INFORMATION MEMORANDUM

Information Memorandum issued by South African National Parks in respect of opportunities offered in the Kruger National Park
IMPORTANT NOTICE

This Information Memorandum (Memorandum) has been produced by South African National Parks (SANParks), in connection with the tendering for opportunities in the Kruger National Park.

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This Information Memorandum has been provided to the recipient to assist in making its own appraisal of the PPP opportunities presented herein and in deciding whether to submit a proposal in connection with the opportunities. However, this Information Memorandum is not intended to serve as the basis for an investment decision on the opportunities, and each recipient is expected to make such independent investigation and to obtain such independent advice as he or she may deem necessary for a decision.

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November 2018
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1. **INTRODUCTION**

This Information Memorandum ("Memorandum") is issued by South African National Parks (SANParks) in accordance with the guidelines for Public Private Partnerships ("PPPs") contained in National Treasury's Tourism PPP Toolkit, and in compliance with Treasury Regulation 16 issued in terms of the Public Finance Management Act 1999.

2. **SANPARKS’ VISION, MISSION AND KEY STRATEGIC OBJECTIVES**

2.1 **SANPARKS’ VISION AND MISSION**

South African National Parks (SANParks) was established as a parastatal through an Act of Parliament in 1927. As per the Public Finance Management Act, Act 1 of 1999 (as amended by Act 29 of 1999), SANParks is a Schedule 3(a) “public entity” that functions under the ambit of the NEMA: Protected Areas Act, 2003 (Act 57 of 2003) read concurrently with the Biodiversity Act of 2004 and the Protected Areas Act. The core mandate of SANParks is the conservation and management of biodiversity and associated cultural heritage through a system of National Parks. SANParks is also involved in the promotion and management of nature-based tourism, and delivers both conservation management and tourism services through an authentic people centred approach on all its programmes.

The organisation’s operations are totally guided by its vision statement and mission statement. As a public entity, the organisation is committed to act in pursuance of transformation of South Africa’s society in support of entrenching South Africa’s democracy. In this regard the organisation has adopted a transformation mission to guide its efforts accordingly.

**VISION** – A sustainable National Park System **connecting society**.

**MISSION** - To **develop, expand, manage and promote a system of sustainable national parks** that represents biodiversity and heritage assets, through innovation and best practice for the just and equitable benefit of current and future generations.
2.2 SANPARKS’ KEY STRATEGIC OBJECTIVES

SANParks’ business operations are founded on three important core pillars:

2.2.1 Conservation

The primary mandate of the organisation is the conservation of South Africa’s biodiversity, landscapes and associated heritage assets through a system of National Parks.

2.2.2 Nature-based tourism

The organisation has a significant role in the promotion of South Africa’s nature-based tourism, or ecotourism business targeted at both international and domestic tourism markets. The eco-tourism pillar of the business architecture provides for the organisation’s self-generated revenues from commercial operations that is necessary to supplement government funding of conservation management.

A significant element of the ecotourism pillar is the Strategic Plan for Commercialisation (which through the implementation of Public Private Partnerships) has as its objective reducing the cost of delivery, improving service levels by focusing on core business and leveraging private capital and expertise as well as the objective of expansion of tourism products and the generation of additional revenue for the funding of conservation and constituency building.

2.2.3 Constituency building towards a people-centred conservation and tourism mandate

SANParks is required to build constituencies at international, national and local levels, in support of the conservation of the natural and cultural heritage of South Africa. It has to ensure that a broad base of South Africans participate and get involved in biodiversity initiatives, and further that all its operations have a synergistic existence with neighbouring or surrounding communities for their socio-economic benefit.

The core mandate of the organisation derives from its biodiversity conservation role, thus the conservation pillar is regarded as the basis upon which the other two sub-core pillars’ programmes and activities are directed.
In addition to the core and sub-core business pillars that provide SANParks with a level of uniqueness, the organisation has generic support functions of Finance, Human Resources, Corporate Communications, Corporate Support Services (including Information and Communications Technology), and Legal Services. The operational component of SANParks is delivered through the current existing National Parks – these being organised under two divisions namely, Kruger National Park and the Parks Division (which entails the remainder of the National Parks).

