenced by the visibility and presence of Eskom contractor workers, trucks with huge construction equipment that 'beep' when they reverse etc."*

*"No construction-related vehicles or uniforms in the countryside of Northern Cape or Western Cape, so as to protect the holiday/aesthetic appeal of Western and Northern Cape (Karoo wilderness, pristine bio-region, nature reserves, commercial farming community, etc.)"*

A common view shared by the tourism industry across the project area is that the presence and visibility of a large Eskom Contractor workforce will potentially have a negative impact on the qualities and values of

Western and Northern Cape's rural or countryside character and appeal as a tourism destination. Results of the community's survey supported this view that Northern Cape and Western Cape regions as tourist destinations are not compatible with an Eskom large contract construction workforce culture to develop.

Taking into account the negative impacts identified by industry operators and stakeholders and from other relevant secondary sources, a series of strategic objectives and mitigation strategies have been developed.

#### **11.1.1 Strategic Objectives**

- To ensure personnel associated with all construction elements of the Eskom Gamma-Kappa Transmission Powerline development are accommodated on sites where they will interfere or disrupt the local visitor environment.
- To minimise the potential negative impact an Eskom and Eskom Contractor workforce may have on Western and Northern Cape's tourism industry in terms of visible presence, destination appeal, interaction with visitors and availability of tourism accommodation.
- To ensure an in-and-out Contractor culture does not develop in Western and Northern Cape areas affected by the proposed development - this culture relates to typical elements referred to in the body of the document including rowdy off-duty workforce, un-authorised access to local private property.

#### **11.1.2 Recommended Mitigation Strategies**

Insist the proposed construction camps are located within the approved Eskom Gamma-Kappa Transmission Powerline development servitude sites and that they will essentially be 'closed camps', thereby restricting off-site mobility for personnel whilst they are 'on or off duty'.

**Responsibility / Key drivers:** Eskom; Eskom Contractor, Northern and Western Cape Tourism Authority, Local Associations and Landowners.

Insist that all levels of provincial and local government and local tourism business negotiate and communicate strongly to ensure that any temporary / short term accommodation requirements are developed to meet initial construction needs, and are not located within close proximity to the main tourism destinations in the Northern Cape and Western Cape regions.

**Responsibility / Key Drivers:** Eskom, Provincial and Local Governments, Northern Cape and Northern and Western Cape Tourism Associations and businesses.

Develop and implement processes that facilitate the seamless transfer of Eskom Construction personnel through Northern Cape or Western Cape regions to and from servitude construction sites, including initiatives such as separate areas for construction helicopters, heavy equipment staging areas and logistics segregation and collection etc.

### **11.1.3 Rationale**

The strategies recommended in relation to the Eskom project workforce are designed to address the primary concerns held by the region's tourism industry. More specifically these strategies seek to achieve the following outcomes:

- Preservation and protection of the core values, qualities and attributes of Northern Cape and Western Cape's tourism industry.
- To minimise the presence and visibility of the Eskom construction workforce.
- To minimise the level of contact between the Eskom construction workforce and tourism visitors.
- To ensure a construction contractor 'culture' does not develop in country sides of Northern Cape and Western Cape through which the powerline will traverse.
- To preserve the destination appeal of Northern Cape and Western Cape regions.

Western and Northern Cape's tourism industry is clearly of the view, should the proposed development proceed along any of the alternative servitudes, that every effort should be made to ensure that the visibility and presence of the Eskom workforce is minimised. Industry feedback suggests that despite the fact that the majority of tourists are unlikely to physically see the powerline during its erection, they will see it indirectly through the presence and regular movement of a large Eskom and contractor workforce.

Strong industry views have been expressed that processes need to be developed to reduce the possibility of Eskom Contract workers and leisure travellers coming into contact. Both the tourism industry and local residents have openly proclaimed that they do not want an Eskom Contractor construction culture to develop in their areas be they in Northern Cape or Western Cape regions. Put simply, this perhaps implies that the Eskom Powerline development workforce needs to be 'invisible'.

Both Northern Cape and Western Cape's tourism values and attributes have been founded on a relaxed holiday atmosphere and unique ambience in country side, wilderness, pristine reserves, commercial farms etc. The tourism industry conveyed a strong need to ensure these strengths were preserved and this cannot be achieved if a in-out construction culture develops in the region during the proposed development period.

## 11.2 AIR AND TRANSPORT ACTIVITY IMPACTS

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
Increased helicopter activity and vehicle movement over the servitude	Character, ambience, holiday atmosphere and destination appeal of rural Northern and Western regions districts	Construction and Operation	Medium	<ul style="list-style-type: none"> <li>• Coordinate powerline development related helicopter activity not to interfere with local air traffic;</li> <li>• Coordinate powerline Development activities not to disrupt transport routes and goods, services and people movement in vicinity of servitude.</li> </ul>	Proponent – Eskom & Contractors; Aviation authorities; Road agencies	Integrate powerline development related helicopter activities with local aviation traffic; plan and time activities that may disrupt, people, goods and services movements in project area in such a way that the disruption will be minimal.

The proposed Eskom powerline development project may increase the volume of both passenger and cargo traffic at local airports or airstrips. If one take Cape Town International as the main port, given its international capacity, it is unlikely that the air traffic will be negatively affected. There are several private airstrips within the project area. Their operations may be affected during the construction of the powerline should the option of airlifting equipment and construction material is used widely.

Concerns raised by tourism industry stakeholders with respect to increased airport activity focused more on the movement of construction related helicopters rather than jet aircraft. Industry sentiment is clearly based on the perception that Eskom uses helicopter during powerline development and the movements will undoubtedly increase and the view that these aircraft are noisier and therefore more intrusive to the ambience and holiday atmosphere of Northern Cape and Western Cape regions.

There is concern over the possibility of main road and access road closures during the powerline installation. The most agreed approach would be to provide advance warnings wherever construction activities will most likely disrupt access and road usage at any point during the project. Where such disruptions would be unavoidable, proper and coordinated planning should ensure that these disruptions come during off-peak times when limited people would be moving or transporting goods.

#### **11.2.1 Strategic Objectives & Mitigation**

- To minimise the impact (noise and visibility) that increased airport activity will have on the ambience, character and holiday atmosphere of rural project area.
- To lobby for the limited road and access disruption emanating from construction activity.

**Responsibility / Key Drivers:** Eskom, Provincial Road Agencies, Provincial Tourism Authorities, Community Organisations; Local municipalities; local businesses.

#### **11.2.2 Rationale**

The management of construction related heliport activities is considered by the industry to be a major initiative towards addressing the impact of additional noise from helicopter movements. The industry is clearly concerned about the impact of the anticipated increase in activity will have on the ambience of the Northern Cape or Western Cape country sides and the tourism attributes for which they are widely recognised. The residents are also concerned that any disruption in road access will have negative consequences on their day-to-day operations and activities.

Every effort should be made and be communicated to ensure that these impacts are managed as recommended in the strategy.



### 11.3 ACCOMMODATION IMPACTS

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
Increased demand for accommodation uptake as result of Powerline development workers;	Availability of local accommodation especially during construction;	Construction	Medium	Relevant stakeholders work collaboratively and proactively in quantifying the land and local accommodation requirements to support the transmission powerline development and operation project, with future needs reflected in updated LEDs & IDPs.	Proponent – Eskom & Contractors; Local Authorities; Local Land owners	Accommodation needs quantified and planned for where need;

## 11.4 VISUAL, LAND AND ACCOMMODATION IMPACTS

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
Increase value of land as result of Eskom acquisition of powerline servitude.	Affordability of land within the final servitude area.	Construction and Operation	Medium	<ul style="list-style-type: none"> <li>Servitude leasing or acquisition arrangements to account for availability and affordability issues.</li> </ul>	Proponent – Eskom & Contractors; Local Authorities; Local Land owners	Land needs quantified and assessed in relation to the new servitude and in future land valuations and needs in the project area.

Visual impact is the most prominent impact that arises from construction of transmission powerlines. Powerline visibility and visual impact will directly influence three important elements of tourism value:

- Visual intrusion, which negatively changes the aesthetic characteristic of the landscape
- Visitor numbers, and subsequently occupancy levels; and
- Land values.

The land value, aesthetic and visitor numbers effects of the proposed powerline traversing through the landscape between Gamma and Kappa can be broken down as follows.

### 11.4.1 Impact On Perception of Western and Northern Cape Area's Offer of Authentic Eco-Tourism

The positioning of the Western Cape Province as South Africa's leading eco-tourism destination lends itself to renewable energy resource utilization and the establishment of an Eskom transmission line would not be first choice. Eskom generation has attracted a negative perception based on its over-reliance on coal-powered generation capacity. As such whenever there is an Eskom project such the proposed powerline, there is always the risk of criticism and bad publicity for the receiving area.

### 11.4.2 Strategy and Mitigation

Tourists have an expectation of obtaining basic services such as comfortable accommodation, secure accessibility to facilities, services and electricity, etc. However, development of the infrastructure that would guarantee these services also draws negative attention if not well presented. However, while Eskom is criticised for using coal fired power stations, the SOC is also embarking on major energy serving programs and alternative energy initiatives. These initiatives could be extended to small and overnight

Northern Cape and Western Cape area could benefit more in terms of *Green travel* compliance if they utilised renewable energy. This would assist in attracting the more discerning tourist that has a vested interest in sustainable tourism.

A good case would be that of the Karoo and environs region which has been positioned and is marketing itself an eco-tourism destination, alternative sources of electricity would better fit with their marketing efforts. There is need of tapping into Eskom's existing alternative energy initiatives that would be ideal to counter the negativity associated with Eskom projects. Cheaper sources of energy also would complement the affordable destination positioning Northern Cape and Western Cape project receiving districts have taken on.

#### **11.4.3 Impacts On Land Values And Livelihoods In Destination Communities**

The Scoping phase concluded that the Gamma-Kappa line does not prohibit tourism activities, current or planned. The main elements of the tourism resource base of the Western Cape province namely, nature, wildlife and agro and cultural heritage which are found in some of the project receiving areas of the province are very much aligned with eco-tourism and as such could to an extent be negatively impacted by the construction of the line. The mitigating factor is that the transmission line should not pass too near to many of the tourist accommodation and reserves therefore limiting impact.

The proposed three alternative servitudes would cut across farmlands, and in some cases divide the farms. It is believed that the value of these farms will be negatively affected by constructing the proposed transmission line on the vacant servitude. Should the proposed transmission line be constructed adjacent to the existing lines, the impact may not be as great, as these farms already have lines running across them and there are existing access routes for maintenance teams.

Land in the Northern Cape / Western Cape area is mainly used for agricultural or animal husbandry, commercial farming purposes with sections of built rural and urban settlements. Most of the commercial farms have been in the possession of the same family for generations, and farms are not often available for sale or transfer. The impact of the proposed overhead transmission powerline cables on farmland is not necessarily negative, but farmers and land owners are concerned about visual and cumulative impacts given the observation that there are pre-existing powerlines and other linear developments in the project area already. They are also seriously concerned about veld fires and their livestock being electrocuted. A key issue of concern relates to security and accessibility to their farms. They have very strong views and reservations about construction and maintenance teams entering their property.

