

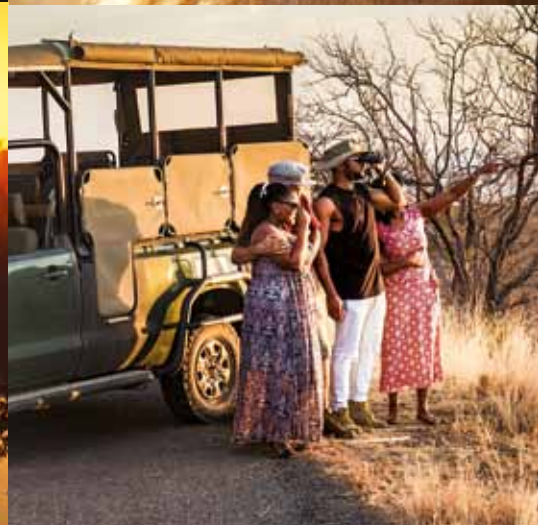


South African
NATIONAL PARKS



TOURISM INVESTMENT OPPORTUNITIES

A SUSTAINABLE NATIONAL PARK SYSTEM CONNECTING TO SOCIETY



FOREWORD



MINISTER OF ENVIRONMENTAL AFFAIRS

The hosting of this first Tourism Investment Summit by the South African National Parks – a Department of Environmental Affairs public entity – is a clear demonstration of the government's commitment to turning radical socio-economic transformation into real action.

It is well known that the development of the tourism sector is one of government's key priorities as encapsulated in the National Development Plan (NDP). The NDP calls for emphasis to be placed on increasing the number of tourists entering South Africa, making doing business with South Africa easier to attract more business travellers, as well as promoting the Southern African region as an international tourism destination by emphasising the broader biodiversity of the region as a tourism product.

We continue to focus our efforts on harnessing the potential of this sector, not only for our country's GDP growth, but also for skills development and job creation in the tourism sector. We are committed to ensuring that there is a balance between economic growth and environmental sustainability.

In 2016, over 10 million tourist arrivals were recorded in South Africa, a 13% increase from 2015. The sector accounted for 4.5% of total employment in 2015. There are over 700 000 jobs in the tourism sector, and we can improve these numbers only if private and public interest support each other.

As part of the overall transformation of the tourism economy, SANParks is gearing its marketing and product development towards bringing in a new customer base for national parks. While retaining the traditional client base of the past, SANParks is diversifying its product base and re-targeting its marketing thrust to ensure that it remains competitive into the future. This includes the construction of conference facilities in the Kruger National Park, and planned construction of a safari lodge in the park.

I am confident that SANParks will, through its work, ensure that it remains at the cutting edge of conservation, tourism and socio-economic development.

Our national parks are not only about the conservation of fauna and flora. They are also important catalysts for economic development. As government, we will continue to look for partners in the establishment of responsible new products for sustainable development and tourism growth while at the same time, and more importantly, ensuring that our fauna and flora in our national parks are conserved.

I wish you successful deliberations and we hope that public and private initiatives will find a space for sustainable collaborations.

Regards,

BEE Molewa, MP
Minister of Environmental Affairs



SANPARKS BOARD CHAIRPERSON

Protected areas and national parks remain the most effective tool that exists for biodiversity conservation. Over the past decade, many developing countries' governments have cut their budgets for protected areas by more than half. In addition, international aid for biodiversity conservation has also declined. As a result, protected areas in developing countries receive an average of less than 30% of the funding estimated to be needed for basic conservation management. As a result of declining funding, many national parks in developing countries exist only on paper, lacking enough funds for operations.

In South Africa, forward thinking led to the establishment of an approach that emphasised responsible commercialisation through public-private partnerships (PPP). This, in our view, provides an important solution to meeting the challenge of financial support for the public good that is embodied in conservation management. This approach allows a more business-like management approach and greater financial independence. It also offers a powerful policy tool for improving the economic sustainability of parks, enhancing the quality of services, efficiently leveraging investment in conservation and, through all this, contributing to the core function of protecting biodiversity.

It is for this reason that we would like to broaden the PPP sphere in all our national parks to ensure sustainability, provide sufficient tourism facilities and offerings, and support the achievement of spreading the socio-economic benefits of conservation-based tourism. PPP ventures have the proven potential to leverage benefits such as job creation and enterprise development, particularly in rural areas where there are few other economic opportunities.

I hope you find this inaugural tourism investment summit worthy of your time and investment and that it opens the way to a long and fruitful partnership with the national jewel that is the SANParks estate.

Enjoy the summit!

Joanne Yawitch
SANParks Board Chairperson





SANPARKS CEO

South African National Parks (SANParks) is a renowned global leader in biodiversity conservation and bases its management decisions on best available research. We employ 50 scientists who, together with external research collaborators, produce about 200 peer-reviewed scientific papers per year from the 350 research projects registered in our parks. This sound environmental and social research is key to SANParks' ability to execute its critical mandate of protecting and managing South Africa's natural and cultural heritage.

For decades, conservation has become intertwined with tourism in a co-dependent relationship that is central to the sustainability of both disciplines. It is estimated that more than 50% of all tourists visiting a foreign country visit protected areas during their trip. Similarly, the returns from SANParks' tourism arm is a significant contributor to the sustainability of its conservation activities and social responsibilities.

At the close of the last financial year, SANParks received six million visitors into its 19 parks. Drawn to the hallmark of SANParks' pristine, unspoilt landscapes and abundance of wildlife, each visitor that passes through our gates contributes directly to the maintenance and sustainability of South Africa's conservation estate.

Managing over 15 000 beds, SANParks is indisputably a major player in South Africa's tourism industry; our position in the industry is further underscored by the fact that two of South Africa's iconic tourist attractions, namely Table Mountain National Park and Kruger National Park, are within our portfolio.

The National Environmental Management of Protected Areas Act (Act 57 of 2003) officially mandates SANParks to create destinations for nature-based tourism in a manner that is not harmful to the environment. In this vein, the SANParks Commercialisation Strategy was birthed in 2000 in a bid to enhance the parks as nature tourism destinations by diversifying tourism offerings in partnership with the private sector. Through this strategy, SANParks has earned a total income of R816 million through 45 public-private partnerships ranging from cable cars, luxury lodges and restaurants to adventure activities. This model has provided significant funding of conservation and created sustainability for SANParks.

Thank you for displaying an interest in the SANParks public-private partnership programme. I trust that in the 54 new opportunities that are presented here, you will find one that appeals to you. We look forward to crafting new and additional partnerships as we embark on this phase of growth. Remember that there is a park for every season and every reason.

Fundisile Mketeni
Chief Executive Officer
South African National Parks





TOURISM INVESTMENT SUMMIT

WELCOME

The allure of conserved areas to both international and domestic tourists is immense, evidenced by the six million people who visit our parks annually, many of whom are repeat visitors. Research has indicated that Table Mountain and Kruger National Park are considered bucket list destinations in the majority of South Africa's inbound markets and both are coincidentally under the management of SANParks. It would therefore not be misleading to state that SANParks as a conservation entity is integral to the success of the country's tourism industry.

In the past decade and a half, our partnerships with various private sector entities have been pivotal in enhancing the experience of tourists who visit our parks. It is through these partnerships that we have been able to provide an array of facilities that are vital to an enriched tourist experience. These include franchised restaurants, five-star lodges, retail and a wide array of adventure activities such as ziplining.

At this, our inaugural investment summit, we unveil to you, the private sector investor, new business opportunities within our parks; we trust that both this catalogue and the deliberations at the summit will whet your appetite sufficiently for further engagement and discussion. The opportunities detailed here are derived from the SANParks 2022 Responsible Tourism Strategy, which is premised on connecting to a broader South African society without compromising conservation standards. We deem them to be viable businesses and have chosen them strategically with the aim of filling major product gaps to widen the appeal of the parks to new markets while ensuring that the principal drawcards to our parks are not diluted and continue to hold appeal for our loyal traditional markets.

We hope to welcome you soon to our network of partners. Together we can generate satisfactory returns from tourism business to fund our conservation efforts.

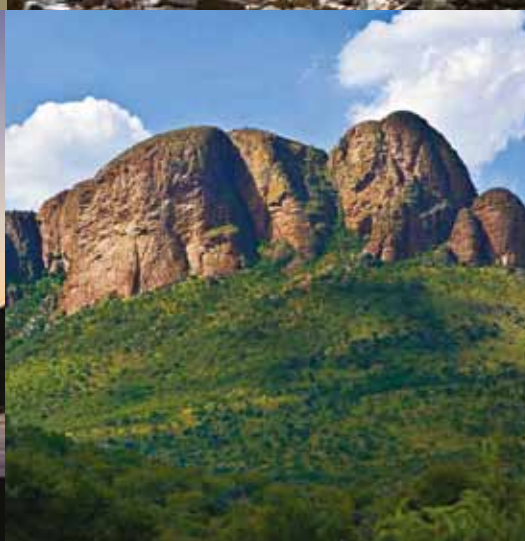
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TABLE MOUNTAIN NATIONAL PARK

This natural World Heritage Site is a haven of magnificent mountains plunging into crystal seas fringed with the bleached white sands of the Cape Peninsula. Voted one of the New 7 Wonders of Nature in a global contest, Table Mountain National Park (TMNP) attracts more than four million visitors a year. The mountain chain stretches from Signal Hill in the north to Cape Point in the south, and is a must-visit for anyone in Cape Town, local or international. From open-access hikes and beautiful forest walks to pristine picnic areas and secluded picturesque accommodation facilities, there is plenty to do, see and experience throughout the park.