3. ARTICULATION OF SANPARKS’ COMMERCIALISATION POLICY, OBJECTIVES AND STRATEGY

3.1 THE MOTIVATION FOR COMMERCIALISATION

“Global conventions and programmes alone are not enough to ensure the continued existence of, and sufficient funding for, protected areas. In times of fiscal austerity and tightening government budgets – especially in developing countries which are home to much of the world’s biodiversity – traditional funding sources are increasingly under threat. Innovative alternatives to these traditional sources are needed in order to secure the long term viability of protected areas.” (IUCN, 1998)

In order to encourage greater efficiency in the delivery of public services, the Cabinet in April 1997 approved the establishment of an interdepartmental task team chaired by the Department of Finance, to explore how public private partnerships ("PPPs") could improve infrastructure and service delivery efficiency, and make more efficient use of under-utilised state assets. The key objectives of this programme were to develop a package of cross-sectoral and inter-Institutional policies and legislative and regulatory reform.

In September 1998, the Department of Environmental Affairs and Tourism articulated the need for SANParks to prepare for a lesser dependence on state funding, which would increasingly be aimed at funding the essential conservation requirements. This formed the basis of the Commercialisation Strategy adopted by SANParks in 2000 with its foundation in the economic theory which defines the State’s responsibility as one of performing a regulatory function and intervening in the market-place only where there is market failure. The objective was to reduce the dependence on state funding and improve existing operational efficiencies. This does not imply that SANParks has to be independent of the
State but rather that the collective funding sources (i.e. state funding, private donations, NGO and international donations, SANParks' tourism activities and commercialisation) must be able to “sustain” the total business of SANParks. Sustainable tourism development depends on a partnership and balance between the social, technological, economical, the environment and political values and benefits. Hence, should one source of funding be threatened, SANParks must be able to absorb such withdrawal without compromising its sustainability.

The implementation of the Commercialisation Strategy 2000, resulted in the awarding of 11 (eleven) concession sites to private operators, seven of which are in Kruger National Park, two in Addo Elephant National Park, and one in Cape Peninsula National Park.

In addition to the concessions, the Commercialisation Strategy 2000 also resulted in the awarding of 21 shops and 17 restaurants across all national parks to private operators. Facilities were upgraded by the operators and SANParks receives a PPP Fee from these operators.

3.2 THE STRATEGIC PLAN FOR COMMERCIALISATION 2006

Following the implementation of the Commercialisation Strategy 2000, there have been significant developments in SANParks’ approach to PPP initiatives. SANParks accordingly developed the Strategic Plan for Commercialisation 2006 to accommodate and benefit from:

(i) The experience and specialist skills acquired;
(ii) The lessons learnt from implementation and management of PPPs;
(iii) Legislative requirements; and
(iv) The extended scope of projects identified to enable SANParks to improve its infrastructure towards 2010 and beyond, generate revenues, promote BEE and create employment.

The objective of the strategy is to ensure that SANParks has the fundamentals including capacity in place for managing existing, and for entering into new PPPs successfully. In addition, SANParks has a responsibility towards creating tourism infrastructure on a
longer term as compared to a tourism organisation run by a private company. Such infrastructure will enable South Africa to compete with global tourism destinations like Brazil, Thailand etc. Commercialisation through Public Private Partnerships provides SANParks the opportunity to achieve this goal.

High-level commercialisation objectives for SANParks include any or all of the following:

- Revenue Generation;
- Loss minimisation or savings on existing operations;
- Optimal use of under-performing assets;
- Job creation;
- Broad based Black Economic Empowerment;
- Infrastructure upgrades;
- Upgrade/development of historical and/or cultural sites;
- Tourism promotion; and
- Further biodiversity protection and conservation.

3.3 THE STRATEGIC PLAN FOR COMMERCIALISATION 2012

In 2012 SANParks revised the Strategic Plan for Commercialisation. The following outlines the major changes:

- The SPfC 2013 – 2018 has been amended to ensure alignment with the SANParks Responsible Tourism Strategy 2022 as well as the National Tourism Sector Strategy, the National Minimum Standard for Responsible Tourism (SANS1162), the SANParks Responsible Tourism Policy, the SANParks Product Development Protocol, the SANParks Management Plans and the SANParks Responsible Tourism Product Framework and their respective objectives.