## **11.5 Visual Impacts on Tourism**

Without a question, installation of any new structure in or construction of a powerline through a given landscape will alter the receiving environment permanently once the line becomes a permanent feature. However, the proposed Gamma-Kappa powerline is not a unique development in the receiving environment. There are several linear developments in the affected area – national and regional roads, access road, farm boundary fence lines, telecommunication lines, and transmission and distribution powerlines. Nonetheless, wherever the line will be installed, it will alter the visual aesthetics regardless of the existence of similar developments in the area. Be that as it may, powerlines have come to be part of the built-environment not only in Northern and Western Cape provinces but also across the country and anywhere in the modern economy world.

Crucial would be the location of the powerline in relation to existing infrastructure and other similar linear developments. The final route should therefore be integrated in situ minimising traversing through largely undeveloped landscapes. The objective would be to minimise visibility in areas, which are considered eco sensitive or bioregions such as the section that passes through the Karoo.

There would be temporary visual intrusions associated with the duration of the construction phase. These would be associated with the location, number and size of the construction camps and lay-down yards. Detailed information on temporary installations is not yet available at this stage of the project planning, however, it is anticipated that the visual impact will be localised and that only a limited number of tourists will likely be adversely affected by these project components during construction. The construction camps may however cause a higher visual intrusion on tourists visiting the open landscapes in the study area where the possibility of integrating it with existing settlements/towns is low. The potential visual impact on tourists during the construction phase can be mitigated with relative ease. The greatest factor to consider is the location of the construction camp out of potential visibility that may be experienced from scenic routes or tourist hotspots. Also see section on Accommodation Strategies.

## **11.6 Impacts on Bird Life For Tourism**

The impacts of powerlines on bird-life are a well researched factor which Eskom has invested considerable resources and developed technics to manage and mitigate whenever a powerline is developed. According to one study on avi-fauna and powerlines conducted by the Endangered Wildlife Trust for the *Eskom Transmission Spencer – Tabor 275 kV Transmission Line Draft Environmental Impact Report*, - the transmission line interactions can either be direct interactions, in which the bird comes into physical contact with the transmission line infrastructure, or indirect in which the transmission line infrastructure in some way impacts on the bird without coming into direct contact. Typically, direct interactions take the

perching. Indirect interaction is disturbance or habitat destruction as a result of activities relating to the construction or maintenance of the transmission line. Although these activities do not necessarily kill birds, they may impact negatively on birds.

Bird watching is a growing tourist activity in sections of the project's receiving environment. Any changes in the bird ecosystem are likely to impact on the bird-watching activities or bird-watching sites should the proposed powerline traverse through or near such sites. Having noted this potential impact, no specific or known bird-watching site has been identified within the proposed powerline servitude or its alternatives. As such, it is not anticipated that the proposed development will have unmitigatable impact on bird watching and related tourists activities in the project-receiving environment.

### **11.7 Impacts On Deforestation And Implications For Tourism**

The proposed powerline servitude will traverse sections of the sensitive Karoo eco region. This region offers some sections that are considered to be near pristine environment, with exotic plants and a great diversity of plant life. As such, this region draws considerable wilderness and cultural tourists routed through the Karoo Route initiatives. In the sandy environment on the Karoo removal of any vegetation may lead to massive soil erosion and the rapid degradation of the environment as a whole, as well as irreplaceable destruction of unique biophysical resources. As such, due care is necessary in construction planning not to impact on vegetation of the project area.

## 11.8 TOURISM BRANDING IMPACTS

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
Current and potentially future negative publicity relating to the Eskom Transmission project and its perceived impacts on the region's tourism values.	Visitor perception of Northern and Western regions destinations Core tourism values and attribute	Construction and Operation	Critical	Develop and publicly convey a standardised, factual response / message to combat false speculation regarding the proposed Eskom transmission Powerline Project and its impact on Northern and Western regions and districts as tourism destination  Development and implementation of mechanisms through which on-going regular visitor research can be monitored for the purposes of measuring and monitoring visitor perception and destination appeal	Proponent – Eskom Public relations; Tourism Authorities; Local tourism stakeholders	Funding commitment from proponent towards a sustained media campaign that conveys the 'facts' in relation to the impact of the Gamma-Kappa Transmission Powerline on tourism in the region.  To gain a funding commitment from proponent and related government agencies for the life of the project. The purpose of which is to conduct regular market research in order to measure industry performance and monitor visitor perception of the overall Eskom Powerline developments.
Media reference to tourism in the broader Western Cape Province area being impacted to the same level as Northern and Western regions areas by the Eskom Powerline Projects	Visitor perceptions and destination appeal of the broader Western Cape positioning	Construction and Operation	Critical	Develop a proactive and targeted tourism campaign that provides a clear distinction between Northern and Western regions region and the broader Western Cape in terms of tourism values and attribute	Proponent (Eskom), SA Tourism; Western Cape Parks and Tourism; Tourism Information	Secure funding for the purpose of developing distinctive separate tourism branding for Northern and Western District regions vs. the broader Northern or Western Cape Provinces
Industry sentiment regarding the need to proactively address any potential impact the Eskom Transmission Powerline Project	Potential for the project to negatively impact visitor perception and destination appeal	Construction and Operation	Critical	Secure commitment from proponent and relevant government agencies that marketing support for the tourism industry will be sustained over the life of the project  Strengthen existing Northern Cape or Northern and Western Cape Tourism associations through formal and informal	Proponent (Eskom), SA Tourism; Western and Northern Cape Parks and Tourism authorities; Tourism Information	Gain commitment from public entities that base funding for regional tourism marketing will be provided and indexed at applicable index measure for life time of Eskom Powerline Development projects.  Industry stakeholders to develop and implement an agreed operating model

Aspect	Impact	Project Phase	Risk Factor	Potential Mitigation Strategies	Responsibility/ Key Drivers	Desired Outcomes
may have on the tourism industry				<p>mechanisms, with a focus on achieving collaboration and sense of solidarity that facilitates and increase d level of corporative tourism marketing thereby industry spend and overall marketing effectiveness.</p> <p>Gain commitment from key stakeholders to ensure tourism marketing efforts are complemented by new and improved tourism infrastructure and amenities, thereby enhancing destination appeal of Northern and Western regions region.</p>		<p>that facilitates increased industry collaboration, cooperative marketing activities and improved marketing effectiveness.</p> <p>Commitment from key stakeholders in the project area to support tourism infrastructure development in the Northern and Western regions over the life time of the project.</p>

Throughout the qualitative research phase it has been widely acknowledged that tourism is good for Northern Cape and Western Cape regions in which the proposed powerline development is located. Logically, tourism operators and stakeholders rated tourism branding and associated visitor perception as the most critical element in terms of potential impacts on the local tourism industry.

Discussions from similar studies with tourism operators and industry associations saw constant reference made to the fact that considerable time, effort and financial resources have been invested over many years to establish and maintain a strong position in the highly competitive tourism market. The strength of this market position has been founded on consistent, sustained and focused marketing activities that have collectively built a recognised tourism brand for Northern Cape and Western Cape Regions.

It was evident during this and other similar studies that opinions with regard to the tourism values of the Western Cape Province and the specific Northern Cape and Western Cape are varied. Some operators referred to Northern Cape or Western Cape as being known for the Karoo wilderness values and unique natural attractions. Conversely, many commentators considered the wilderness values and attributes were more aligned to areas of the Western Cape region that lie further afield, with the key tourism values for Northern Cape and Western Cape being its relaxed holiday atmosphere, nature reserves, safari and game hunting retreating, game farms and multicultural heritage.

Based on visitor statistics for Northern Cape and Western Cape country sides it would appear that a considerable number of visitors also seek the Karoo wilderness and the nature and eco outback experience of the broader rural periphery Northern Cape and Western Cape regions. Despite differences of opinion on the tourism attributes of the project receiving environment, a common response from tourism operators and stakeholders interviewed was a high level of concern for the impact the Eskom Powerline development could have on tourism branding. These concerns relate directly to how the destination and appeal of Western and Northern Cape may be perceived by the broader population. This is reflected in the following feedback:

*‘The powerline has the potential to damage the Karoo and general country sides of the Northern Cape or Western Cape’s perceived remote, pristine image very badly, which could impact on visitor numbers in the longer term, if it’s not managed correctly’*

*“The Northern Cape and Western Cape have been marketed over many years as a wilderness and eco destinations and Ivory Route has an exotic outpost image. If that is lost, a lot of marketing effort would be greatly reduced”.*



However, this sentiment is not supported through the results of visitor surveys, where they perceive that the Eskom Powerline is not expected to change their perception of Northern and Western Cape countryside especially given the fact that this would be an add-on development to already similar existing developments. Furthermore, having been provided with details of the proposed powerline development through the survey process, majority of visitors surveyed responded that it would make no difference to their plans to return to Northern Cape and the Western Cape Districts.

Reference to the results of visitor surveys is not intended to discount the relevance of concerns raised by industry stakeholders. It is widely acknowledged that successful tourism branding is based on appealing to the emotive senses of visitors to influence perception. There is no doubt that positive perception of a remote region such as the Northern or Western Cape districts takes a long time to develop through concerted effort, and damage to that perception could be difficult to mitigate if it does occur. With this in mind, of particular interest was the view of many operators that the potential negative publicity about Eskom related development projects generated by parties opposing Eskom's carbon based power infrastructure is perceived to be potential impacting the region's tourism values. The following comments were recorded that demonstrated this industry sentiment:

*"There would be negative outcomes if environmental activists continues to run Eskom scare campaigns – which is what they are running – talking about Medupi Power Plant and mixing these issues with the proposed Shell Gas Freaking debate.... Tourism operates on perceptions"*

*"The way the Eskom lobby is painting it, they are creating a negative impact already for any Eskom related development project. That needs to be countered by some advertising and dissemination of accurate information."*

*"The "no Eskom" people, elsewhere, say powerlines, are expressing opinions without having all the facts. Some real basic information needs to be put out there sooner rather than later; otherwise tourists may see the planned powerline development in the same light as a negative whereas in reality, the northern and western cape regions are merely recipient of electricity generated elsewhere, probably where the real environmental impact would be felt...."*

When questioned as to what actions need to be taken in relation to tourism branding, an overwhelming response from industry operators and stakeholders was the need for government to make an on-going commitment to the Northern and Northern and Western Cape Tourism industry.

Tourism industry operators and stakeholders stressed the need to ensure that marketing support is proactive not reactive. Furthermore clear distinctions need to be made between Shell Gas Freacking in Karoo and the proposed transmission powerline developments across the rest of Northern and Western Cape regions from a branding perspective. Based on feedback provided by the tourism industry, the following strategic objectives and mitigating actions are recommended.