Table Mountain National Park cradles the city of Cape Town and offers beaches, mountain peaks and forests within easy drive of the CBD.

HOERIKWAGGO TOURISM PRODUCT

The six-day five-night Hoerikwaggo Trail offers a unique perspective of Table Mountain, taking hikers from the City Bowl to Cape Point. The accommodation facilities aimed at the Hoerikwaggo hikers are also stand-alone destinations in their own right. These include four tented camps (Orangekloof, Silvermine, Slangkop and Smitswinkel), a camp on top of Table Mountain (Overseer's and Disa Cottages), and the Platteklip Wash Houses at the foot of the mountain.

The tented camps offer hot water, comfortable beds, fully equipped self-catering communal kitchens, dining areas, outdoor braai areas, and communal bathrooms. All tented camps are accessible by car and some have dedicated parking spaces.

The cottages offer hot water, comfortable beds, a kitchenette and bathroom facilities. Overseer's and Disa Cottages are not accessible by private vehicles; only 4x4 service vehicles are permitted access, with a maximum of two trips a day. The Upper and Lower Platteklip Wash Houses are easily accessible by car.



Orangekloof Tented Camp

This 12-sleeper facility is located in the Orangekloof Section above Hout Bay, close to indigenous Afromontane forest areas where the rare red disa can be seen. Of the Hoerikwaggo camps, it is the one with the highest occupancy, with hiking being the most popular activity. On the same footprint there is the Old Farmhouse, which can be upgraded for appropriate use associated with the tented camp. Orangekloof is a restricted area and an access permit to the area is up for review.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.



Silvermine Tented Camp

Although situated well away from suburban Cape Town in the Silvermine Section of TMNP, this facility is conveniently located just off Ou Kaapse Weg en route to Noordhoek. The site is within walking distance of Silvermine Dam. The Silvermine Section is a playground for outdoor enthusiasts, with open water swimming, mountain climbing, hiking and mountain biking on offer. A small section of the 12-bed tented camp was damaged in a fire in 2015 and requires reconstruction.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.

TABLE MOUNTAIN NATIONAL PARK



Slangkop Tented Camp

Located next to Slangkop Lighthouse on the edge of Kommetjie, this 12-bed venue is perfect for watching the sunset. The camp lies nestled in the milkwood trees to reduce visual impact. Popular activities are marine and coastal birdwatching, hiking, surfing, diving and other water sports.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.



Smitswinkel Tented Camp

This 12-sleeper camp lies across the road from the entrance gate to the Cape of Good Hope Section of TMNP, the busiest gate in SANParks. The amenities set it apart: each tent boasts an en-suite bathroom and kitchen facilities. The camp has a communal indoor braai and external fire pit.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.



Platteklip Wash Houses

The **Upper Platteklip Wash House** is of significant heritage value and is located close to the city centre, yet in a tranquil area on the upper outskirts of Oranjezicht. The Upper Wash House, which can house up to 24 guests, offers fully equipped self-catering accommodation units. On-site parking is available for up to 48 vehicles and the site has an electrified fence.

The **Lower Wash House** is situated below the Upper Wash House, alongside the Platteklip Stream. This historic facility comprises a single building with enclosed washing area with 19th century washbasins partially intact, open/storage area, a residential unit and gardens.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.

TABLE MOUNTAIN NATIONAL PARK



Overseer's and Disa Cottages

These cottages form part of the Hoerikwaggo accommodation stable and have heritage status. They offer the only visitor accommodation on top of Table Mountain and are accessible by hiking from Constantia Nek, Kirstenbosch or Newlands. The cable car may be used to lessen the impact of the hike. Vehicular access from Constantia Nek is via the steep forestry management track and is restricted to operational use. There are two units: the Overseer's Cottage, with three bedrooms sleeping 10 guests; and Disa Cottage, with three bedrooms sleeping six guests.

OPPORTUNITY: To develop and manage accommodation, hospitality, spa and conferencing, as well as activities such as mountain biking and hiking.

Table Mountain Aerial Cableway Company Lower Station Kiosks Park

Last year, more than 900 000 visitors ascended Table Mountain by cable car. An opportunity exists to rent three individual retail kiosks for tourism purposes only at the lower cable station. The three kiosks are located on the premises of the Table Mountain Aerial Cableway Company, a concessionaire in TMNP. Interested parties have the option of two kiosks measuring 14 m² and one of 3 m². No food or beverage may be offered for sale.

OPPORTUNITY: To rent one or more retail kiosks for a period of five years.



TABLE MOUNTAIN NATIONAL PARK

Tokai Precinct Development

The Tokai Precinct receives around 200 000 visitors a year, drawn by the variety of activities on offer, such as hiking, mountain biking, picnicking and horse riding. The majestic Tokai Manor House and surroundings provide tourism development opportunities, but require heritage assessments and bulk infrastructure.

POSSIBLE COMMERCIAL OPPORTUNITIES INCLUDE:

- **Manor Gardens** – picnicking, market gardens and functions
- **Manor House** – restaurant, functions and conferencing
- **Adventure/ recreation** – mountain biking and equestrian activities
- **Orpen House** – design and training centre, exhibitions and interpretation
- **Commonage areas** – markets, functions and picnicking
- **Old stables and brick house** – adventure centre, retail outlets and coffee shop





Apostle Battery Sites

Situated in a prime location, Apostle Battery overlooks the picturesque seaside town of Llandudno on the Atlantic Ocean. The site shows potential for a boutique hotel, World War II interpretation centre, wellness centre and spa, and a functions venue. There are two sites, namely Site A, which is 60 000m² in size, and Site B, which is 24 000m² in size. SANParks will undertake a Phase I Heritage Assessment in due course. Bulk infrastructure services are required. Slope stabilisation, alien clearing and erosion prevention need to be attended to.

OPPORTUNITY: To develop a boutique hotel, wellness centre and spa, functions venue and interpretation centre.



Groote Schuur Estate Old Zoo Site

Groote Schuur Estate on the lower slopes of Devil's Peak is a popular destination with both local and international visitors, the primary attraction being Rhodes Memorial and its tearoom. In addition, the Old Zoo site, located next to the University of Cape Town and long since closed as a zoo, has substantial potential for visitor facilities if appropriately upgraded. The Old Zoo site is already successfully utilised over the summer season for theatre performances and offers strong potential for multifunctional use. A heritage assessment and bulk infrastructure upgrade is required.

OPPORTUNITY: To develop multifunctional visitor facilities such as an open-air theatre and restaurant.



Signal Hill

Signal Hill is the northern-most tip of the terrestrial area of TMNP and offers excellent views of the city and harbour. It is from here that the noonday gun marks 12h00 in Cape Town. It is estimated that Signal Hill receives up to 5 000 visitors per day in the peak tourist months of December to February and over 800 000 visitors a year despite a lack of major visitor facilities. For many tour operators, Signal Hill is the first stop as it gives visitors a global view of the city. Currently facilities are limited to a few picnic sites, viewing decks and dry toilets. There is electricity on the site, but no water or sewerage.

The site is ideal for the development of a restaurant as well as an adventure and events facility. Development proposals investigated include a mechanical people mover (funicular or cableway) from the Strand Street Quarry to the Signal Hill Summit. This would open the site to more visitors while relieving traffic congestion on Kloof Nek. Feasibilities confirm that the focus for tourism development should be on the Summit and Appleton Camp (900 m away) as the Signal Hill Precinct.

In 2014, a Technical Feasibility Study and Risk Assessment for a people mover at Signal Hill was undertaken. The objective was to assess the technical feasibility, risks, benefits and financial feasibility of a people mover. The recommendations were for a three-phase development consisting of Phase 1: Development of the Signal Hill Precinct (the summit); Phase 2: Development of the Strand Street Quarry and People Mover; and Phase 3: Development of the Lion Battery Precinct.

Phase 1: Development of the Signal Hill Precinct

The study found that:

- A viable people mover will be reliant on a developed Signal Hill Precinct. For this, the provision of services (water, sewage, electricity) to the summit is critical, as none is currently in place.
- Parking and access must be considered as the additional attractions (restaurants, kiosks, picnicking, etc.) will require substantially more parking.
- The summit is an open access facility used by the public at no cost. Charges by the private party will be limited to the commercial facilities.
- SANParks has an agreement with a private operator that offers paragliding from the summit.
- An alternative picnic area should be provided.
- A traffic impact assessment must be done.
- Visitor and traffic counts needs to be measured.
- A heritage and visual impact assessment needs to be undertaken.

OPPORTUNITY: To develop Signal Hill Precinct with restaurants, kiosks and picnicking.