- The SPIC was furthermore updated to reflect an updated checklist for all commercial opportunities identified thereby re-introducing PPPs as a Key Strategic Objective of SANParks for the period 2013 to 2018. The initial checklist for identified projects also fell within the structure of the SANParks Responsible Tourism Product Framework.
Finally, the SPfC 2013 – 2018 addressed the capacity requirements of the Business Development Unit to ensure the effective delivery of the SANParks Responsible Tourism Strategy 2022. The Business Development Unit is restructured to ensure that all skills and expertise are cross-pollinated to all product development in SANParks. The Business Development Unit will be responsible not only for the PPP Projects but also Tourism Planning and Product Development as well as Special Projects. While the focus of the Business Development Unit will coordinate and develop their larger role, the scope of the SPfC is limited to the commercialization as defined by the PFMA Regulation 16 that deals with Public Private Partnerships only and the capacity requirements in ensuring the delivery of such.

4. A DESCRIPTION OF THE PPP OPPORTUNITY

4.1 INTRODUCTION

SANParks, as part of its Strategic Plan for Commercialisation, identified the PPP opportunity for the Phabeni Education Centre in the Kruger National Park.

It is intended that by SANParks entering into the PPP with a Private Party, SANParks may be able to generate additional revenue through PPP fees paid to SANParks by the Private Party and also allow for an avenue for environmental education for kids and training to happen with external people as well as SANParks’ employees, while enabling SANParks to focus on its core activity of conservation. It is intended that the project will be developed by the Private Party in compliance with strict environmental standards maintained by SANParks. In keeping with SANParks’ objectives, particular attention will be paid to the implementation of broad-based Black Economic Empowerment (“BEE”), particularly those from local communities adjacent to the Parks. In addition, private operators will have to respect existing SANParks regulations regarding protection of the environment. In this regard, SANParks will require that Interested Parties confirm their willingness to promote BEE by entering into an agreement with a local community trust partner.

4.2 VALUE FOR MONEY OBJECTIVES
The value-for-money objectives for the project have to be aligned with SANParks' strategic objectives included in the Strategic Plan for Commercialisation. Setting these objectives at the inception phase are vital as they provide the benchmarks for the feasibility and procurement phases. During the management of the PPP agreement, they are used to measure the success of the project.

The Value-for-Money Objectives for the project are:

- Revenue generation for SANParks;
- BEE, job creation and community development; and
- Conservation Management through skilling a variety of people.

### 4.3 MINIMUM DEVELOPMENT SPECIFICATIONS

The Private Party Operator will be expected to adhere to the Minimum Development Specifications as follows:

<table>
<thead>
<tr>
<th>Minimum Development Specifications</th>
<th>80 hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fencing</td>
<td>No prescribed minimum but could include the following:</td>
</tr>
<tr>
<td></td>
<td>• Hiking trails</td>
</tr>
<tr>
<td></td>
<td>• Trail running course</td>
</tr>
<tr>
<td></td>
<td>• Seqway path and product</td>
</tr>
<tr>
<td></td>
<td>• Acrobranch course</td>
</tr>
<tr>
<td></td>
<td>• Astronomy</td>
</tr>
<tr>
<td></td>
<td>• Other activities within the fenced area</td>
</tr>
<tr>
<td>Addition of activities</td>
<td>• Tented camp (for</td>
</tr>
</tbody>
</table>
4.4 SITE

The Phabeni Education Centre is located just south of the Phabeni gate next to the railway line within the borders of the Kruger National Park. The following map outlines the location (indicated by the black arrow):

Infrastructure has already been built on site at the Phabeni Education Centre. The following outlines the facilities on site:

- Four dormitories that can sleep approximately 15 each;
- On suite bedrooms (two in total) for senior staff accompanying the groups;
- Ablution facilities;
- Kitchen facilities (fully equipped with walk in freezers and fridges and stoves);
- Boma area;
- Conference room; and
- On suite staff units (x 3) inclusive of communal kitchen area (with kitchen area equipped with gas stoves).