#### **11.8.1 Strategic Objectives**

- To seek a firm commitment from the Government and the developer (Eskom SOC) that they will provide all the support necessary (financial and other) through the appropriate channels to ensure that the market position and branding of the Northern Cape and Western Cape Districts tourism industry is not compromised by the proposed development.
- To proactively convey a consistent and positive message in the marketplace that the tourism values and attributes of Northern Cape and the Western Cape country sides will remain unchanged as a result of the proposed Eskom Gamma-Kappa Transmission Powerline Project.
- To offset the impact that current Eskom-related development negative publicity is perceived to be having on visitor perceptions of Northern Cape and the Western Cape regions.
- To strengthen and maintain the market perception of tourism in Western and Northern Cape and Western Cape.

#### **11.8.2 Recommended Mitigation Strategies**

- Develop a proactive and targeted tourism campaign for Western and Northern Cape project receiving regions that provides clear distinction between other Eskom developments such as the proposed powerline and the broader Northern and Western Cape Province in terms of tourism values and attributes.

**Responsibility / Key Drivers:** Eskom, Western and Northern Cape Tourism authorities, Local Municipalities, Tourism Associations, Tourism Information Centres.

- Obtain a firm commitment from developer (Eskom) and government (Local, provincial and national) that marketing support for the tourism industry will be sustained over the life of the powerline development Project.

**Responsibility / Key Drivers:** DEA, Eskom, Northern and Western Cape Tourism, District and Local Municipalities.

- Strengthen existing Northern and Western Cape Tourism industry associations through formal and informal mechanisms, with a focus on achieving collaboration and sense of industry solidarity that facilitates an increased level of cooperative tourism marketing, thereby maximizing industry spend and overall marketing effectiveness.

**Responsibility / Key Drivers:** Northern and Western Cape Tourism, District and Local Municipalities, Tourism Associations, Tourism Information Centres; local businesses and tourism operators.

- Develop and publicly convey a standardised, factual response / message to combat false speculation regarding the Eskom Powerline development Project and its impact on Western and Northern Cape as a tourism destinations.

**Responsibility / Key Drivers:** Northern and Western Cape Tourism, District and Local Municipalities, Tourism Associations, Tourism Information Centres; local businesses and tourism operators and Visitor Centres.

- To ensure tourism marketing efforts are complemented by new and improved tourism infrastructure and amenities, thereby enhancing the destination appeal of Western and Northern Cape.

**Responsibility / Key Drivers:** Northern and Western Cape Tourism, District and Local Municipalities, Tourism Associations, Tourism Information Centres; local businesses and tourism operators and Visitor Centres.

- Development and implementation of mechanisms through which on-going regular visitor research can be conducted for the purposes of measuring and monitoring visitor perception and destination appeal for Eskom Powerline and related infrastructure development across the province and the rest of the country.

**Responsibility / Key Drivers:** Eskom SOC; DTA; DEA; Northern and Western Cape Tourism, District and Local Municipalities, Tourism Associations, Tourism Information Centres; local businesses and tourism operators and Visitor Centres.

## **12 CONCLUDING REMARKS ON MANAGEMENT GUIDELINES**

### **12.1 Introduction**

Overall the proposed construction of the 2<sup>nd</sup> Gamma-Kappa 765 kV Transmission Powerline regardless of which of the three alternative routes is selected, will have some positive and negative impacts to the local tourism environment. The anticipated project impacts of the powerline development have been discussed in detail in previous section. Detailed strategies and mitigations have been presented in the previous section. This section focus on main conclusion and emphasise the over-arching management guidelines on actions already recommended to mitigate the potential negative impacts which will be created by the development of the proposed Gamma-Kappa 765 kV Transmission Powerline. Based on the assessment of the possible impacts, it is concluded that the benefits that comes with long term energy supply stability, investment in the overall Western Cape economy as result of confidence in energy and power supply outweigh the disadvantages from a tourism point of view specifically if the proposed mitigation measures are adequately applied. To a large extent, this study did not identify any prohibitive or permanent tourism barrier to the proposed powerline development from Gamma substation to Kappa in the Northern Cape and Western Cape Districts respectively.

### **12.2 Brief On Key Findings**

All three alternative powerlines route options do affect the receiving environment, particularly where portions of the proposed servitude traverse in vicinity of residential areas and tourism facilities and guest houses along the National Route 1 (N1) along the proposed Option 1 servitude. Therefore, Option 1 statistically affects most of the developed areas in existence along N1 and the N1 highway also triggers potential developments in the near future. This is particularly so because this N1 Highway is the main connecting route between northern Inland and coastal regions and pose as a corridor of development as highlighted by existence of many towns along the route. However, most of its development are on the north side of the national road.

Analysis of proposed route Option 2 servitude only affect or impact mostly the towns of Three Sisters and Beaufort West. Therefore, tourism related activities that might potentially be disturbed include residential guest houses or accommodation (Three Sisters and Beaufort West) and Private Game Reserves or Lodges (in Ceres and Karoo). Therefore, the most affected areas start from Biesiespoort in Victoria to Beaufort West. Then flows freely till it reaches Ceres where there is one affected private game reserve (Inverdoorn Game Reserve and Iziba Safari Lodge).

The proposed Option 3 servitude traverses through the north sections of Beaufort West town and the

National Park (Also see Point 31 & 32 in Appendix 1), Karoo golf Course (Point 31), Thornhill Game Lodge (Point 20) just to name the few. Besides disturbing some few farms along the way from Beaufort West towards Ceres, the powerline traverses in section where the Nova Vita Holiday Farm near Merweville (North of Point 36 & 37) is situated.

In considering the density of tourism and attraction area in the three alternate routes, option 1 is least favoured where as Option 3 has the least objection from PPP and stakeholder feedback and therefore suitable for the proposed development. In addition, Option 3 is characterized by higher percentages of stakeholders who did not respond to the survey or during PPP sessions.

Overall, the proposed development has relatively uniform potential impact on the receiving environment regardless of the route that is finally selected. The mitigation measures herein discussed are applicable to any of the routes as proposed or as amended.

However, in order to ensure that the positive impacts are maximized on the final route, and possible negative impact particularly on the local tourism brand, the landscape visual aesthetics and value on cultural landscape and commercial and nature reserves, specific management strategies and mechanisms already presented in detail in the previous sections that need to be incorporated into the development are emphasised here. The specific considerations that need to be included into the consolidated management strategies are:

- Planning;
- Land value & visual aesthetic – e.g. severance of existing tourism Property; and
- Communication.

### **12.3 Planning**

The most important approach to the nature of the proposed development is to maintain proactive public relations between the local community and the development proponent, Eskom SOC Holding. During the construction of the preferred route for the Gamma-Kappa 765 kV Transmission Powerline the planning should be in such a manner that it does not significantly disrupt the current flow of traffic along the main routes in the Western and Northern Cape Region. Construction activities should not be highly visible in a disruptive or interfering manner to the local activities such as nature tours in nature reserves that may be in the vicinity of the servitude. It is important however, to ensure that benefits are in fact generated and retained for the local tourist, wherever possible within the local tourism industry. One important manner to ensure that this does occur is to inform the local community and motorists when construction will start and when roads will be closed. In an unlikely event where powerline string would require any road, main, regional or local access, to be closed temporarily, shorter waiting periods should be implemented. Effective

## **12.4 Quality of life factors**

In the report it is illustrated that a number of quality lifestyle factors will be affected by the proposed powerline. This includes safety; increase people and vehicle traffic in usually quiet countryside, and noise pollution during construction emanating from heavy vehicles and probably helicopters lifting equipment and construction materials along the servitude. Measures to reduce these negative impacts could include the following:

- Safety can be increased by ensuring that only cleared employees working on the powerline project would be granted access to the servitude sections particularly those that are will be on private lands. This security element is crucial in the rural country sides of Western and Northern Cape where the line would pass through.
- Construction camps should be located in servitude portions that do not interfere with the local sense of rural ambience of quietness.
- Animal health regulations should also be implemented in areas where the powerline would traverse on commercial livestock or game farms.
- Construction activities should also be limited to specified working and land access periods agreed on between the contractors and the landowners neighbouring or providing access to the servitude and work sites.
- Access to private land should be controlled and observed as a health and safety regulations factor in the construction and operation EMPs.
- In no way should contractors and Eskom employee disrupt the local tourism accommodation availability or related access and operational activities.

## **12.5 Severance of Existing Tourism Property**

The development of the powerline may create some form of property severance should it cut through or in the middle of existing farmland or reserve which may affect the farming or conservation activities. For example crop farmers may not use certain land sections that have been severed by the powerline. It is important to ensure that these negative impacts are mitigated and that the benefits are created for the local tourism industry. Mitigation measures include:

- Valuation of existing properties so that market related value for properties can be offered where Eskom would require to acquire servitude rights;
- Assessing manners in which alignments are built along property borders and access roads alignments; and,
- Upgrading existing access roads during construction and for operational periods where the same roads would be used for powerline maintenance works.
- Where it is indicated that the powerline will pass directly through certain properties such as farm

for the powerline to deviate or by-pass such properties to ensure value and visual aesthetic of the local receiving environment. This also includes proposed future tourism development on any section of the proposed powerline servitude.

## **12.6 Communication**

The greatest threat to Northern and Western Cape tourism brand in relation to Eskom SOC Holding development initiatives is that, every time Eskom announces a project, environmental social activists link such development to Eskom's reliance on coal-fired power generations. This leads to high-level forms of misinformation and miscommunication of the facts about the specific proposed development. The observation that Eskom is among the highest green gas emitters through use of fossil fuels, make it easy for concerned parties to mobilise resistance to Eskom sponsored development. This emerged as a problem even for the proposed powerline where I&APs raise the issue regardless of the fact that the proposed powerline will not have any green gas emission problem in the immediate receiving environment.

To overcome miscommunication and communication barriers, clear lines of communication should be established with the local community, tourism information centers, local businesses and business associations, local farming unions, associations and organisations such the tourism associations, etc. and keep constant flow of information about the development of the proposed Gama-Kappa 765 kV Transmission Powerline. The following techniques may be implemented:

- Highlight that the proposed development will not directly lead to high Green Gas Emissions in the immediate receiving environment (such direct pollutions and emissions are limited to receiving environments where such fossil powered plants are located).
- Create a forum for the community, project steering committee members, establishment, tourism bureau and business owners and the development team;
- Monthly Newsletter;
- Monthly PSC meeting to express concerns and find solutions; and
- Post progress reports on Eskom SOC website.