WEST COAST NATIONAL PARK

The West Coast National Park lies just inland from the secluded harbour of Saldanha Bay, and only one-and-a-half hour's drive from Cape Town. The key conservation areas of West Coast National Park are Langebaan Lagoon and the offshore islands in Saldanha Bay, which together form the Langebaan Ramsar site, a wetland of international importance. The lagoon has a rich diversity of marine invertebrates and seaweeds and supports approximately 10% of the coastal wader population in South Africa. The offshore islands provide important nesting areas for several red-listed seabird species.



Situated 100 km north of Cape Town, West Coast National Park and Langebaan Lagoon provide a haven for holidaymakers and bird species.



Malgas Island

Malgas and Jutten Islands

Malgas and Jutten Islands offer exclusive marine and birding experiences. Both are uninhabited and have a number of buildings dating from the whaling era that are unused, except for researchers who stay for short periods. The demand is extremely high for visits to the islands for birding and spiritual reasons. The requirement is for a visitor-friendly jetty to be erected and the refurbishment of the existing buildings to accommodate a reception, kiosk, wooden boardwalks and viewing decks. This opportunity could be linked as a joint option to the Langebaan Lodge development or may be a stand-alone venture.

OPPORTUNITY: To construct a jetty and refurbish historic buildings.

Langebaan Lodge Site

The 1,6ha Langebaan Lodge site is scenically placed and holds high development potential. The Saldanha Bay Municipality's Integrated Development Plan favours waterfront development for Langebaan.

OPPORTUNITY INCLUDES DEVELOPMENT OF:

- An 80-125 room lodge
- Conference facilities
- Retail facilities providing opportunities for stallholders and formal shopkeepers
- Offices and an information centre
- An upmarket restaurant as well as a family restaurant
- A new jetty or expansion of the South African National Defence Force jetty, from where boat concessionaires could operate charters to the bird islands
- Facilities for the local fishing community
- Facilities for day visitors



WEST COAST NATIONAL PARK



Geelbek Restaurant

The Cape Dutch restaurant known as Geelbek Restaurant is set in a heritage building overlooking Langebaan Lagoon. The opportunity involves operation of the restaurant and includes prospects such as wedding and conference facilities within the Geelbek Restaurant precinct. It also includes the right to operate a retail facility at the restaurant precinct.

OPPORTUNITY: To operate Geelbek Restaurant and develop related facilities.

AGULHAS NATIONAL PARK

This park was established to protect a unique landmark, the southern tip of the African continent at Cape Agulhas, which is also the official meeting point of the Indian and Atlantic oceans. Over the summer period, Africa's southernmost tip attracts some 35 000 visitors. The windswept, ruggedly beautiful coastal plain conserves an area of botanical significance, the Lowland Fynbos, with about 1 751 plant species. There is also a rich cultural heritage including shellfish middens created by foraging Khoekhoen people before colonial settlement. Among the mysteries associated with this region are the many ships that were wrecked en route to the East.



Agulhas National Park lies adjacent to the coastal village of L'Agulhas, some 210 km from Cape Town.



AGULHAS NATIONAL PARK



Retail Cape Agulhas Lighthouse

The L'Agulhas Lighthouse is a heritage building dating back to 1849 and an international and local icon of the L'Agulhas Precinct and Agulhas National Park. The recently restored building has strict heritage and architectural regulations to adhere to. Further construction will take place within the L'Agulhas Precinct by SANParks and Transnet National Ports Authority to enhance the Southern Tip of Africa tourism experience. Construction is estimated to end by 2017. Plans to work around the lighthouse and its tenants while construction is taking place have been considered to not deter visitors from frequenting the area in peak season.

OPPORTUNITY: To rent the 35m² retail space for tourism purposes.

Agulhas Precinct Plan Tourism Development

The Southern Tip Precinct Development is an investment from SANParks to create a tourism, cultural and information hub for the Cape Agulhas Lighthouse Precinct. The planning is complete for the development of an 80-seater coffee shop, retail and vendor kiosks to entertain visitors when visiting the southern tip of Africa. Agulhas National Park is a successful destination park with a growing potential for new products and new visitors.

OPPORTUNITY: To operate a retail facility, coffee shop or interpretive museum.





GARDEN ROUTE NATIONAL PARK

Known as one of the most beautiful stretches of shoreline in the world, the Garden Route on South Africa's south coast attracts more than 443 000 visitors a year. It is home to indigenous forests, lowland fynbos, a multitude of rivers and lakes, pristine beaches and rugged mountains. The region's marine protected areas and mountain catchment areas are of national importance. The Garden Route National Park (GRNP) incorporates three distinct areas: Knysna, Wilderness and Tsitsikamma.



Located close to the city of George, Garden Route National Park embraces various coastal towns, from Sedgfield in the west to Storms River in the east.

KNYSNA SECTION

The Knysna National Lake Area (KNLA) is set in the heart of the Garden Route and adjacent to the seaside town of Knysna. The Knysna Forest is world famous for its magical beauty and giant Outeniqua yellowwoods, some of which are almost a thousand years old. The protected environment is 15 000 ha in size and includes the entire Knysna Estuary and all land areas surrounding the estuary, along the coast from Uitzicht in the west to Noetzie in the east, inland up to Portland and including Charlesford, Westford, Eastford, Gouna commonage and the township area of Knysna. The park is home to the well-known and endangered Knysna seahorse plus a large diversity of marine and birdlife, while vegetation varies from seaweeds to indigenous forests.



Thesen Island Development

Various Public-Private Partnership (PPP) opportunities exist on Thesen Island:

- **A Boutique Hotel:** 1 520 m² of the 4 063 m² development plan is allocated to the construction of a 27-unit boutique hotel. A building footprint of 1 038 m² is to be used for the proposed 27 suites and 16 under-roof parking areas. Parking provides for 47 bays, of which the 16 under-roof areas are still to be constructed by the private party.
- **Houseboats:** The Site Development Plan makes provision for a 572 m² mooring facility for 12 houseboats. The maximum size permitted should be a vessel of 8 m. The houseboat operator will be responsible for building floating mooring as required for the proposed product. Parking is provided for 12 vehicles. The development of the structure was approved in the original Environmental Impact Assessment. There is a possibility that in terms of legislation, it will still require a basic assessment. All South African Maritime Safety Authority (SAMSA) requirements in terms of houseboat operations must be met.
- **Multi-Use Conference Facility:** A plinth was constructed in 2004 by Thesen Island Development Company: the successful bidder will be required to reimburse them for the costs. SANParks requires an attractive multipurpose conference type development that will complement the surrounds. The plinth is measured to be 16 m x 8,5 m. Since there are no services supplied to the site, the successful bidder will need to supply services.
- **Retail Facilities:** Two retail opportunities of 265 m² each exist with a further three opportunities of 90 m² each. SANParks previously constructed an additional two of the retail facilities for offices but will make alternative arrangements for offices should the need arise.



Garden of Eden Canopy Walkway

An opportunity exists for the construction of a treetop canopy walkway at the Garden of Eden, also known as the Central Node. The development strategy saw this as an anchor activity for the already popular Garden of Eden Precinct. The intent is to develop an activity hub at this precinct that would cater for the needs of the diverse groups of visitors to this popular area. The plans for this precinct include a small coffee shop, a craft shop and an information and booking office. Potential challenges to the proposed project include the lack of parking space and its location next to the highway (N2), which requires the involvement of South African National Roads Agency Limited (SANRAL). A preliminary study has been undertaken by SANRAL and the results prove that the hub could be implemented. The cost is estimated to be more than R30 million for the basic infrastructure, parking and an overhead bridge to ferry tourists to where the activity would be situated across the N2. Some of the investment for the project could be sourced from the Infrastructure Investment Fund while the Canopy Walkway is a PPP opportunity.

OPPORTUNITY: To construct a treetop canopy walkway at the Garden of Eden.

TSITSIKAMMA SECTION

Situated in the picturesque tourist region known as the Garden Route, Tsitsikamma protects a wonderland of inter-tidal and marine life. This is one of the largest single unit 'no take' (including fishing) Marine Protected Areas in the world, conserving 11% of South Africa's temperate south coast rocky shoreline and providing a 'laboratory' for fisheries baseline research on endangered line fish species. The spectacular coastline is complemented by slopes of fynbos and temperate high forest. The Tsitsikamma Section recently celebrated its 50th year, marked by the announcement of a R60 million-plus infrastructure investment project. This investment would be spent on upgrades to the Restaurant Precinct and the Big Tree Precinct.



The Big Tree Coffee and Curio Shop

The bulk infrastructure at the Big Tree Precinct requires upgrading due to the increase in visitor numbers to the site. Located along the N2, the Big Tree currently draws 57 000 visitors a year. The beautiful yellowwood trees in the forests of Tsitsikamma gave rise to an entire timber industry until South Africa's national tree became an endangered species. The Big Tree is estimated to be between 600 and 800 years old, stands 36.6m tall and has a trunk circumference of 9m. The forest boardwalk is well maintained and visitors can walk the 1 km round trip to Tsitsikamma. It is also the starting point for two forest trails of 2.6km and 4.2km.