The following plans outlines this existing infrastructure:

In addition to the existing buildings and exclusive pristine area of approximately 1.6 km x 0.5 km (80 hectares) is available to conduct in-bush training and activities but will require fencing for optimal use. The following map shows the bigger area – the above infrastructure is at the most northern point of the precinct as depicted below:
Bidders, in their Bid Submission, will include a detailed development and design plan for the fenced area. However, Bidders should be aware, that should they win the bid, their detailed proposals will still be subject to a full Environmental Impact Assessment ("EIA") of proposed developments at their own cost.

EIAs must be prepared for certain prescribed activities, or activities that might affect designated areas such as a National Park. All EIAs must be prepared by an independent consultant. Given the financial cost and time required, EIAs will only be undertaken by the successful bidder upon signature of the PPP Agreement. The environmental clearance given by the Evaluation Committee at the time of the bid does not absolve the winning bidder from the need to go through this process, and offers no guarantee that EIA clearance will be given. Any changes to the procedures or design that are required by the EIA process will be at the cost of the winning bidder – there will be no recourse to SANParks.

4.5 RESPONSIBLE TOURISM STANDARDS
4.5.1 Responsible Tourism

Responsible Tourism is a tourism management strategy embracing planning, management, product development and marketing to bring about positive economic, social, cultural and environmental impacts. Responsible Tourism provides for the following:

- generates economic benefits for local people and enhances the well-being of host communities;
- improves working conditions and access to the industry;
- involves local people in decisions that affect their lives and life chances;
- makes positive contributions to the conservation of natural and cultural heritage to the maintenance of the world's diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people and a greater understanding of local cultural, social and environmental issues;
- minimises negative economic, environmental and social impacts; and
- is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.

4.5.2 National Responsible Tourism Guidelines

In 2002, the Department of Environmental Affairs and Tourism (“DEAT”) published National Responsible Tourism Guidelines reflecting South Africa’s vision to manage tourism in a way that contributes to the quality of life of all South Africans. The Guidelines aim to set benchmark standards for accommodation and transport operators, tourism associations and custodians of our cultural and natural heritage. The objective is to ensure that our tourism sector keeps pace with international trends towards responsible business practice – and gains market advantage in doing so. In 2003, DEAT published the Responsible Tourism Handbook which took it one step further by giving practical examples of how tourism operators can improve their economic, social and environmental practices.
Various institutions/organisations offer environmental management consulting and accreditation services to all business sectors interested in implementing environmentally friendly business practices and hence offer Environmental Rating Programmes. Such eco-labelling schemes include:

- ISO 14001
- Green Globe
- Blue Flag
- NEAP
- Heritage
- Ecoquest
- Fair Trade in Tourism

It should be a target of the centre to be accredited by one or more of these (or similar organisations).

4.5.3 National Responsible Tourism Standard & Accreditation System

The National Department has recently commenced with the development of a National Standard for Responsible Tourism, a national accreditation scheme that tourism operators will be accredited by. The Private Party Hotel Operator shall be obliged to comply with the accreditation in terms of the National Standard for Responsible Tourism, once completed. Such accreditation will be compulsory and should be obtained within 12 months from Operation Commencement Date and renewed thereafter on an annual basis.

4.5.4 SANParks Responsible Tourism Strategy

South African National Parks has drafted a Responsible Tourism Strategy which could be found on the SANParks Website under the link “About Us”. Please refer to this document for insight into SANParks’ responsible strategy till 2022.
The purpose of the responsible tourism strategy and implementation plan is to consistently integrate the principles of the national responsible tourism guidelines (DEAT, 2002) into South African National Parks operations.

This strategy and plan will help to reduce fragmentation of responsible tourism activities by SANParks and its business partners, by providing a framework for a coordinated approach. It will also reduce the disparity between levels of responsible tourism practiced, monitored and reported between SANParks tourism operations and concessionaires (who are contractually required to practice responsible tourism). Implementation of strategy and plan will help address potential future problems, such as mitigation and adaptation to climate change. The strategy is also a response to the increased market demand for responsible holidays from tourists, and will enable SANParks to put into place the conditions that are required to position the national park systems as responsible destinations.