## **12.7 Conclusion**

The various management guidelines have been presented in terms of the specific needs that will result regarding development of the proposed 2<sup>nd</sup> Gama-Kappa 765 kV Transmission Powerline. Regardless of the significant differences in the tourism sectors and characters of Western and Northern Cape Provinces, the management recommendations herein developed are applicable to specific conditions wherever they exist across the board. The management guidelines need to be read in conjunction with the impact analysis section, which describes the anticipated and estimated tourism impacts on the local tourism economy. These guidelines provide a broad description of ways in which possible negative impacts can be minimised to ensure a maximised benefit of the proposed Gamma-Kappa 765 kV Transmission Powerline. Overall, this TIAS did not identify permanent negative or prohibitive barrier to the developing the proposed powerline in any of the alternative servitudes. As such, this study supports the preferred route subject to it being the





### **13 GLOSSARY OF TERMS & ABBREVIATIONS**

**EIA** Environmental Impact Assessment: assessment of the effects of a development on the environment.

**I &Aps** Interested and Affected Parties

**DEA** Department of Environmental Affairs

**TIAS** Tourism Impact Assessment Study

**VF&R** Visiting friends and relatives

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## 15 APPENDIX 1: BRIEF RESULTS OF STAKEHOLDER CONSULTATIONS

Specific details of selected tourism sites and attraction zones and overall responses received per site.

Specific details of selected tourism sites and attraction zones						
T	Contacts	Email Address	Attraction or Activity	Location	Town or City/ Accommodation nearby	Responses
T 1	1. Tel. 023-414 3050  Tourism information: 023 - 415 1488	<a href="mailto:anmitch@telkomsa.net">anmitch@telkomsa.net</a> Amos	1. <i>Golf Course</i>	1. Karoo	Beaufort West SH	PR <sup>1</sup>
			Touws Local Authority Nature Reserve	Touws River	Touws River	No Direct Contacts
	Tel: + 27 (0)21 421-4998 (Agency)		Game Viewing at Aquila Game Reserve		Touws River: Western Cape	Agency doesn't provide direct contacts
			Horseback Safari at Aquila	Aquila Private Game Reserve	Touws River	
			Anysberg Nature Reserve,	Lies in Little Karoo between Ladismith, Laingsburg, Touwsrivier and Montagu, and is approximately four hours' drive from Cape Town	Touws River: Western Cape	
			Anysberg Horse Trail	Karoo	Touws River: Western Cape	
		Hex River Pass	links Worcester with Touws River	Worcester , Touws River, De Doorns		
+27 (0)23 316 1287	<a href="mailto:info@ceres.org.za">info@ceres.org.za</a> Shelly	Ceres Tourism Bureau	Ceres	Ceres: Wentzenburg	PR <sup>1</sup>	
T 1	+27 23 561 3011	<a href="http://matjiesfontein.com">matjiesfontein.com</a>	The Lord Milner Hotel	Matjiesfontein		Not Interested
T 2						
			Wagendrift Lodge	next to the Buffalo River, between Laingsburg and Ladismith	LAINGSBURG	Agency doesn't provide direct contacts

T 3	+27 21 657 1000 (Agency: Rooms for Africa.com)		Gal-Gihon	1 Station Street Laingsburg	LAINGSBURG	
			Die Blokhuis - Self-Catering houses on an Olive Farm	Location - Laingsburg, Central Karoo, Western Cape, N1, South Africa.	LAINGSBURG	
	Juan Botes on +27 (0)71 678-7147		Mad Mountain Marathon MTB Cycle	is a 3 day MTB stage race from Laingsburg to Sedgiefiel	Laingsburg	PR <sup>1</sup> , Not affected
T 4						
T 5						
T 6						
T 7	+27-79-288-7938   Fax: +27-86-626-6219	<a href="mailto:info.assendelft@gmail.com">info.assendelft@gmail.com</a>	Assendelft Lodge and Bush Camping	Central Karoo near the tiny hamlet of Prince Albert Road Station	Prince Albert	PR <sup>1</sup> , Far from the development.
	: +27 (0)23 551-1946		Diep en Deur 4x4 Trail	Witteberg Private Nature Reserve, near Laingsburg, Karoo	Wagendrift Lodge /Laingsburg	PR <sup>1</sup> , Far away from the Development.
T 8			Villa Kruger		Prince Albert	No Direct Contacts
			Fernskloof Wines			No Direct Contacts
	AGENCY: Travel Ground 0860 022 103	<a href="mailto:info@travelground.com">info@travelground.com</a>	Brakdakkie Guest Cottages	Central: Prince Albert	Prince Albert	Agency doesn't provide direct contacts
	AGENCY: Travel Ground 0860 022 103	<a href="mailto:info@travelground.com">info@travelground.com</a>	Bid Huisie	Central: Prince Albert	Prince Albert	
	+27 (0) 23 541 1929 or +27 (0) 82 882 5342	<a href="mailto:5342julie@karooview.co.za">5342julie@karooview.co.za</a>	Karoo View Cottages	Central: Prince Albert	Prince Albert	PR <sup>1</sup> , Far from development.
		Swartberg Pass	On the R328 through the Schoemanshoek Valley to the Cango Caves	Prince Albert	No direct Contacts	
T 9	+(27)827700206		Wolwekraal Nature Reserve	R353 (Kruidfontein Road), 4 km north of Prince Albert	Prince Albert	NR <sup>2</sup> , Power-cuts during development
			Prince Albert Olive Festival: April only	Throughout the town	Prince Albert	No direct contacts
	Regina and Dick Billiet Tel/Fax 0027(23) 5411267	<a href="mailto:info@saxecoburg.co.za">info@saxecoburg.co.za</a>	Saxe-Coburg Lodge -	Prince Albert / Karoo	Prince Albert	NA: Too far

	0861 227 362 or 021 483 0190	<a href="mailto:reservation.alert@capenature.co.za">reservation.alert@capenature.co.za</a>	Groot Swartberg Nature Reserve	Oudtshoorn district between the Great and Klein Karoo	Near Prince Albert	NA: Too far
T 10	Megan on 076 372 1666/ 023 541 1020	<a href="mailto:priender@mweb.co.za">priender@mweb.co.za</a>	Karoo Khaya Accommodation	Kruidfontein Station	Prince Albert	Not Interested
T 11	Phone: 0235212827 Mobile: 0823753201	<a href="mailto:gamkaolives@gmail.com">gamkaolives@gmail.com</a> <a href="mailto:jjb@mtnloaded.co.za">jjb@mtnloaded.co.za</a> jakobus	Gamka Olives Farm Accommodation	Central Karoo	Leeu Gamka	Re-email, Resend, 22 dtailed map
	Ronel 0832254325 or Blikkies 0824479827	<a href="mailto:ronel@bergplaats.co.za">ronel@bergplaats.co.za</a>	Bergplaats Game Lodge		Leeu Gamka	Not Interested & NR <sup>2</sup>
T 12	Bertha: 021-9134802 OR Cell : 082-8711925	<a href="mailto:bertha@mweb.co.za">bertha@mweb.co.za</a>	B's Place- Self Catering Apartment/ Flat in, Western Cape, South Africa	Welgemoed	Welgemoed	Mail Tuesday Claim to be busy: Not Interested.
T 13						
T 14	27 (0)23 415-2308		Christian Barnard Museum (Beaufort West)	Beaufort West, Karoo	Beaufort West	No direct contacts
T 15	023 4152753	<a href="mailto:info@kokatsara.co.za">info@kokatsara.co.za</a> Gail,	Ko-Ka Tsara Game Reserve	Nuweveld Mountains (Great Karoo), 8 Kilometers outside Beaufort West	Beaufort West	Remail, Wed 23
T 16	+27 (0) 23 415 2828 / 9 OR 0861 801 802 +27 21 710 5800 (Agency)		Nature Reserves in Karoo National Park	Karoo National Park		
T 17						
T 18						
T 19						
T 22	Local: 0861 801 802 International +27 21 710 5800 (Agency)		Joalani Gasteplaas	Along N1	Biesiespoort	Agency doesn't provide direct contacts
	Contact : Izak & Anel van Heerden Tel : 049 8519050 Cel (1) : 076 5923966 Anel Cel (2) : 083 2650851	<a href="mailto:izakvanheerden@telkomsa.net">izakvanheerden@telkomsa.net</a>	Skietkuil Bed & Breakfast Farm	close to N1	Biesiespoort, Richmond	Pdf, Moore' Claim to be busy Re-mail again

	Izak					
DN 2						
T 21	Contact : Annalise Marais Tel : 049 8519402 Cell : 083-2842460	<a href="mailto:daantaibois@mtnloaded.co.za">daantaibois@mtnloaded.co.za</a> fax no:	GaMamadi Guest Farm	Near Three Sisters	Three Sisters	NR <sup>2</sup> , Construction destroys grazing land for sheep
	Erika Marais – 0829239603 Henk Marais – 0826876495	<a href="mailto:info@desertdewguesthouse.co.za">info@desertdewguesthouse.co.za</a>	Desert Dew Guest House	Three Sisters	Three Sisters	NR <sup>2</sup> , damages environment during development
T 22	N/A					
T 23						
T 24						
T 25						
T 26						
T 26:						
T 27						
T 28						
T 29						
T 31	Tel: +27 (0) 72 202 0408 023 414 2309 John	<a href="mailto:reservations@nagenoeg.co.za">reservations@nagenoeg.co.za</a>	Nagenoeg Guest House	Located 8 km from Beaufort West, and 1.5 km from the N1.	Beaufort West, Western Cape,	Doesn't have resources to use email, but NR <sup>2</sup>
	Contact : Joyce Tel : 023-4144772 Cel (1) : 082 8937330 Cel (2) : 083 5300014	<a href="mailto:info@the3chimneys.co.za">info@the3chimneys.co.za</a>	The Three Chimneys Guest House Accommodation	16 Donkin Street in Beaufort West, Klein & Groot Karoo	Beaufort West	NR <sup>2</sup> , Power-cuts during development
	Mariori: 076 333 2182	<a href="mailto:mariori@capekarooquesthouse.co.za">mariori@capekarooquesthouse.co.za</a>	Cape Karoo Guest House	Beaufort West, Western Cape	Beaufort West	Respon wed 23
	Tel: 023 415 2268 Cell: 084 50 66 3 66	<a href="mailto:info@oldhouse.co.za">info@oldhouse.co.za</a> Bronwyn	Old House Luxury Guesthouse	31 Voortrekker Road/ Central	Beaufort West	Forwarded to her boss but She has not responded and Thers No Dir