An assessment of the possible tourism products for the Big Tree identified a curio shop, which will largely sell locally produced arts and craft material, and a coffee shop, which would sell sit-down meals as well as takeaways. This restaurant would be small with seating space for no more than 60 people. An activity hub would highlight the various activities found in the Tsitsikamma Section of the GRNP.

OPPORTUNITY: To develop a curio shop and a coffee shop.



Tsitsikamma Boutique Hotel

An opportunity exists to upgrade the 17 Oceanettes in Storms River Mouth Rest Camp. The units already have the look and feel of a small boutique hotel. They are situated right on the edge of the ocean, next to the starting point of the Waterfall Hiking Trail. Large groups prefer to stay in the Oceanettes because they are in close proximity to one another. The units also have a small conference room, a useful facility that adds to their appeal. The basic infrastructure can easily be upgraded to a hotel facility. Over the past five years, the Oceanettes have maintained occupancy levels of over 70%. In their current form the Oceanettes have become very popular and their solid reputation among tourists is another plus factor to any developer. A boutique hotel on this site will further enhance the huge tourism reputation that the Tsitsikamma Section of Garden Route National Park enjoys.

OPPORTUNITY: To construct and manage a boutique hotel.



WILDERNESS SECTION

Along South Africa's famous Garden Route, a captivating world of lakes, rivers, estuaries and beaches gently unfolds against a backdrop of lush forest and lofty mountains. The Wilderness Section of the GRNP offers nature trails, birding opportunities and water sports. During spring, a carpet of flowers further enhances the verdant beauty of this national park. The Wilderness Section stretches from the Touw River mouth to the Swartvlei estuary and beyond, where it links with Goukamma Nature Reserve, giving welcome protection to five lakes and the Serpentine, the winding strip of water joining Island Lake to the Touw River at Ebb & Flow Rest Camp.



Swartvlei Water-Based Activities

The Swartvlei is part of the river system in the Wilderness Section of the GRNP. It is believed that the river is about 16m deep, making it the deepest of all the rivers in the Wilderness Section. The river is estimated to be about 16km long and for six months of the year, it is connected to sea before the mouth silts closed for the remainder. The river is part of a Ramsar site and has a large number of bird species, drawing birdwatchers on a regular basis, as well as various fishing species, with fishing spots frequented by anglers.

OPPORTUNITY: To offer water-based activities that could include houseboats, river cruises and fishing cruises.



Goudveld (Millwood) Tea Garden

The Goudveld (Millwood) area has a history that is rooted in the discovery of gold in the 1870s, followed by the activity of woodcutters, up to the 1930s. This heritage has been captured in books by Dalene Matthee, including *Circles in the Forest*, and the area has become a sought-after tourist destination. Many years ago, historians and engineers familiar with the area and its heritage brought to life some of the main attractions of the old mining village. This included the restoration of the Materolli building, now the Goudveld Tea Garden, and the old accommodation, known as the Pitt Street House. The old village is a heritage site.

An opportunity exists for a private operator to manage the tea garden, mine tours and the Pitt Street House accommodation unit. The tearoom also houses the woodcutters museum, which has artefacts and exhibits telling the story of the woodcutters of the early 1900s.

OPPORTUNITY: To manage a tea garden and accommodation.

KAROO NATIONAL PARK

Located in the Western Cape, on the southern slopes of the Nuweveld Mountains, Karoo National Park is a place of big skies and seemingly endless views. The park is a convenient stopover on the N1 route between Gauteng and Cape Town, about 500 km away. The park lies in the semi-arid Nama-Karoo and Grassland biomes, and its complex environment, ranging from open plains to high mountains, provides many niches for animal and plant species. The park has a wide variety of endemic wildlife, with 58 mammal species, more than 200 bird species and a rich reptilian fauna including 18 snake species and five tortoise species.

The entrance to Karoo National Park lies just 12 km from the town of Beaufort West. The park is famed for its dramatic landscape.



Activity Hub

An opportunity exists for the development of a tourism activity hub located along the N1, from the current entrance gate to Karoo National Park westwards to where the Oudtshoorn road joins the N1. The hub will provide park guests and casual visitors with an array of facilities and activities.

OPPORTUNITY: To construct and manage overnight accommodation and camping, a visitor interpretation centre, retail/convenience store, activities, curio shop, park and ride facility, children's play facility, various food and beverage outlets, and possibly, subject to the required approvals, a filling station (Petroport).



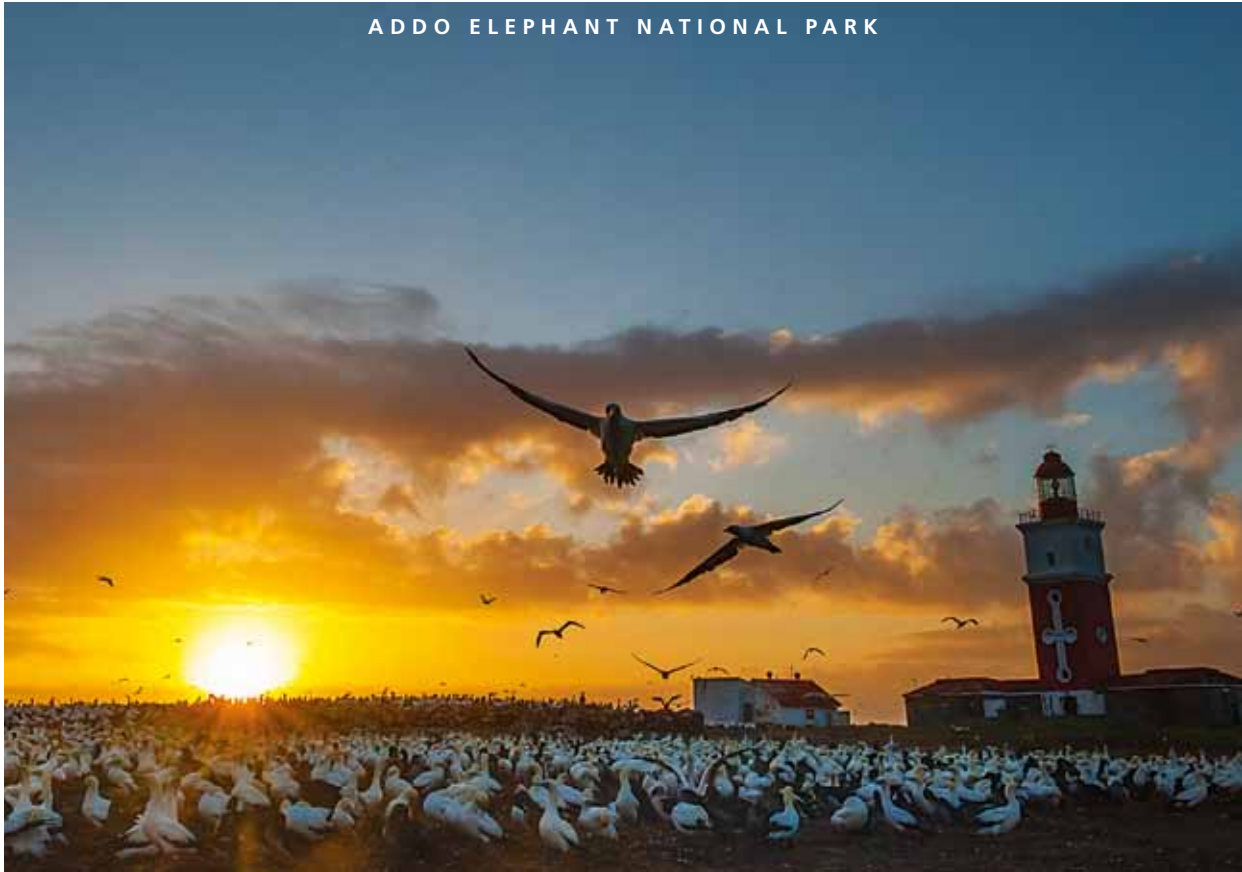
ADDO ELEPHANT NATIONAL PARK

Discover, experience and explore a world of diversity in one park. Now the third-largest national park in South Africa, Addo Elephant National Park (AENP) has expanded to conserve a wide range of biodiversity, landscapes, fauna and flora. Situated in the Eastern Cape, the park stretches from the semi-arid Karoo around Darlington Dam, over the Zuurberg Mountains and down through the Sundays River valley to the coast, to between the mouths of the Sundays and Bushman's rivers. Established in 1931 to save 11 elephants on the brink of extinction, it is now home to more than 350, as well as 280 Cape buffalo, black rhino, a range of antelope species and the rare flightless dung beetle. AENP is a perfect destination for the adventurous outdoor enthusiast and nature lover. The park receives about 231 000 visitors annually, of which 42% are international visitors.



Addo Elephant National Park is situated 72 km from Port Elizabeth and is the only park that is home to the Big Seven (Big Five plus the great white shark and southern right whale).