The responsible tourism strategy covers the following:

- The alignment of the principles of Responsible Tourism with existing corporate values and actions, with amendments to policies and procedures to accommodate Responsible Tourism values and indicators
- Recommended additions to the SANParks scorecard to include Responsible Tourism indicators
- Processes required to embed awareness of and decision-making and actions aligned with Responsible Tourism throughout the organization.

4.5.4.1 Objectives of the Responsible Tourism Strategy

The objectives of the responsible tourism strategy and implementation plan aim to provide a basis for decision making, and guidance for divisions to develop action plans that comply with this policy. The objectives are:

- Align SANParks operations with the national policy on responsible tourism;
- Enhance responsible tourism awareness and management skills
among protected area managers and tourism officers and business partners within SANParks;

- Enhance responsible tourism awareness and skills among SANParks’ external stakeholders, including communities, and suppliers;

- Integrate responsible tourism principles and actions into management plans for each national park in South Africa;

- Establish a practical framework for monitoring, evaluation and reporting in national park destinations; and

- Integrate responsible tourism into the performance management frameworks of the organisation, individual parks and individual staff members.

4.5.4.2 Guiding Principles of the Responsible Tourism Strategy

The guiding principles of the responsible tourism strategy and implementation plan are that they are:

- based on the national responsible tourism guidelines (DEAT, 2002);

- aligned with the national Minimum Standards for Responsible Tourism;

- aligned with SANParks Corporate Strategic Business Plan, and cognisant of the Conservation Development Framework and Park Management Plans;

- easy to understand and implement;

- adaptive and flexible;

- monitored at both a corporate and operational level;

- developed and implemented through a participatory process by a broad
range of SANParks stakeholders, including business partners;

- initially focus on quick wins, that can be used to promote the responsible tourism agenda throughout the organization;
- address initiatives that facilitate the achievement of SANParks core objectives (e.g. better relations with local communities, reducing poaching, helping park expansion)

4.5.5 Private Party Requirements

The Private Party Operator will be required to adhere to all the applicable Responsible Tourism Standards as stipulated as well as the “greening” principles and criteria derived from the existing standards set by SANParks for the Concessions as reflected in the SANParks Management Plan Policy Framework, the KNP Management Plans, the Concession Operations Manual or any other reasonable requirements set by SANParks.

5. DEVELOPMENT SITE SPECIFIC CONDITIONS

5.1 LOCATION

Just south of the Phabeni gate within the perimeter of the park:

5.2 DESCRIPTION
An education centre designed for this purpose and to be used for this purpose – consisting of dormitories where the trainees will sleep, a kitchen area where the food will be prepared, staff housing, a conference facility and boma area. In addition, an area of approximately 80 hectares can be fenced off to allow for various activities required to compliment the education and training presented.

5.3 INFRASTRUCTURE PRESENT

The following infrastructure is present:

- Four dormitories that can sleep approximately 15 each;
- On suite bedrooms (two in total) for senior staff accompanying the groups;
- Ablution facilities;
- Kitchen facilities (fully equipped with walk in freezers and fridges);
- Boma area;
- Conference room; and
- On suite staff units (x 3) inclusive of communal kitchen area (fully equipped).

The following plans outlines this existing infrastructure:
5.4 ROADS AND TRACKS

A gravel road links the tarred S1 with the education centre. SANParks will continue to maintain this road to acceptable standard in line with the road classification.

5.5 ACCESS

Access will be granted only via the road linking up with the S1.

5.6 SUPPORT INFRASTRUCTURE

5.6.1 Water

There is potable water on site. Water use will be metered and billed on a consumption basis in line with the KNP tariff document.

5.6.2 Electricity

There is Eskom electricity available on the site. Electricity use will be metered and billed on a consumption basis in line with the KNP tariff document. In addition a 5 KVA hybrid system with back-up battery is included as part of the infrastructure. The operator will be allowed to increase the capacity of this grid with SANParks’ (KNP Technical Services) approval.

5.6.3 Waste

Solid waste should be recycled on site by the Private party and transported to an approved landfill site outside the Kruger National Park and approved re-cycling depots.

5.6.4 Communications

Cellular signal of low to medium strength is available at the facility.