						No
T 46	Tel: +27 (0)214 344 639	<a href="mailto:info@inverdoorn.com">info@inverdoorn.com</a> Lorna	Inverdoorn Game Reserve and Iziba Safari Lodge	situated in the Ceres Karoo	Ceres	NA
DN 3						
T 20	Tel: 0860 022 102 International customers: +27 21 201 8900 (Agency)	Alternatively, email <a href="mailto:bookings@travelground.com">bookings@travelground.com</a>	Travalia Guest Farm	Situated 500 m from the N1 highway and 1 km south of the Shell Ultra City Three Sisters.	Three Sisters	Agency doesn't provide direct contacts
	Mathilda & Ferdie Moll Tel (053) 621 1910 Cell: 0823208186	<a href="mailto:thornhillgamelodge@telkomsa.net">thornhillgamelodge@telkomsa.net</a>	Thornhill Game Lodge,	Off N1, Three Sisters, Beaufort West	Three Sisters	NR <sup>2</sup> , Nuisance To people
	Contact : Patrys van der Merwe Cel (1) : 082 5767662 Cel (2) : 082 7759333	<a href="mailto:elandsrus@vodamail.co.za">elandsrus@vodamail.co.za</a> Jan Hendrik	Elandsrus Country Lodge	Elandsfontein Farm Three Sisters	Three Sisters	PR <sup>1</sup> : but they must get the share for disruption of construction
T 24	Tel : +27 (0)82 446-0228 Mobile : +27 (0)82 446-0228	<a href="mailto:taaiboschfonteinguestlodge@gmail.com">taaiboschfonteinguestlodge@gmail.com</a> <a href="mailto:taaiboschfontein@vodamail.co.za">taaiboschfontein@vodamail.co.za</a> <a href="mailto:susan@tynedale.co.za">susan@tynedale.co.za</a> Malcolm: 021 876 4543/021 876 3568	Taaibochfontein Karoo Farm (Accommodation)	is an oasis 14km off the N1 at the foot of the Nuweveld mountains	Three Sisters	Re mail tue 22
T 29	Contact: Zwingli & Marion, Tel: (0)23 414-4434, Mobile: +27 (0)73 206-6347	<a href="mailto:mail@woodapple.com">mail@woodapple.com</a>	Haus Holzapfel Accommodation / Self Catering Suite / Self-Serve Breakfast	Beaufort West, Western Cape	Beaufort West, Western Cape	PR <sup>1</sup>
	Telephone: +27 (0)72 235-1891 or +27 (0)23 415-3226	<a href="mailto:info@karoobackpackers.com">info@karoobackpackers.com</a> Joann	Donkey Cart Tours	25 Donkin Street, Clyde House	Beaufort West, Karoo	Forwarded to her boss, He seems busy all the time
	Tel : 023 4143744 Cell : 083 3669784	<a href="mailto:treetopguesthouse@iset.co.za">treetopguesthouse@iset.co.za</a> Marianna	Tree Top Guest House	17 Bird Street	Beaufort West Western Cape South Africa	Invalid email address
	Tel: 023-414 2145	<a href="mailto:reservations@intekom.co.za">reservations@intekom.co.za</a>	The Wagon Wheel Country	North Beaufort West,	Beaufort West,	Forwarded to her



		Nicoline, Diana: <a href="mailto:rkoster@mweb.co.za">rkoster@mweb.co.za</a> Please can you contact the owner Mr. Philip Price at Cell 082 652 5320	Lodge	500m towards the Johannesburg side of town.	Western Cape	boss, He seems busy all the time
T 31	Tel: +27 (0)23 415 2828 / 9 0823177854	<a href="mailto:brianvdw@sanparks.org">brianvdw@sanparks.org</a> <a href="mailto:brian.vanderwesthuizen@sanparks.org">brian.vanderwesthuizen@sanparks.org</a>	Karoo National Park	The park is situated 12km from Beaufort West	Beaufort West, Western Cape	NR <sup>2</sup>
T 32						
T 33						
T 34						
T 35						
T 36	Andre or Suzaan Theron: +27 2062 ask 1403		Nova Vita Holiday Farm	Near Merweville	Merweville	No Direct Contact

POSITIVE RESPONSE (SUPPORT); NR<sup>2</sup>= NEGATIVE RESPONSE (OBJECTION); NA= NOT APPLICABLE; NDC: NO DIRECT CONTACT; NDA: NO DIRECT CONTACT (AGENCY)

ONSE IN TOTAL: PR<sup>1</sup>= 8 (19%);

8 (19%);

3 (7%)

: 5 (11%)

: 7 (16%)

ESPONSE= 12 (28%)

√ ALL= 43

## 15.1 RESPONSE TO QUESTIONNAIRES

The overall questionnaire recipients total a number of 43:

- PR<sup>1</sup>= 8 (19%);
- NR<sup>2</sup>= 8 (19%);
- NA= 3 (7%)
- NDC= 5 (11%)
- NDA= 7 (17%)
- NO RESPONSE= 12 (28%)

Out of the 19% of Positive (in Support) responses, 12% is located in Option 1 due to the fact that most of them are not affected as these activities lie at a far distances (particularly POINT 0 – to – POINT 9). Therefore, the other 7% is located in Option 2 and 3 respectively. In addition, Option 1 is also affected by the fact that most (15% out of 17%) the activities (land uses) use Agencies that do not want to provide direct contacts simple because that is how the agencies make money. Also there are no direct contacts to most attractions/ activities in Option 1 (i.e. 9% out of 11%).

Whereas most (9%) of the 19% of Negative responses (In Objection), lie in Option 2 and a 5% lies in both Option 1 and 3 respectively.

Again 17% out of 28% of people who have not responded are located along Option 1. Whereas the 11% is being shared between Option 2 and 3.

## 15.2 KEY CHALLENGES

The challenges encountered include the following points:

- Not getting direct contacts to most farms and tourism facilities.
- Also not getting direct contacts to some of the guest houses as they rely on travel and accommodation agencies, which refused to provide direct contacts unless one has placed a booking (that is how they make money).
- Most management in some activities claim to be a lot be busy and that is why they took time to respond to the questionnaires.
- Some activities claim not to have resources (e.g., computers, internet, etc.) in order to respond to the questionnaires unless the documents are faxed. (E.g. Nagenoeg Guest House in point 31).
- Some are just not interested to partake in this process (E.g. Karoo Khaya Accommodation, Option 1, and Point 10).

- All in all, poor response was the main cause that delayed the project.

## 16 APPENDIX 2: STATE OF TOURISM IN SOUTH AFRICAN PROVINCES

Figure A1: Overview of tourism expenditure.

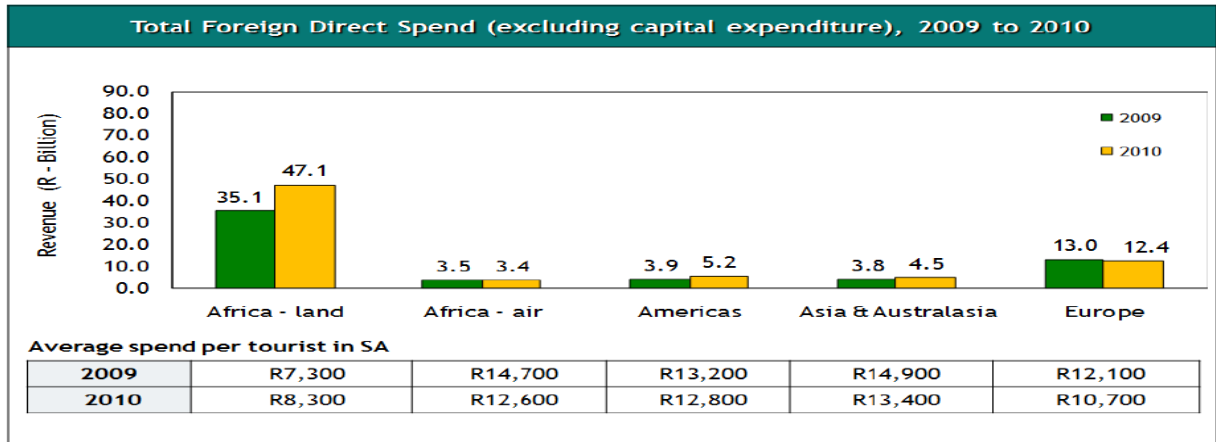


Figure A2: Visitor analysis for all regions of South Africa.

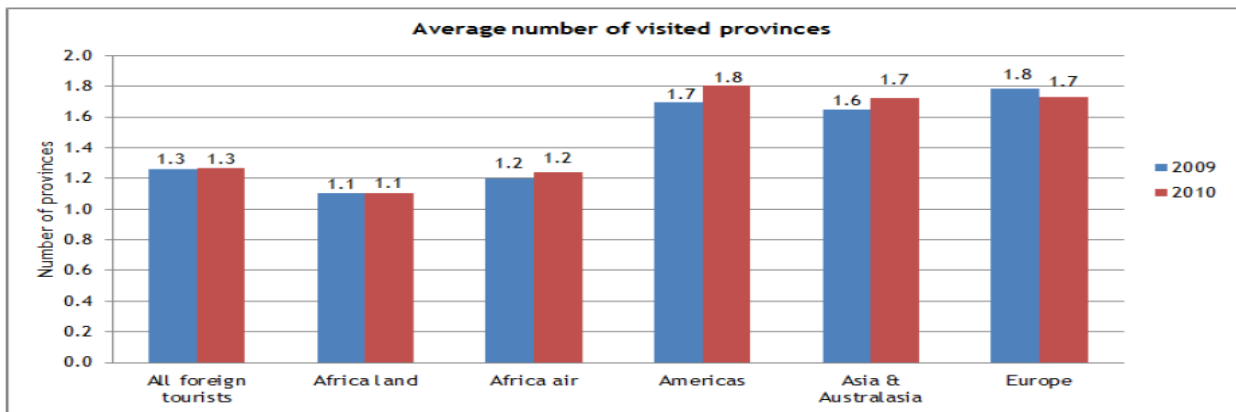


Figure A3: Foreign tourist distribution for South Africa per province.