Bird Island Helicopter Flights

In beautiful Algoa Bay lie the seven islands of the Bird Island group. In 2002, the Greater AENP was given the responsibility of managing the Bird Island Group Marine Protected Area. Bird Island, which is the breeding, nursing and roosting ground for a large number of marine fauna species, is regarded as the one most attractive to tourists. This island is home to South Africa's most charismatic seabird, the African Penguin, and possesses other significant birding attributes. Historians believe that Bird Island holds fascinating stories of human solitude and privation. This, coupled with its ornithological significance, makes Bird Island a major attraction to visitors.

Access to Bird Island is a huge challenge because of its remoteness, as well as the fact that there is no safe harbour or place to anchor vessels. A lack of accommodation and shelter further contribute to the isolated nature of the Island, especially during days of inclement weather. Due to the demand and SANParks' conservation and tourism mandate to make the island accessible to tourists, an opportunity exists for an operator to do helicopter flights to Bird Island. Such flights should be conducted within a very strict management framework, which would ensure that negative impact on the island and birdlife is minimised. It is an exciting opportunity for any investor willing to combine the thrills of helicopter rides with the magnificent birdlife on the island.

OPPORTUNITY: To provide commercial helicopter flights to Bird Island.

GOLDEN GATE HIGHLANDS NATIONAL PARK

In the foothills of the Maluti Mountains of the northeastern Free State lies the Golden Gate Highlands National Park, taking its name from the shades of gold cast on the sandstone cliffs. The 32 690 ha park is home to a variety of mammals and birds, including the rare bearded vulture and bald ibis. The park is best known for its geological, geomorphological and paleontological heritage with rich geology dating back to 195–210 million years ago. Researchers discovered a fossilised dinosaur egg in 1977 and a cluster of six eggs in 2005. This has led to an investment to build a Dinosaur Centre in the park, scheduled to open in 2018. SANParks is eager to position the park as the ultimate 4x4 and adventure destination in South Africa. Private parties are invited to be part of the exciting release of adventure opportunities in the park.



Equidistant from Johannesburg, Durban and Bloemfontein, Golden Gate Highlands National Park lies around three hours' drive from all three centres.



4x4 Trails

New trails will be developed and existing trails upgraded to provide access to the remote mountain areas. **The operator will be required to upgrade three trails and refurbish four existing huts, as well as manage trail logistics, maintenance and visitor comforts.** The Basotho Cultural Village will serve as the launch area for 4x4 trails and other adventure activities in the Qwa-Qwa section. Office space will be made available for the operator.



Archery

The opportunity exists for an operator to establish, market and manage archery activities in the park. The site has not been identified but the park will assist with identifying the most suitable area on advice from the operator.



Horse Trails

The park has offered horse riding as an activity for many years and it has become a feature of the visitor experience. **A PPP opportunity exists for the management of the entire operation including the management of the horses, the stables and the quality of the visitor experience.**



Quad Bikes

Permission to use quad bikes may be granted as part of the offering of specialised tours into selected areas. Quad bikes could also be used as part of an interpretive tour of the park for a general orientation to the park's natural and cultural attributes.

Spa Facility

The Golden Gate Hotel lends itself to provision of a spa facility. **An opportunity exists for an operator to provide a full spa and wellness service to guests.**





Mountain-Bike Trails

The park offers diverse and challenging mountain-bike (MTB) terrains. **An opportunity exists for the design and management of trails incorporating different specialist trail gradings.** The aim is for the park to develop an international reputation as a mountain-biking destination to compete with the best in the world. It is intended that these trails would also be used for related events such as trail running, geocaching, triathlons, bouldering or similar.



Guiding

The park is currently expanding the hiking trail network. Some of the new trails will be guided as they go into sensitive areas. **New opportunities will be available for specialised guiding that addresses niche interests;** these include palaeontology, battlefields, geology, birding, stargazing, rock art and a unique snow experience. The opportunities may be offered individually per specialisation or as a suite of rights to a single operator.



Cross-Border Tours

The park forms part of the Maloti-Drakensberg Transfrontier Conservation Area, a conservation initiative between Lesotho and South Africa focusing on the magnificent Maloti-Drakensberg mountain range forming the border between the two countries. **Operators will be invited to develop cross-border tour packages into the remote exclusive highlands that include the park as a special-rates accommodation and refreshment option.**



Ziplining, Paragliding, Abseiling

Ziplining, paragliding and abseiling will be considered for release to a single operator. This is to simplify oversight and offer the investor the best options for financial return. The operator will be expected to invest capital to establish the opportunities. Sites have yet to be determined but investors are referred to the park management plan for the zonation map, which indicates the areas designated for high-density and low-density leisure activities.



Hot Air Ballooning

SANParks will take recommendations from experts on the feasibility of hot air ballooning. It appears from early investigations that anchored ballooning is likely to be the preferred option. If confirmed, proposals will be invited for the supply and operation of the opportunity.

DINOSAUR CENTRE

The National Department of Tourism has made funding available for the construction of a Dinosaur Educational and Interpretation Centre in the park. This will incorporate an activity centre and children's play facility as well as a food kiosk/deli and curio shop. This development will create the opportunity to radically change the profile of the park from an accommodation (hotel and camping) experience to an activity-driven outdoor experience, along with quality interpretation and modern retail facilities.

OPPORTUNITIES:

- To provide light lunches and takeaways. Take note that the food kiosk/deli is not a restaurant and will function only during normal daylight hours.
- To establish and manage a curio shop. The operator will have rights to design, stock and market curios where the opportunity for beneficiation to local communities to invest, supply products and create employment is high.

GROENKLOOF NATIONAL PARK

Groenkloof National Park is located on a hill above the University of South Africa and opposite the Tshwane Telkom Tower in Pretoria. Unlike the other national parks, Groenkloof's primary aim is not to conserve biodiversity, but to provide centralised offices in the country's capital. Groenkloof National Park plays host to the SANParks head office and central reservations office. Despite the urban location of the park, the park has some natural bush with an impressive diversity of wildlife for suburbia, including hyrax, duiker, bush baby, mongoose and around 150 bird species.

Situated adjacent to the city centre in Pretoria, Groenkloof National Park is also easily accessed from Johannesburg.



Groenkloof Tourism Products

As the green heart of Pretoria, the 7 ha of Groenkloof National Park present an opportunity for innovative tourism products. The park is strategically located in relation to existing attractions (Union Buildings, Voortrekker Monument, Freedom Park, Fort Klapperkop, Fort Skanskop and the CBD) and its position on an elevated site creates a visual linkage with these historic sites. This feature is unique and presents an opportunity to establish a gateway of connectivity to these landmarks. The opportunity includes the implementation and management of a legacy museum that showcases SANParks' role as South Africa's primary conservation agency. Furthermore, it includes the opportunity to create tourism accommodation for employees and guests, an on-site restaurant and multifunctional spaces for conferencing and possibly function hosting. The products should be marketed to create awareness and interpretation programmes should be tailored for learners.

OPPORTUNITY: To provide tourism products including a museum, accommodation, a restaurant and conferencing facilities.



Wild® Brand Merchandising

SANParks owns the registered trademark to the Wild® brand and all its products, and wishes to proceed with the commercial development of a range of apparel-based products. An opportunity exists for manufacturers with expertise in technical outdoor merchandise.

The brand's value has been estimated through a recognised process, and potential brand extensions include apparel, accommodation and restaurants, to name a few. SANParks is currently investigating the feasibility of a PPP opportunity for commercial use of the Wild® brand on merchandise. The brand has been trademarked and licensed separately in classes 3, 4, 8, 9, 14, 18, 20, 25, 29 and 30.

The Wild® brand would require extensive development, design and distribution support from key role players within the brand value, manufacturing and distribution disciplines. SANParks would therefore partner with, or license the brand name to, an existing entity with the necessary attributes.

OPPORTUNITY: To develop Wild® brand extensions.



Solar Harvesting

An opportunity exists whereby a private party that manufactures solar panels could use SANParks' Head Office roof space (in excess of 1 ha) to harvest sun energy. Direct savings could be shared between SANParks and the private party (percentage split to be determined to allow for the private party to make a return on its investment). The private party will be expected to provide and install solar panels. Following a detailed assessment of electricity cost at Head Office, the private party will bid a percentage share of the savings; for example, of the savings SANParks will receive 30% and the private party 70% over a term of 30 years, or SANParks will receive 10% and the private party 90% over a 15-year term. This will allow for repayment of the assets by the private party. Following this the assets will revert to SANParks. The private party has a unique opportunity to showcase their products and to verify savings. The private party can then use this as marketing, thanks to SANParks' prominence in the environmental space. In addition, the private party could be involved in a solar farm in the Richtersveld where local community members could be employed and the power generated fed into the national grid.

OPPORTUNITY: To provide solar panels for SANParks Head Office.

MARAKELE NATIONAL PARK

Marakele National Park lies in the heart of the Waterberg Mountains, just 250 km from Johannesburg and 15 km north of Thabazimbi. The park was declared in 1994 and is still in a phase of consolidation but its picturesque setting creates a spectacular bushveld experience. It is considered to have substantial development potential due to its location and proximity to Gauteng, making it an ideal weekend or breakaway option. There are currently few activities offered in the park due to the limited road network; however, this has been prioritised to enable the visitor to experience the full wonder of the park. New activities are aimed at diversifying the park's offering and increasing the adventure element.