5.7 GUEST ACTIVITIES

Various types of environmental education and training courses should be conducted at the site with environmental education being key. The objective of this centre is to skill
people on conservation and courses of various lengths and durations can be presented. The attendees will be diverse and could but is not limited to include people that require a formal education / training to allow them to apply for positions in the conservation sphere, people that show an interest in conservation and are looking for formal training courses to enhance their skills, skilling of local community members in conservation principles and / or training of school groups as part of the curriculum or informal training.

A minimum of 109 days should be allocated for environmental education and could include representatives from the SANParks People and Conservation (P&C) Department tasked to perform this role. In this instance the operator will work hand-in-hand with SANParks to present a superior environmental education curriculum and product.

6. **BENCHMARK PRICING AND CONTROL**

During the contract period SANParks will take steps to ensure that the private operators do not abuse the monopoly status of the Parks.

In order for a PPP to be successful it is imperative that:

- The Public entity improve service at the state asset and receive a fair income for services rendered;
- The Private Party receive a fair return on investment;
- Employees benefits by being employed by a company that has superior skills in the running of a specific operation, i.e. in this case an environmental education and training company geared to present a variety of courses. Together with the privilege to work for such a company comes career opportunities;
- The customer / client to the park should see the benefits and share in the fact that the operations were outsourced. In light of that the customer should not pay a penalty (through high prices) but should be afforded / offered a value for money product therefore these operations will not be permitted to charge prices which are significantly higher than charged outside the Parks. In addition, SANParks will have the right to conduct periodic checks and otherwise monitor the pricing offered by the
operators. Failure to charge market-related prices could result in termination of contract.

6.1 **MONITORING - ANALYSIS DASHBOARD:**

SANParks currently monitors customer satisfaction through a system whereby the customer is requested to capture ratings based on their experience / visit to the parks. The following areas are covered as part of this process:

- Making your booking
- Admission through Park Gate
- Reception at camp
- Caravan, camping and accommodation
- Shopping experience
- Dining experience
- Game activities
- Overall experience

More areas could be covered in the system as and when the need arise hence SANParks could decide to include the specific concession / operation into the customer satisfaction system i.e. how well was your course at the Phabeni Education Centre presented, how was the food, professionalism of the staff, activities, course material, etc. The aim is to score at least 75% for each of the areas. The areas could be increased as and when new products are implemented.

7. **EMPLOYEES**

Currently three staff members are employed at the Phabeni Education Centre and will in all likeliness transfer through section 197 to the operator. Cost to company information could be obtained directly from the project officer.
In addition to these three people the successful bidder will be required to staff the centre. It should be noted that the staffing should complement the BEE scorecard and should focus specifically on people from the local communities and/or from the group of successful land claimants.

The following outlines some of the benefits that the staff might enjoy:

- Salary;
- Pension Fund contributions;
- Transport to town / medical facilities;
- Staff housing;
- Uniform allowance;
- Leave allocation including sick leave, compassionate leave, maternity leave, study leave, etc.
8. **MARKET OVERVIEW**

8.1 **SOUTH AFRICAN NATIONAL PARK TOURISM**

SANParks accounts for the largest single segment of the South African tourism industry. With over 5,200 beds and 1,000 campsites under its control, SANParks is by far the largest single supplier of tourist accommodation in the country accounting for 24% of all nature based tourism in South Africa and receives 6.87 million visitors to the parks per year (as per 2016/2017 figures).

The following table gives an overview of visitors per park:

<table>
<thead>
<tr>
<th>PARK</th>
<th>GUESTS TO PARK April 2016 - March 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addo</td>
<td>265585</td>
</tr>
<tr>
<td>Augrabies</td>
<td>68131</td>
</tr>
<tr>
<td>GRNP - Tsitsikamma</td>
<td>336562</td>
</tr>
<tr>
<td>Karoo</td>
<td>39678</td>
</tr>
<tr>
<td>Kgalagadi</td>
<td>48221</td>
</tr>
<tr>
<td>Kruger</td>
<td>1817724</td>
</tr>
<tr>
<td>Mountain Zebra</td>
<td>27965</td>
</tr>
<tr>
<td>Table Mountain</td>
<td>3382101</td>
</tr>
<tr>
<td>Other Parks</td>
<td>886332</td>
</tr>
<tr>
<td><strong>Total 2016/17</strong></td>
<td><strong>6872299</strong></td>
</tr>
</tbody>
</table>