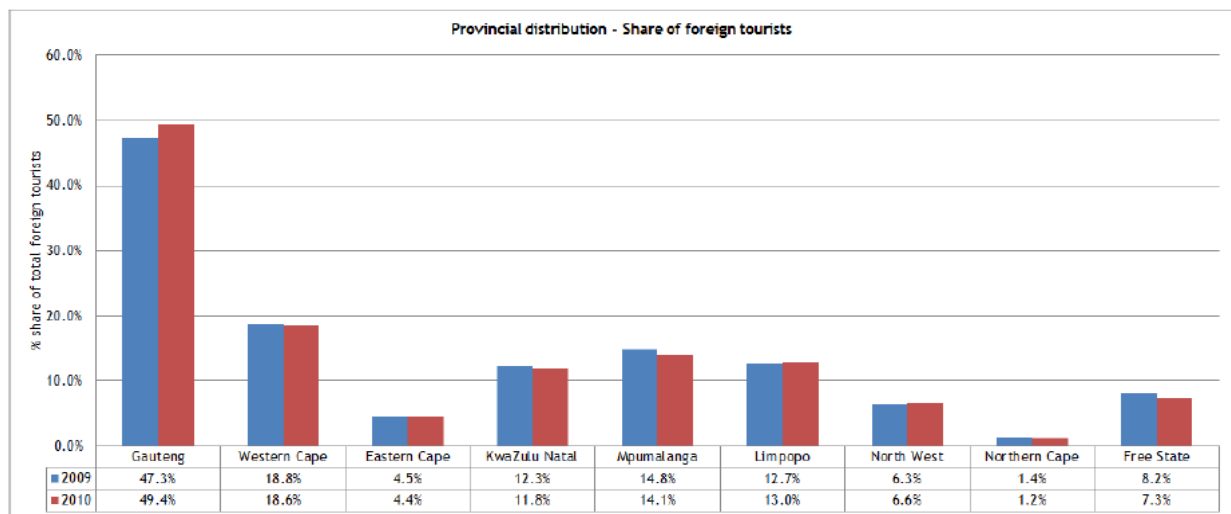
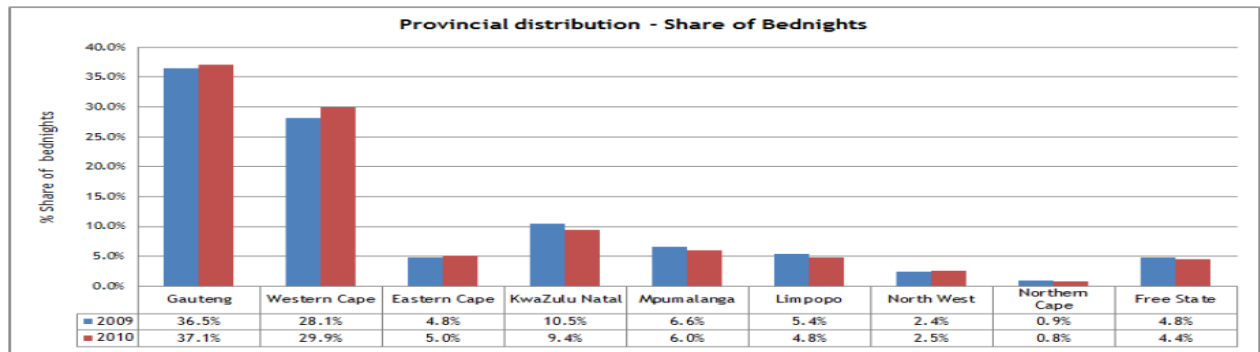


Figure A4: Distribution of bed nights per province across South Africa.



Provincial Distribution - Share of Bednights										
	Gauteng	Western Cape	Eastern Cape	KwaZulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State	
Land Markets	21.0%	6.4%	0.8%	4.1%	3.4%	3.4%	1.8%	0.3%	3.9%	
Air Market	16.1%	23.4%	4.2%	5.4%	2.6%	1.4%	0.8%	0.4%	0.6%	

Figure A5: Distribution of night spent by accommodation typology across the country.

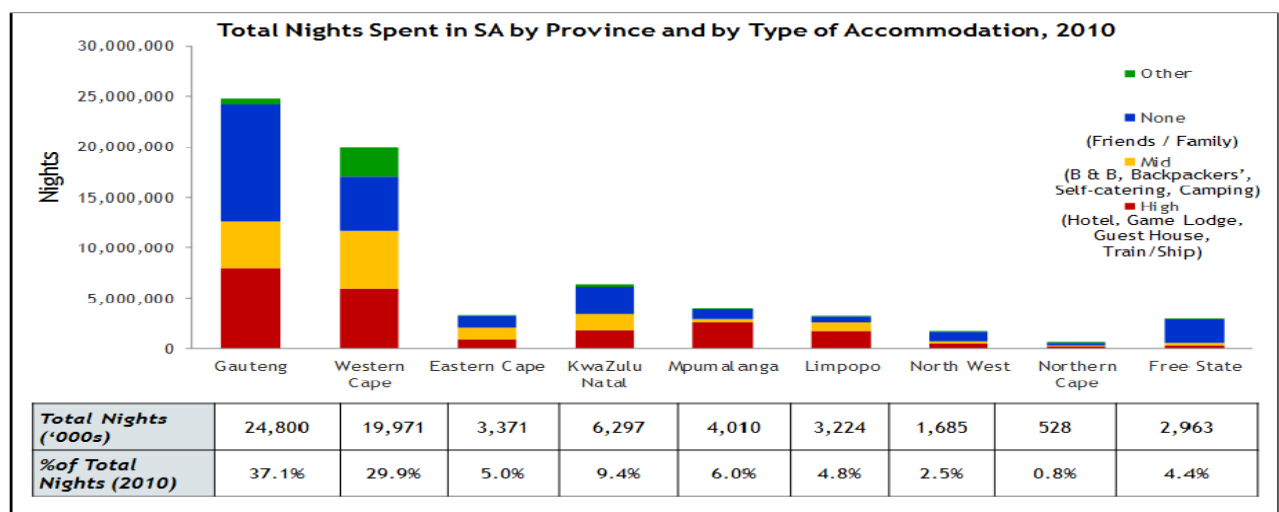


Figure A6: Foreign direct spend per province.

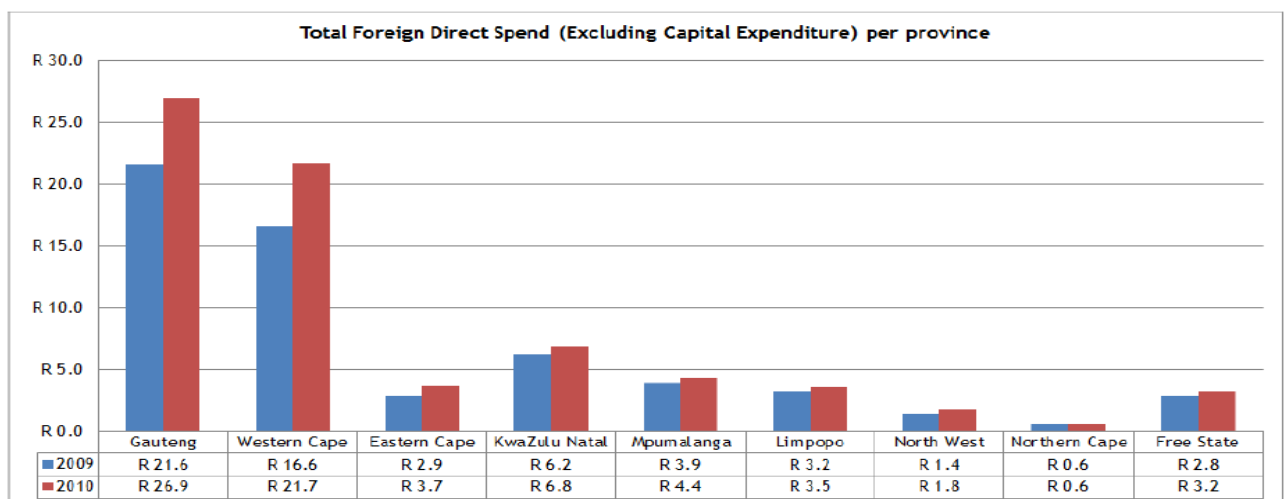


Figure A7: Main destination by main purpose of visit for domestic overnight trips

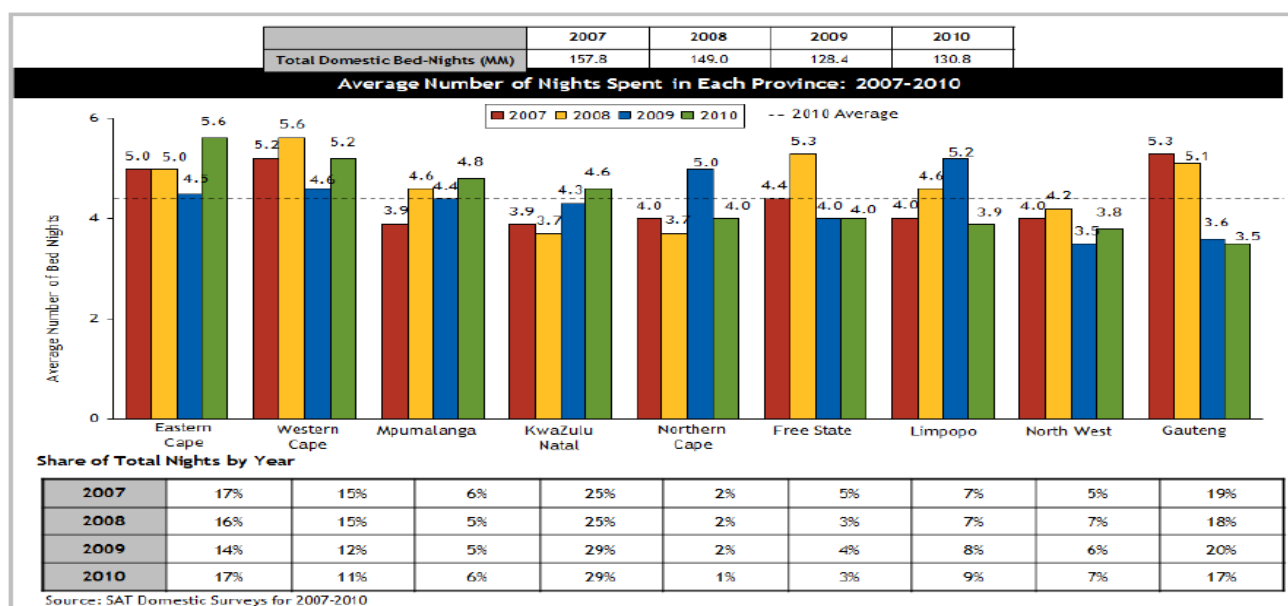


Figure A8: Source of tourist arrivals to South African Provinces (Source, SAT).

COUNTRY IMPORTANCE TO PROVINCE ARRIVALS* - 2010									
* Indicates the provinces visited and not provinces where nights were spent.									
*This tables show arrivals to Province X, by source country.									
	Gauteng	Western Cape	Eastern Cape	KwaZulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
<b>AFRICA &amp; MIDDLE EAST</b>	75.6%	25.1%	19.9%	61.7%	71.2%	91.5%	69.9%	65.4%	89.5%
Angola	0.8%	0.3%		0.2%					
Botswana	6.2%	0.5%	0.8%	3.0%		0.4%	46.7%		
DRC	0.6%	0.2%							
Kenya	0.5%	0.2%	0.4%	0.2%					
Lesotho	15.5%	2.1%		13.1%			11.6%		82.3%
Malawi	3.4%	0.7%		2.3%	0.8%				1.2%
Mozambique	10.7%	4.5%		3.6%	53.5%				
Namibia	1.1%	8.1%						54.9%	
Nigeria	0.9%	0.4%		0.4%			0.3%		0.3%
Swaziland	7.8%	0.3%		22.3%	10.9%	0.8%			
Tanzania	0.3%	0.2%							
Zambia	3.6%	0.5%		2.8%					1.5%
Zimbabwe	21.9%	4.6%	8.4%	11.8%	3.7%	89.1%	5.6%		2.3%
Other Africa and Middle East	2.3%	2.5%	2.3%	1.2%	0.6%	0.2%	1.8%		0.4%
<b>AMERICAS</b>	6.3%	14.3%	14.5%	7.8%	6.9%	2.8%	8.0%	5.8%	2.0%
Brazil	0.9%	1.7%	0.9%	1.5%	0.4%		0.6%		
Canada	0.7%	1.8%	2.3%	1.1%	1.0%	0.3%	0.7%	1.4%	0.4%
USA	3.6%	9.2%	8.7%	4.4%	4.7%	1.9%	5.1%	3.9%	1.3%
Other Americas	1.0%	1.5%	2.6%	0.8%	0.7%	0.5%	1.6%		
<b>ASIA &amp; AUSTRALASIA</b>	6.0%	10.3%	7.8%	7.0%	3.6%	0.9%	10.3%	2.8%	1.7%
Australia	1.5%	3.1%	3.4%	3.1%	2.2%	0.5%	2.1%		0.7%
China (including Hong Kong)	1.4%	2.6%	0.9%	0.6%	0.3%		4.5%		
India	1.2%	1.2%	1.1%	1.1%	0.3%		1.7%		
Japan	0.4%	0.8%		0.5%	0.1%				0.5%
Other Asia and Australasia	1.5%	2.6%	2.1%	1.8%	0.7%	0.2%	1.8%		0.2%
<b>EUROPE</b>	12.2%	50.3%	57.9%	23.5%	18.3%	4.8%	11.8%	26.1%	6.7%
France	1.4%	3.8%	3.3%	3.4%	3.1%	0.5%	1.1%	1.7%	1.0%
Germany	1.5%	9.6%	11.7%	3.5%	2.8%	0.5%	1.2%	7.2%	0.9%
Italy	0.6%	2.2%	1.9%	0.8%	1.2%	0.2%	0.5%		
Netherlands	1.1%	4.5%	5.9%	2.4%	2.2%	0.6%	1.1%	2.7%	0.6%
Sweden	0.3%	1.7%	2.1%	0.5%	0.6%	0.1%	0.4%		
UK	4.2%	18.3%	20.9%	7.4%	4.5%	1.3%	4.0%	6.5%	2.3%
Other Europe	3.1%	10.2%	12.0%	5.5%	4.0%	1.6%	3.4%	6.2%	2%
<b>ALL FOREIGN TOURISTS</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

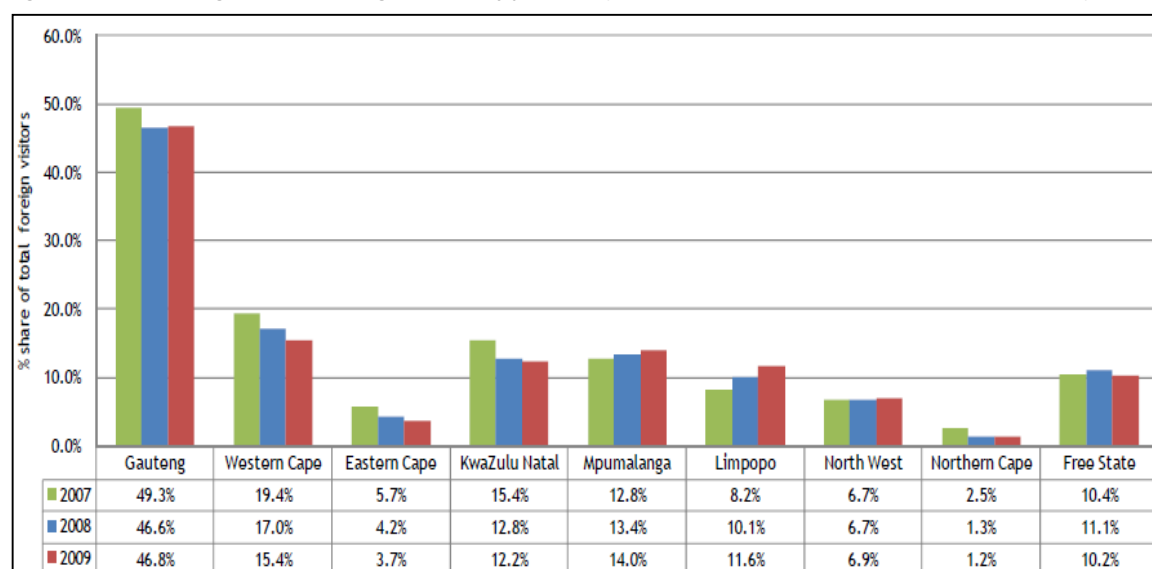
Notes:  
The table represents the provinces visited by each segment and should be read from left to right.  
Blank cells indicate that the sample was not big enough for a valid statistical interpretation

Figure A9: Tourist typology distribution across South Africa (Source Domestic Tourism Survey 2009 Statistics South Africa).

Destination	Leisure/vacation/holiday	Shopping – business	Shopping – personal	Sporting – spectator	Sporting – participant	Visiting Friends or relatives	Funeral	Business/professional	Business conference	Study/educational trip	Medical	Wellness	Religious	Other	Total
Western Cape	60,0	0,6	0,0	0,1	0,2	31,9	3,3	1,2	0,2	0,3	1,1	0,0	0,5	0,6	100,0
Eastern Cape	33,2	0,0	0,0	0,1	0,0	49,4	9,1	0,8	0,0	0,4	1,0	0,1	3,3	2,5	100,0
Northern Cape	32,7	0,0	1,6	0,0	0,0	45,5	10,4	2,8	0,0	0,3	2,4	0,0	0,6	3,6	100,0
Free State	23,5	0,3	0,3	0,3	0,6	50,5	12,9	1,8	0,1	0,4	1,2	0,0	2,6	5,5	100,0
KwaZulu-Natal	27,1	0,2	0,5	0,5	0,5	56,2	6,3	1,1	0,1	0,8	0,5	0,1	3,4	2,7	100,0
North West	13,1	0,3	0,2	0,0	0,6	55,3	19,4	1,5	0,2	0,9	0,5	0,0	2,3	5,6	100,0
Gauteng	14,7	2,0	0,6	0,0	0,2	62,0	7,3	1,7	0,1	2,4	1,5	0,0	3,3	4,3	100,0
Mpumalanga	15,2	0,6	0,0	0,0	0,1	64,4	9,2	1,5	1,6	0,4	0,6	0,0	2,3	4,1	100,0
Limpopo	10,2	0,0	0,3	0,0	0,2	63,3	13,3	1,7	0,0	0,3	0,3	0,0	7,4	3,1	100,0
<b>Total overnight trips</b>	<b>2 402</b>	<b>47</b>	<b>29</b>	<b>15</b>	<b>27</b>	<b>5 177</b>	<b>862</b>	<b>130</b>	<b>23</b>	<b>72</b>	<b>79</b>	<b>3</b>	<b>319</b>	<b>306</b>	<b>9 490</b>

Northern Cape’s share of the tourist arrivals in South Africa is the lowest in country averaging less than 2.5% compared to Western Cape’s above 15%.

Figure A10: Percentage share of foreign Tourist by province (SA Tourism, Annual international tourists, 2010).



## **17 APPENDIX 3: NATIONAL, PROVINCIAL AND LOCAL TOURISM POLICY FRAMEWORKS**

Tourism is a priority development area for the national and provincial governments. As such, there are several inter-linked and independent policies, documents, and frameworks, guidelines that are relevant to any tourism study such as this Impact assessment. The following reviews provide a contextual environment in which the significance of tourism sector may be understood in this report.

### **17.1 National Policies and Framework**

The following are some of the significant national policies and frameworks:

- White paper on the development and promotion of Tourism in SA, 1996 – which is currently under review;
- Institutional Guidelines for Public Sector Tourism Development and Promotion in SA, 1999;
- Tourism Infrastructure Investment Framework, 1999;
- National Responsible Tourism Guidelines for South Africa, 2002;
- Tourism BEE charter scorecard;
- South African Tourism Growth Strategy, 2001;
- Domestic Tourism Growth Strategy, 2004;
- The Tourism, Hospitality, and Sports Education and Training Authority (THETA)

### **17.2 Local Policies and Framework**

Equally, when one draws down to tourism at local levels, the following would be significant:

- Municipal Structures Act (Act 117 of 1998);
- Municipal System Act (Act 32 of 2000);
- Northern Cape District Municipality IDP & LED;
- Western Cape District Municipality IDP & LED; and
- Project receiving Local Municipalities IDPs.

### **17.3 The White Paper on the Development And Promotion Of Tourism In South Africa, 1996**

The Minister of Environmental Affairs and Tourism appointed an Interim Tourism Task Team (ITTT) in October 1994 with the mandate of drafting a tourism discussion paper as a basis for future national policing. The ITTT comprised of representatives of the business sector, tourism stakeholders, provincial governments, community organisations and national governments. In compiling the White paper a great



deal of emphasis was placed on maximum participation by all. The White Paper views, South Africa as having enormous tourism potential with its competitive advantage lying in its diversity. However, despite this strong competitive advantage the White Paper acknowledges that it is not the stock of our natural resources that will determine our competitiveness, but rather, how these resources are managed and to what extent they are complemented with man-made innovation.

The White Paper outlines that the significant tourism potential in South Africa is not being capitalised upon as a result of:

- Inadequate resources and funding;
- A myopic private sector;
- Limited integration of local communities and previously neglected groups into tourism;
- Inadequate tourism education;
- Inadequate protection of the environment;
- Lack of infrastructure, particularly in rural areas;
- A ground transportation sector not geared to service tourism; and
- A lack of inclusive, effective, national, provincial and local structures for the development, management and promotion of the tourism sector.

In order to enable the maximisation of opportunities identified and approved in the tourism sector the White Paper outlines a diversity of guidelines that can facilitate tourism (and economic) growth. Such guidelines include:

- Principles for the development of responsible tourism;
- Key conditions critical to the success of tourism;
- Objectives that will ensure sustainable and competitive tourism based on global best practices that are socially, environmentally and culturally responsible tourism;

A critical area that deals with the implementation of all policies, legislation etc. is the institutional arrangements. The White Paper indicates that the responsibilities associated with carrying out tourism mandate lie with:

- Government (National, Provincial and Local Government); and
- Statutory bodies (National, Provincial and Local Government)

The government's responsibility is largely one of policy making, planning and facilitation but it can also implement strategies and carry out certain developmental programmes.

1. Department of Environmental Affairs and Tourism (DEAT);
2. South African Tourism (SAT); and
3. Provincial Tourism Organisations.

Although the White Paper was developed at national level, it provides an overarching framework to guide tourism development across South Africa. In this respect it allows for the alignment of national, provincial and local tourism development to ensure “that everyone pulls in the same direction”. The White Paper does not address specific requirements on provincial or local level, nor does it provide the required strategic direction. Provincial and local governments therefore need to align to, and take guidance from the National White Paper when developing their own tourism development strategies as it pertains to the specific dynamics present.

#### **17.4 Institutional Guidelines for Public Sector Tourism Development and Promotion in SA, 1999**

The Inter-provincial Technical Committee of MINMEC (a joint forum of ministers responsible for tourism matters) compiled the Institutional Guidelines, published in 1999. It seeks to formulate the institutional system and mechanisms to facilitate synergy in the management of tourism between the various tiers of government. The document further provides clarity on the roles, responsibilities and allocation of funding at national, provincial and local Government level to inform intergovernmental co-ordination on matters regarding tourism

Specific guidelines and conditions with regards to the roles and responsibilities at each level of government are provided. The issues addressed and the respective guidelines in terms of the roles and responsibilities of the FTM at local level include the following:

- Introduction of tourism legislation – alignment of local by-laws and regulations with national and provincial tourism policy;
- Establishing international relations and agreements – reaching agreements with cities/local authorities in other countries, with the knowledge of national and provincial government;
- International tourism marketing and promotion activities – exposure of local areas within the framework of national marketing strategies and aligned to such;
- Domestic tourism marketing activities – develop domestic marketing strategies in line with provincial marketing framework;
- Provision of tourism infrastructure – providing local infrastructure taking cognisance of provincial tourism strategies;
- Setting of tourism standards – annual inspection, certification and registration of tourism establishments; Promoting tourism awareness – plan and implement programmes to improve

- Tourism training – assist in the implementation and promotion of national and provincial training programmes;
- Establishing tourism incentives, investment and financing programmes – provide advice and assistance to emerging entrepreneurs in coordination with provincial investment framework;
- Tourism information management – provide appropriate information as input to national and provincial systems;
- Domestic tourism information dissemination – establish local tourism information offices; Tourist guiding training – work in collaboration with provincial authorities to ensure representative curriculum content;
- Tourism development – lead tourism development in the area of consultation with provincial authorities; and
- Tourism safety and security – establish local tourism safety programmes in collaboration with local business, SAPS and communities.

### **17.5 Tourism Infrastructure Investment Framework, 1999**

The Tourism Infrastructure Investment Framework (TIIF), published by DEAT in association with the DBSA in 1999, was the final outcome of a more extensive process to review infrastructure in support of international and domestic tourism development. The process commenced with the defining of a methodology to target the development of tourism infrastructure into areas in South Africa with considerable development needs and where significant tourism potential existed. This involved the development of criteria to be used in the identification and prioritisation of Tourism Development Areas (TDA's), followed by the definition of Priority Areas for Tourism Infrastructure Investment (PATII's), identification of linkages between these areas and the development of a Tourism Spatial Framework for South Africa, which in turn provided the context for the development of the TIIF

A tourism infrastructure assessment model was applied to the PATIIs in order to identify tourism infrastructure provision requirements in terms of transport infrastructure, delivery infrastructure and locational infrastructure.

Through an analysis of the tourism space economy and how tourists move through the landscape, the tourism spatial framework allowed further investigation of the PATIIs resulting in recommendations regarding gateways and entry points, staging posts, distribution points, routes and destinations in relation to the PATIIs.

## **17.6 National Responsible Tourism Guidelines for South Africa, 2002**

Based on key performance indicators, responsible tourism as outlined in the National White Paper on the Development and Promotion of Tourism in South Africa seeks to achieve tourism growth that is balanced and supported by sound environmental, social and economic principles. Pursuant to the ideals of the White Paper, continued work by the then DEAT around the concept of responsible tourism has culminated in the development Responsible Tourism Guidelines for South Africa in 2002. The following principles were considered during this study:

### **17.6.1 Economic guidelines**

- Assessing economic impacts prior to tourism development;
- Maximising local economic benefits through reducing leakages and increasing
- Linkages;
- Ensure community involvement in tourism that translates into direct benefits;
- Enhancing local marketing and product development; and
- Promoting equitable tourism business.

### **17.6.2 Social guidelines**

- Ensure community involvement in planning and decision making;
- Assessing social impacts prior to tourism development;
- Maintain, encourage and respect social and cultural diversity; and
- Be sensitive to host cultures.

### **17.6.3 Environmental guidelines**

- Assessing environmental impacts prior to tourism development;
- Ensure sustainable use of natural resources; and
- Maintain, encourage and respect biodiversity.

The Responsible Tourism Guidelines are fully applicable to this study because they directly promote tourism development that minimizes ecological impacts, benefits local communities and reduces poverty. For tourism development in the Western and Northern Cape District to be successful, consideration must be given to the National Responsible Tourism Guidelines. The municipality is environmental sensitive and is home to many local communities. Responsible tourism development is therefore a priority to ensure the long term sustainability of the municipality as a tourism destination and alignment must be achieved at a provincial and district level. In addition it is important that economic development plans, social

development plans and environmental management plans on district and local level be consulted to achieve optimal alignment.

### **17.7 Development of the Tourism Bee Charter Scorecard**

South Africa is one of the few countries worldwide that are considered to be transitional economies – i.e. transition from apartheid-based governance to democracy governance. In line with this principle, any consideration for tourism development or aspect such as impact on the sector should also consider the principles of broad based economic liberalisation that are at the centre of the modern South Africa society. The tourism sector, like any other economic sector has developed measures to ensure that there is broad based participation and beneficiation in the sector. As such, the present impact assessment study also considered the broad base aspect of the sector that may be affected or impacted by any change in the local tourism sector. These aspects can best be understood under the Tourism Charter and BEE Scorecard which was launched by the Minister of Environmental Affairs and Tourism in July 2004. Coinciding with the launch of the scorecard was the appointment of a Steering Committee responsible for accomplishing the following:

- The development of a BEE scorecard for the tourism sector in order to advance the objectives of the Broad Based Black Economic Empowerment Act No 53 of 2003;
- Develop and promote the BEE process in the tourism industry;
- Be committed to the development of the BEE Scorecard;
- Drive the scorecard development process, particularly in terms of promotion, deliverables and the solicitation of input; Communicate the process and broader principles of the scorecard;
- Facilitate access to research, input and information in the tourism industry; and
- Facilitate partnerships between the organs of state and the private sector that will advance the objectives of the scorecard.

The Tourism Charter and BEE scorecard is a deliberate attempt to transform the tourism industry. It recognizes the Tourism Sector as being a people driven sector in which individuals provide services and interactions which determine the quality of tourism services and products. The Scorecard in the first 5 years since its inception is weighted towards the human factors i.e. strategic representation, employment equity, skills development and enterprise development. These four factors collectively account for 62% of the scorecard's 100% weighting for the period ending 31 December 2009. The BEE Tourism Scorecard targets an overall level of direct and indirect ownership by black people of 21% for the period ending 31 December 2009 and 35% for the period ending 31 December 2014. It also targets attracting an overall level of participation by black people at supervisory and junior skilled staff level of 45% for the period ending 31 December 2009 and 65% for the period ending 31 December 2014.

### **17.8 South African Tourism: Tourism Growth Strategy, 2001**

Any estimation of any form of impact on tourism and related development should also consider the planned and growth strategy initiatives for the sector. The proposed powerline development is considered as having potential to negatively or positively impact on the sector in the receiving environment. To understand the potential impact and their effect on growth, this study also considered the National Growth Strategy. As the National destination-marketing organisation, South African Tourism (SAT) developed the Tourism Growth Strategy to inform the strategic deployment of its resources in order to facilitate tourism growth in South Africa. The strategy forced SAT to revisit its approach to marketing tourism and agreed on the following conclusions outlined below:

- More focused effort and resources— despite overall increases in funding in global terms the SAT marketing budget was small particularly in light of the weakness of the rand and currency. SAT had to focus its efforts and resources on those countries and customer segments which were most valuable to SA;
- Rebalance the portfolio – arrivals to South Africa were too dependent on a few markets. There was a requirement to lessen dependence on volatile markets and at the same time increase share in high – value markets;
- A consumer orientated marketing approach – moving towards delivering what the consumer wants; and
- Alignment of the tourism sector - the Tourism plan and the industry needs to upgrade products and services in alignment with the marketing message.

### **17.9 South African Domestic Tourism Growth Strategy, 2003/2004**

The Domestic Tourism Growth Strategy (DTGS) sets out a plan for SAT and DEAT together with the nine Provincial Tourism authorities to grow the domestic tourism market: in terms of volume, value and distribution.

### **17.10 The Tourism, Hospitality, and Sport Education and Training Authority (Theta)**

THETA is the Sector Education and Training Authority for the tourism, hospitality and sport economic sectors in South Africa. The SETA's primary function is to raise the level of skills in the aforementioned sectors. In terms of its constitution THETA aims to:

- Develop worker skills;
- Increase investment in training and education in identified sectors;
- Encourage employers to train and educate existing staff;
- Improve employment opportunities for disadvantaged individuals;

- Ensure the quality of training undertaken in the various sectors; Assist employers in procuring reliable and skilled employees; and
- Assist work seekers in acquiring suitable employment.

In order to deliver on these objectives THETA developed the National Skills Development Strategy and Sector Skills Plan, which outlines the way forward in terms of skills development in South Africa.

## **17.11 Tourism And Environmental Management**

Any consideration of tourism would not be complete without considering the relationship between the sector, its resources and the environment. Tourism sector draws much from the environmental resources, which are themselves managed by a set of interlinking legislative and policy frameworks. This study is part of a broader Environmental Impact Assessment study, which derives from environmental management principles and legislations.

### **17.11.1 The National Environmental Management Act (Act No 107 Of 1998)**

The aim of the act is to encourage, promote and create parameters for legal enforcement for environmental protection, management and compliance. Chapter 1 of the National Environmental Management Act (NEMA) defines the National Environmental Management Principles that apply throughout the Republic and stresses the fact that “environmental management must place people and their needs at the forefront and serve their physical, psychological, developmental, cultural and social interests equitably”. It also provides a framework for sustainable development that implies “meeting the needs of the present generation without compromising the needs of the future generations”. The proposed Powerline development qualifies, as a listed development that has the potential to affect the environment and as such as EIA study is required.

### **17.11.2 National Environmental Management: Biodiversity Bill Of 2003**

Eco tourism and other tourism offerings are heavily dependent on the bioregional resources. Western and Northern Cape region through which the powerline will traverse is heavily tipped in biophysical, safari and eco resources based tourism. It is fitting that this study considers the applicable policy and legislative framework applicable hereon. The Bill provides for the management and conservation of South Africa’s biodiversity within the framework of the National Environmental Act of 1998.

In addition to establishing The South African National Biodiversity Institute and describing its functions and operations, the Bill also addresses biodiversity planning and monitoring through making provision for:

- The development and implementation of a national biodiversity framework;
- The identification of bio municipalities and development of related bioregional plans; and

- The development of biodiversity management plans for ecosystems, indigenous species and migratory species.

The Bill further requires the development of monitoring mechanisms and indicators to determine the conservation status of various South African biodiversity components and any negative and positive trends that may impact upon it.

### **17.11.3 National Environment Conservation Act (Act 73 Of 1989)**

The Environment Conservation Act (ECA) was intended to be an overarching national act to regulate all aspects related to the effective protection and controlled utilization of the environment. The National Environmental Management Act (Act 107 of 1998) has recently repealed most of the Environment Conservation Act. However, Sections 21 and 26 of the Environment Conservation Act and their associated regulations, which deal with the

Environmental Impact Assessment process and which control certain activities that could have an impact on the environment, remain relevant