Within three to four hours' drive from Gauteng, Marakele National Park is a malaria-free area where the Big Five can be seen.



Activity Hub

Planning has begun for the development of a tourism activity hub located at the park entrance gate. The hub is aimed at providing both park and casual visitors with a range of exciting facilities. **Opportunities for private party investment will include a visitor interpretation centre; curio shop; retail/convenience store; activities reception, sales and logistics office; park and ride facility; coffee shop/cafeteria; and children's play facility.**



Adventure Activities

Various adventure opportunities will be considered for release to private operators on a lease or permit basis, the list not being exhaustive. Some activities are likely to be packaged together to simplify contract management and to offer the best options for financial return. The activities include:

- Development of new guided 4x4 eco-trails with different grades and overnight facilities.
 - Opportunity for a specialist operator to offer guided rock climbing, abseiling, rappelling, bouldering and geocaching as a suite of activities.
 - A canopy tour through the gorges that includes ziplines, swing bridges and treetop platforms.
 - A hang-gliding/paragliding experience combined with guided hiking trails will be explored. This may be combined with other opportunities such as quad biking.
 - Development of MTB trails of various lengths and difficulty levels.
 - The rights to use the park for the presentation of short courses that may include birding, botany, bush skills, tracking skills, bush homeopathy and astronomy as well as long-term courses in ranger training, field guide training and nature-based hospitality.
-



Safari Lodge

A 30-unit lodge development is being considered inside the park that will include a restaurant facility, swimming pool and gym and will offer a full-service experience to guests.





KRUGER NATIONAL PARK

Where nearly two million hectares of unrivalled diversity of life forms fuses with historical and archaeological sights – this is real Africa. The world-renowned Kruger National Park (KNP) offers a wildlife experience that ranks among the best in Africa. Established in 1898 to protect the wildlife of the South African Lowveld, this national park is a world leader in advanced environmental management techniques and policies.

As the flagship of 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. Every year more than 1.8 million visitors flock to South Africa's leading game park.



The Kruger National Park straddles Limpopo and Mpumalanga provinces, around five to six hours' drive from Gauteng. Major centres nearby are Nelspruit and Phalaborwa.

Phalaborwa Activity Hub

The Phalaborwa Activity Hub will enrich the experiences of park visitors and diversify the range of activities on offer. It will be located on the periphery of the KNP, south of the existing Phalaborwa Gate entry point. Bordered by the KNP on one side and the town of Phalaborwa on the other, the activity hub will be accessible to people staying both inside and outside the park. SANParks has received funding which will cover the bulk infrastructure as well as the general layout and completion is planned for end 2017. The hub will be in keeping with Kruger's ethos of responsible tourism and activities will have as close to zero environmental impact as possible.

The following contemporary activities with excellent interpretation are envisioned for the activity hub:

- Archery
- Mountain biking (guided and non-guided)
- Microlight flights (in close vicinity)
- Spa treatments
- Mining tours
- Community tours
- Game drives
- Cultural tours (including Albasini)
- Various shows at the amphitheatre including drumming, reptile education, food preparation, cheese making, belt/leather and knife making, and indigenous games (teaching and playing), as well as the facilities of a beer brewery and wine bar.
- Bush braai
- Anchored hot air balloon
- Hiking (guided and non-guided)

In addition to the activities, the following accommodation will be on offer, with an aim to diversify the current SANParks accommodation offering:

- Backpacker's lodge
- Mobile tented-safari area
- Overlander area
- Tented camp

OPPORTUNITY: To invest capital in the establishment of one or several of the activities and accommodation options.





Mobile Tented Safaris Kruger (winter) and Knysna (summer)

Seasonal tented camps evoke the essence of going on safari, providing guests with a sense of solitude and relaxation. The opportunity exists for an operator to manage two full-service luxury tented camps (maximum 60 guest beds) over the winter period in the central region of the Kruger National Park, and one full-service tented camp (maximum 50 guest beds) over the summer period in the Knysna section of Garden Route National Park. The operator will need to provide all equipment and bulk services for these fully self-sufficient camps, and will be allowed to offer game drives and day walks to guests.

OPPORTUNITY: To develop and operate seasonal tented camps.



Bush Braai at Phabeni Gate

A bush braai offers guests the chance to combine a game drive with a delicious campfire meal. The opportunity of a bush braai product exists at Phabeni Gate. The opportunity involves morning and night game drives in OSVs and bush cuisine consisting of bush breakfasts and bush braai/dinner. Morning drives depart at 06h00, stopping for a bush breakfast around 08h00 and ending at 11h00. Night drives begin at 16h00, breaking for a bush braai/dinner around 20h00, in an open area setting with a campfire, dining tables, chairs and lanterns, and end at 22h00.

OPPORTUNITY: To supply three 10-seater OSVs departing from Phabeni Gate for morning and night game drives and to provide a bush meal experience for 30 guests.

Phabeni Gate is situated close to the town of Hazyview and within easy reach of Skukuza and Pretoriuskop Rest Camps.



Mobile Tented Safari

Seasonal tented camps capture the essence of bush exploration. The opportunity exists for a full-service tented camp to be erected on an allocated site. This unique product would operate from March to September annually to escape the heat of summer. The operator will be required to provide bulk services for this fully self-sufficient camp. To allow for variety, the location of the camp might vary from year to year. Designated sites might be anywhere in the park from the south to the north. The camp would allow for a maximum of 100 guest beds.

OPPORTUNITY: To erect and manage a mobile tented camp.



Pafuri Rustic Camp

The lush and tranquil Pafuri area is the ideal setting for a camp that touches the Earth lightly. The opportunity exists to develop, manage and maintain a camp with zero impact on the environment, with no noise or services, but with natural landscaping and off-the-grid services. Units erected should be non-permanent, which implies the impact should not be noticeable when the units are taken down at the end of the contract period. To meet this requirement, the units would need to be on stilts or make use of another method that limits damage to the environment. Due to the proximity of the camp to the bird-rich Pafuri area, the camp will most likely be popular with birders, photographers and people with a passion for silence and meditation.

OPPORTUNITY: To develop and manage a low-impact camp.



Tree House Products (two opportunities)

Visitors can look forward to a unique experience in Kruger's treetop accommodation. Opportunities exist for two unfenced camps within the tree canopy. The camps could be either fully catered or self-catered depending on market demand. Each camp will have a maximum of 15 tree houses, with three small clusters of five tree houses each offering privacy. Services will be provided from a central point. It is anticipated that the one camp will be suitable for families with children while the other will allow for a discreet, more exclusive experience. The likely sites will be mostly in the north of the park but could also be in the central region, i.e. Olifants area and north thereof.

OPPORTUNITY: To develop two camps of tree houses.



New KNP Wilderness Trail

An opportunity exists for the development and operation of an 8-bed (4 x 2 beds) wilderness camp in the Tshokwane area of the Kruger National Park. A wilderness trail entails a three-night stay in a rustic, primitive camp whilst experiencing the African bush on foot twice during the day. Trailists will experience all facets of nature, getting to see, smell, hear, touch and even taste wild things. The product is fully catered with guests enjoying appealing breakfasts and bushfire dinners in the lapa. Trails rangers provide extensive interpretation services to guests.

OPPORTUNITY: To establish a new wilderness camp and operate guided trails.



Phabeni Education Centre and Summer Camp

An opportunity exists to establish, upgrade and manage an education centre at an existing site near Phabeni Gate. The operator will be required to provide a variety of properly accredited environmental education products for primary and secondary school learners. These products would ideally range from basic environmental education sessions to extended summer camp-type offerings. Camps will provide input on conservation and biodiversity topics as well as topics related to personal development, leadership, diversity, and social and life skills. At the same time camps should allow for fun and leisure. A feasible model is suggested to ensure that affordability (of participants) should not be a required criteria so that learners from all backgrounds are able to access this sought-after range of products.

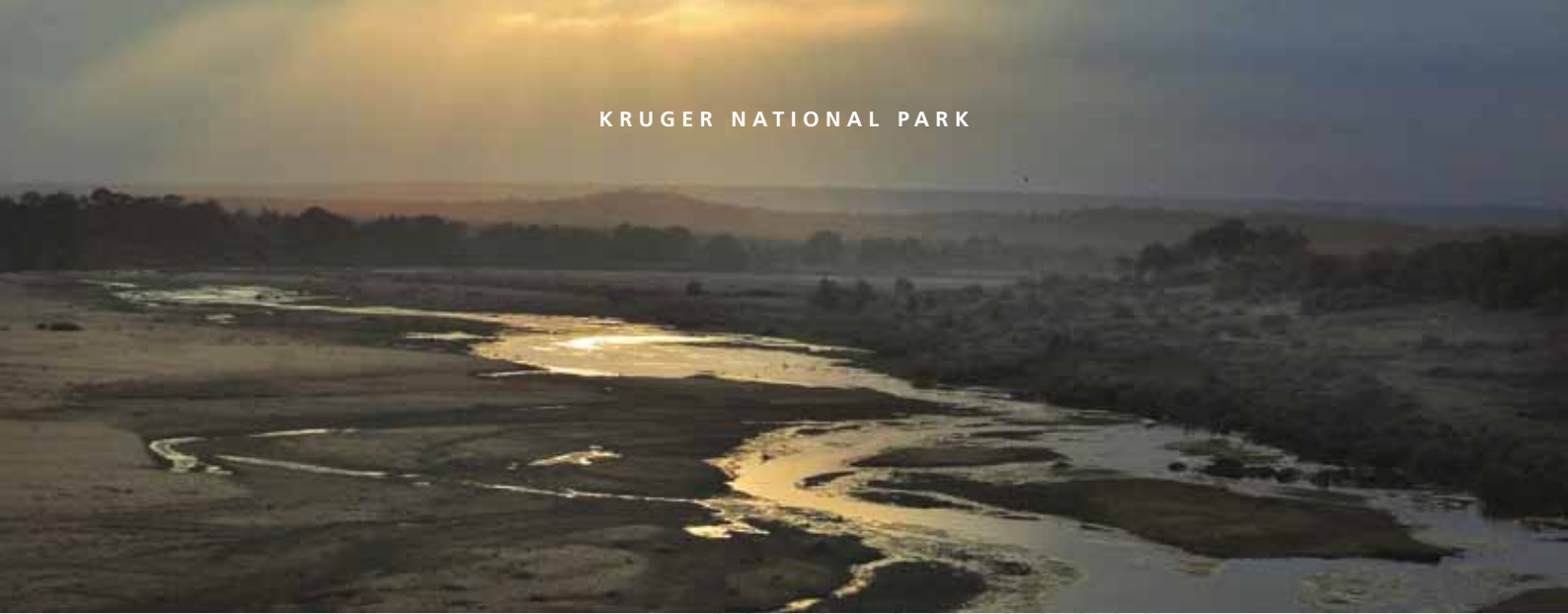
OPPORTUNITY: To upgrade an education centre and operate a summer camp.



Outsourcing of the Skukuza Staff Sports Facilities

An opportunity to operate and manage the Skukuza nine-hole golf course with associated benefits of revenues from membership. The opportunity includes the improvement of the golf course, greenkeeper responsibilities and clubhouse (with retail, food and beverage, and bar opportunities), caddies and golf carts. Further to this, the opportunity could include other sports facilities, such as the gymnasium, squash court, tennis courts and swimming pool in the Skukuza staff village, which could be opened up to the general public.

OPPORTUNITY: To operate the golf course and associated sports facilities.



Letaba Area Concession Lodge

Running through central Kruger, the Letaba River is a prime setting for an exclusive lodge. The opportunity exists for a concession similar to the existing lodge concessions in the park, where the operator will be allowed to develop a road network and have exclusive traversing rights. The Letaba concession area is located on the western boundary of the KNP, where the Letaba River enters the park. The area follows the Letaba River for about 20 km and includes the northern bank of the river. Access to the site will be via Phalaborwa Gate. Shimuwini Rest Camp is about 7 km outside the concession area on the Letaba River.

The total area available for exclusive traversing is approximately 15 000 ha. SANParks has established a number of management tracks in the area. The private party may develop additional roads and tracks within the concession area subject to environmental considerations. Mopane woodland scrub dominates the area, except along the Letaba River where a strip of riparian vegetation occurs. The area is generally flat with undulating small hills and a number of seasonal pans scattered in the bush. Black Heron Dam is generally perennial. Elephant and buffalo are fairly abundant and rhino, several species of antelope, lion and leopard also occur. The perennial Letaba River provides excellent game viewing, especially in the dry season.

SANParks has identified several potential development sites along the Letaba River. Bidders may, however, select a site anywhere within the concession area, provided it does not impact other park users. SANParks believes the concession is suited to development of either one lodge or a number of smaller camps or lodges, preferably along the Letaba River. The area may accommodate a total of up to 50 beds with the exact number determined by the location and type of concession product envisioned. The only perennial water source is the Letaba River. Although there are no existing boreholes, it may be possible to access underground water sources. Electricity is not presently available but may be accessed outside the concession area. The use of solar power or generators may be a more feasible option.

OPPORTUNITY: To develop a riverside lodge.



Phalaborwa Safari Lodge Development

Phalaborwa is the gateway to Kruger's north, a region famed for its elephant and buffalo herds. The opportunity allows for a 100-bed peripheral safari lodge development in close proximity (2km) to Phalaborwa with food and beverage, conferencing and access after gate closing time. The objective of the safari lodge is to cater for the 4-star market, which requires more amenities than those on offer at the self-catering camps. It will allow for entry after gate closing time so that guests may drive to the park after work and optimise their stay in Kruger. Due to the fact that the area has limited roads, the opportunity will require the operator to develop additional roads that could also be accessed by the public. Length of roads to be developed will be subject to environmental considerations.

OPPORTUNITY: To develop and manage a safari lodge.



Tshokwane Tented Birding Camp

With excellent game-viewing opportunities, the park's central region is an inviting setting for a camp. The opportunity exists to create a tented camp of approximately 15 tents with a maximum of 30 guest beds. Depending on market demand, the camp may be either fully catered or self-catered. The camp will be located in close proximity to Tshokwane Picnic Site, known for its superb sightings. The camp's intimate size and distance from the main camps (the closest, Skukuza and Satara, are 50km away) will offer a peaceful experience. Guests will also be able to take advantage of exclusive game viewing in the early morning and late afternoon when the area empties of visitors from the main camps.

OPPORTUNITY: To establish and operate a tented camp.



Ranger Training

An opportunity to create a ranger academy for guests to national parks with a variety of training courses focused on environmental skills. The training courses are aimed at visitors who want to enhance their appreciation of the bush while acquiring field skills such as tracking and identifying wildlife. The opportunity will include the development of a curriculum that will attract people from all over the world to develop unique skills.

OPPORTUNITY: To establish an academy for environmental skills training.

Shangoni Cultural Camp

Unique cultural experiences offer a new dimension to visiting Kruger. The opportunity consists of a 30-bed cultural camp in close proximity (5 km) to the new Shangoni Gate with access after gate closing time and offering food and beverage as well as conference products. The camp will complement the new Shangoni Gate and allow for a one-of-a-kind cultural camp where indigenous cuisine and traditional culture are showcased (sourced from the local communities outside Shangoni Gate). The camp will be a perfect linkage with camps in the north such as Mopani and Shingwedzi and will allow visitors the opportunity to view game in areas of the park that were not accessible to the public for many years.

OPPORTUNITY: To construct and manage a 30-bed cultural camp. Close co-operation and profit share with the local communities will be a requirement of this opportunity.



Mobile Spa/Wellness Centre

The beauty of nature heals, restores and energises tired bodies and minds. The opportunity exists for a mobile spa/wellness unit for use in a variety of camps (dependent on demand). SANParks would allocate a tranquil area in or in close proximity to the camp/s where this unique product may be offered. The operator can market this activity from the various camps in the KNP. As there is already a spa in Skukuza, the product will be limited to main and bushveld camps north of and including Satara.

OPPORTUNITY: To operate a mobile spa/wellness centre.



Branded Environmentally Friendly Drinking Water Dispensing

A unique opportunity exists to partner with the current retail operators to provide a more environmentally friendly model for consuming spring water. This will involve dispensing water into a variety of environmentally friendly containers as opposed to the use of plastic bottles. The model will not be limited to retail facilities only, but needs to be introduced to conferencing and events held in the KNP as well. While no agreement has been reached with the current retail operator, it is envisaged that the KNP will, through this initiative, showcase a dedication to conservation. Therefore the supplier and the existing retail operator will find solutions to be both profitable and to display this environmentally friendly initiative.

OPPORTUNITY: To provide water-dispensing points and containers.

Events Management

SANParks seeks to appoint exclusive service providers to manage a calendar of events and a variety of products and/or audiences such as weddings, mountain-bike events, marathons, trail runs, team building, sunset serenades and concerts in the bush.

OPPORTUNITY: To create and manage events.



PRINCIPLES OF ENGAGEMENT

Institutional Framework

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. It is founded 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.

The implementation of the Commercialisation Strategy 2000 resulted in the award of 11 lodge concession sites to private operators as well as the outsourcing of 21 shops and 17 restaurants across all national parks to private operators. Following the implementation of the Commercialisation Strategy 2000, there have been significant developments in SANParks' approach to Public-Private Partnership (PPP) initiatives. SANParks accordingly developed the Strategic Plan for Commercialisation, which is a significant element of SANParks' ecotourism pillar and has as its objective (through the implementation of Public-Private Partnerships) reducing the cost of delivery, improving service levels by focusing on core business, 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. Other high level commercialisation objectives for SANParks include the following: revenue generation; loss minimisation or savings on existing operations; optimal use of under-performing assets; job creation and poverty alleviation; BBBEE; infrastructure upgrades; upgrade/development of historical and/or cultural sites; tourism promotion and further biodiversity protection and conservation.

Over the past 15 years, SANParks has progressively increased the number of PPP transactions, covering a wide range of projects, including accommodation, restaurants, retail, activities, an airport and the Table Mountain Aerial Cableway. By March 2016, there were 45 PPP projects in active implementation. The growing number of PPP projects attests to the growing body of experience related to PPPs, both within SANParks and across the private sector.

Main Contractual Terms

Lodge Concessions

The lodge concessions entail allowing private operators to build and operate tourism facilities within the national parks on the basis of a defined period, usually over a 20-year PPP agreement. Investors take over and upgrade specified existing lodge facilities, or build new ones. The contractual mechanism is a PPP agreement, which enables the private operator to use a defined area of land, plus any building that may already exist on that land, over a specific time period in return for payment of PPP fees. Against these rights of occupation and commercial use of facilities, there is a set of obligations on the part of the private party regarding financial terms, environmental management, social objectives, empowerment and other factors. Infringement of these requirements carries specified penalties, underpinned by performance bonds, and finally termination of the agreement, with the assets reverting to SANParks.



The annual PPP fee payable by the private party to SANParks for any given concession year shall be the higher of a minimum rental as determined by the agreement for the PPP year or a calculated annual PPP fee based on the bidden percentage of actual gross revenue for the particular PPP year.

At the end of the PPP period, the private party shall hand over the concession area, the camp, all concession assets and its rights or interest in the developments to SANParks free of charges, liens, claims or encumbrances of any kind whatsoever and free of any liabilities in good condition, fair wear and tear excepted. The private party shall not be entitled to payment of any compensation in connection therewith.

Performance bonds are provided to SANParks by the private party, which are operative from the effective dates. The private party will maintain valid performance bonds from the effective dates until 90 business days after the expiry or earlier termination of the PPP agreement. The amount to be guaranteed by the performance bonds shall be equal to the annual minimum rental at effective date and increased every three years by the Consumer Price Index (CPI).

Restaurants & Retail

The PPP agreements for the restaurant and retail operations entail allowing private operators to operate SANParks' existing facilities on the basis of a medium-term operating agreement. Investors manage and upgrade existing retail and restaurant facilities. The agreements enable the private operators to use a defined area over a pre-determined term in return for payment of PPP fees. Funding for the refurbishment of ageing infrastructure is for the private party's account. Against the right of occupation and commercial use of facilities, there are set obligations on the part of the private party regarding financial terms, environmental management, social objectives, empowerment and other factors. Infringement of these requirements carries specified penalties, including termination of the agreement.

The monthly rental payable for the facilities by the private operator to SANParks for any given month shall be the higher of the fixed monthly rental as defined by the agreements, escalating on an annual basis; or the rental based on actual gross revenue realised, expressed as a percentage of gross revenue.

The private operator provides SANParks with performance bonds, equivalent to the annual minimum rental at effective date and increased every three years by CPI, which secure the operator's performance under the PPP agreement.

Activities

The PPP agreements for activity operations entail allowing private operators to introduce and operate the proposed activities on the basis of a short to medium-term operating agreement. The agreements enable the private operators to use a defined area over a pre-determined term in return for payment of PPP fees. Funding for the activity-related infrastructure is for the private party's account. Against the right of commercial operation of activities in national parks, there are set obligations on the part of the private party regarding financial terms, environmental management, social objectives, empowerment and other factors. Infringement of these requirements carries specified penalties, including termination of the agreement.

The monthly rental payable for the facilities by the private operator to SANParks for any given month shall be the higher of the fixed monthly rental as defined by the agreements, escalating on an annual basis; or the rental based on actual gross revenue realised, expressed as a percentage of gross revenue.

The private operator provides SANParks with performance bonds, equivalent to the annual minimum rental at effective date and increased every three years by CPI, which secure the operator's performance under the PPP agreement.

Process

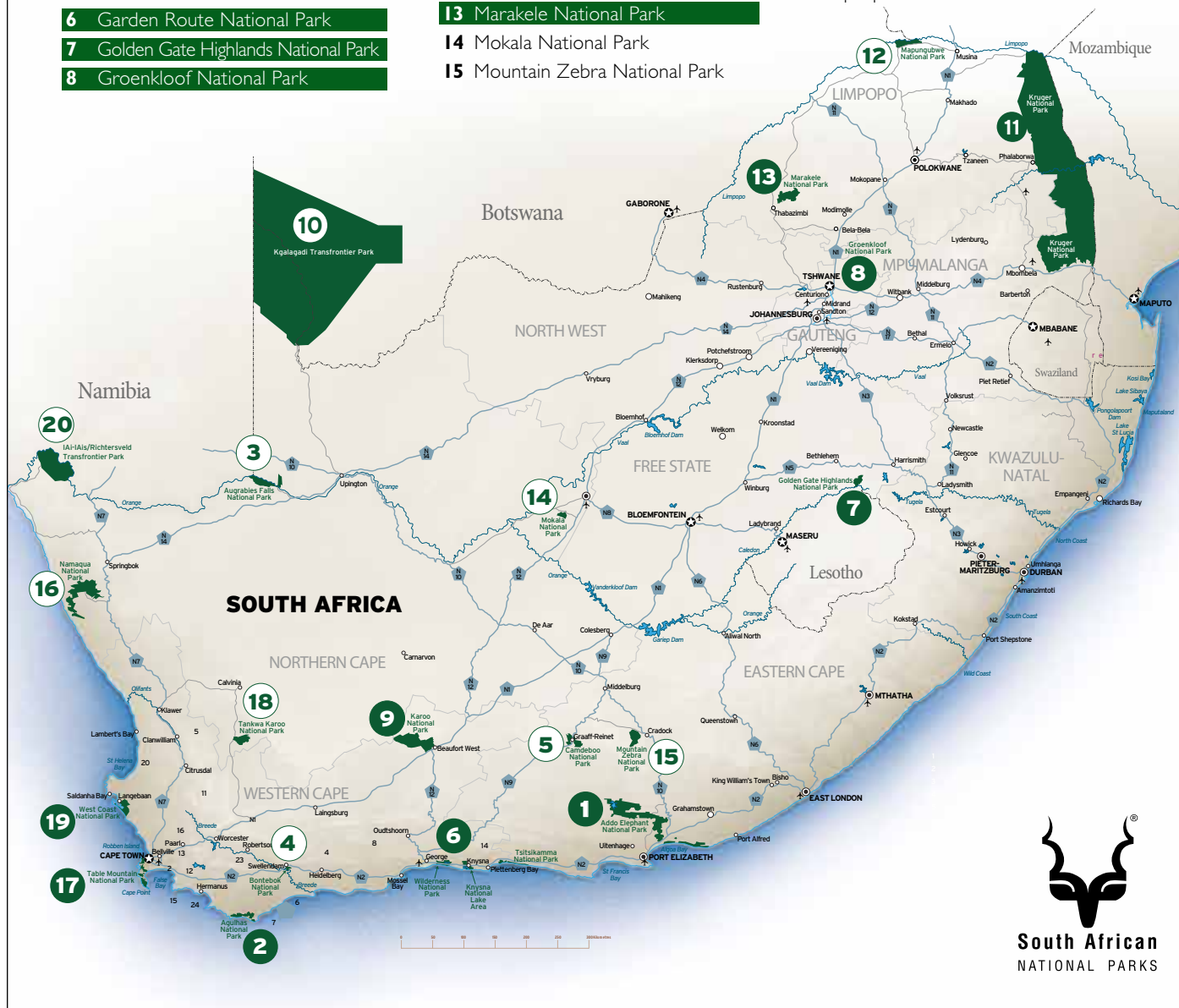
Private party operators interested in any of these opportunities should register their interest by e-mail to SANParks.

SANParks does not provide any warranty that these projects will be embarked on. Unsolicited bids are welcome. Subject to SANParks' capacity, transparent public tender processes will be embarked on to solicit bids from private party operators. SANParks is bound by a number of statutes with relevance to environmental management of parks, including the National Environmental Management Act, 107 of 1998 (NEMA) and the National Environmental Management: Protected Areas Act 57 of 2003 (NEMPAA). Authorisation of any development in a protected area is governed by NEMA and NEMPAA and its regulations. The private party will be responsible for obtaining the required environmental authorisations at their own cost and risk.

- 1 Addo Elephant National Park
- 2 Agulhas National Park
- 3 Augrabies Falls National Park
- 4 Bontebok National Park
- 5 Camdeboo National Park
- 6 Garden Route National Park
- 7 Golden Gate Highlands National Park
- 8 Groenkloof National Park

- 9 Karoo National Park
- 10 Kgalagadi Transfrontier Park
- 11 Kruger National Park
- 12 Mapungubwe National Park and World Heritage Site
- 13 Marakele National Park
- 14 Mokala National Park
- 15 Mountain Zebra National Park

- 16 Namaqua National Park
- 17 Table Mountain National Park
- 18 Tankwa Karoo National Park
- 19 West Coast National Park
- 20 |Ai-|Ais/Richtersveld National Park



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