From 2015/2016 to 2016/2017 there has been a 16.78% increase in visitation to National Parks.
The Kruger National Park accounts for about 70% of the total bed-nights sold in SANParks and 26% of total guests to Parks. Table Mountain is the most visited park and accounts for about 49% of all visitors to National Parks.
8.2 PARK SPECIFIC INFORMATION

8.2.1 Kruger National Park

The world-renowned Kruger National Park offers a wildlife experience that ranks with the best in Africa. Established in 1898 to protect the wildlife of the South African Lowveld, this National Park of nearly 2 million hectares, SANParks - Kruger National Park is unrivalled in the diversity of its life forms and a world leader in advanced environmental management techniques and policies. Truly the flagship of the South African National Parks, Kruger is home to an impressive number of species: 336 trees, 49 fish, 34 amphibians, 114 reptiles, 507 birds and 147 mammals. Man's interaction with the Lowveld environment over many centuries - from bushman rock paintings to majestic archaeological sites like Masorini and Thulamela - is very evident in the Kruger National Park. These treasures represent the cultures, persons and events that played a role in the history of the Kruger National Park and are conserved along with the park's natural assets.

GUEST DEMOGRAPHICS YEAR ENDED 31 MARCH 2017

<table>
<thead>
<tr>
<th>TOTAL GUESTS TO PARK (GUESTS THROUGH GATES)</th>
<th>1 817 724</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPOSITION</td>
<td></td>
</tr>
<tr>
<td>RESIDENCE STATUS</td>
<td>NUMBER</td>
</tr>
<tr>
<td>SA RESIDENT</td>
<td>1 295 579</td>
</tr>
<tr>
<td>SADC NATIONAL</td>
<td>33 325</td>
</tr>
<tr>
<td>INTERNATIONAL (EXC SADC)</td>
<td>488 820</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1 817 724</td>
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<tr>
<td>RACE PROFILE / DAY VS OVERNIGHT</td>
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<td>GROUPING</td>
<td>NUMBER</td>
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<tr>
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<td>427 362</td>
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<tr>
<td></td>
<td>OVERNIGHT</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------</td>
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<tr>
<td></td>
<td>29,742</td>
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<tr>
<td>WHITE</td>
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<tr>
<td></td>
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<td>54.86%</td>
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<td>19.98%</td>
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<td>74.85%</td>
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<tr>
<td>TOTAL OVERNIGHT</td>
<td>393,088</td>
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<td>TOTAL DAY</td>
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<td>GRAND TOTAL</td>
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<th>INTERNATIONAL GUESTS (NON SA RESIDENTS)</th>
<th>NUMBER</th>
<th>% of total international</th>
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<tbody>
<tr>
<td>GERMANY</td>
<td>138,905</td>
<td>26.6%</td>
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<tr>
<td>FRANCE</td>
<td>66,057</td>
<td>12.65%</td>
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<tr>
<td>UNITED KINGDOM</td>
<td>55,812</td>
<td>10.69%</td>
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<tr>
<td>UNITED STATES</td>
<td>42,330</td>
<td>8.11%</td>
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<tr>
<td>HOLLAND</td>
<td>35,229</td>
<td>6.75%</td>
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<tr>
<td>OTHER</td>
<td>183,812</td>
<td>35.2%</td>
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<tr>
<td>TOTAL INTERNATIONAL</td>
<td>522,145</td>
<td>100.00%</td>
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<td>NUMBER 3</td>
<td>UNITED KINGDOM</td>
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<tr>
<td></td>
<td>NUMBER 4</td>
<td>UNITED STATES</td>
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<tr>
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<td>NUMBER 5</td>
<td>HOLLAND</td>
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9. ANNEXURE A – RESPONSIBLE TOURISM IN SANPARKS – JOURNEY TO 2022
10. ANNEXURE B – FACILITY PHOTOS

Outside areas including boma area:
Dormitories including ablution facilities:
Kitchen area:
Staff housing: