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Linking State-owned Nature-based Tourism Assets for Local Small Enterprise Development in South Africa

Abstract. Tourism is often discussed as a pathway to local economic development especially in the Global South. Although much discussion surrounds upliftment via job creation and the direct income generated from tourism enterprises, there is increasing focus on the benefits of tourism supply chains for local communities. Existing research demonstrates the potential role of tourism supply chains to uplift local businesses, particularly small medium and micro-enterprises (SMMEs). Nevertheless, there are many barriers which face local SMMEs in accessing tourism supply chains particularly in the Global South. This can create conflict between these assets and local communities. This paper seeks to investigate the relationship between a major state-owned tourism asset in South Africa, the Addo Elephant National Park, and SMME development in the surrounding communities. Using qualitative interviews with stakeholders within the Addo Elephant National Park, local tourism businesses as well as local SMMEs, the challenges faced by these enterprises in entering the tourism supply chain are highlighted as well as the tenuous linkages between local SMMEs and state-owned tourism assets. The data provides important insight into the disconnect between local small enterprise development and public procurement processes within the South African tourism sector.

Keywords: state assets; nature-based tourism, South Africa, supply chains, procurement, SMMEs

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1. Introduction

Among others, Booyens (2022, p. 197) points out that since the 1990s “tourism has found wider recognition as an economic sector with development potential, particularly in relation to maximising the benefits of tourism for host communities”. In the resource-constrained environments of the Global South tourism often

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is propagated as an opportunity for local community upliftment and enhancing the prospects for local economic development (Rogerson & Saarinen, 2018; Adu-Ampong & Kimbu, 2020; Rogerson, 2020; Saarinen & Rogerson, 2021). In addition, it can increase empowerment, broaden skills and develop an understanding and appreciation of tourism assets. This is especially the case in South Africa where many significant tourism assets are situated in poor rural areas, most especially of assets concerning nature-based tourism (Chidakel, Eb & Child, 2020; Giddy, Rogerson & Rogerson, 2022).

Although the tourism sector assumes an important role in the South African economy there are major challenges related to local economic development and a lack of significant upliftment of local communities surrounding large tourism assets (Giddy & Rogerson, 2021). The primary way by which tourism benefits local communities, particularly state-owned tourism assets, is in the form of job creation rather than through backward linkages for the provision of tourism products and services which can generate significant opportunities for business development within local communities as well as social upliftment and minimizing conflicts between the tourism economy and local residents (Rogerson, 2014; Adiyia et al., 2017; Chidakel, Eb & Child, 2020; Booyens, 2022, Burton & Rogerson, 2023). This has precipitated disappointment and (sometimes) conflict between local communities and the large state-owned assets located in rural communities as communities do not feel that they significantly benefit from these assets (Spenceley & Goodwin, 2007; Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Rylance & Spenceley, 2013). As highlighted by Abdullah, Lee & Carr (2023) the uneven benefits from tourism development between different actors in destinations relates to issues of marginalisation. In South Africa, one of the channels demonstrated to address marginality and promote improved economic development prospects within rural communities is support for the development of local small medium and micro enterprises (SMMEs) which emerged as a core policy focus of government in the post-apartheid period (Kirsten & Rogerson, 2002; Rogerson, 2004; Giddy, Idahosa & Rogerson, 2020; Sixaba & Rogerson, 2023).

The objective in this article is to examine SMME development linked to tourism and in this case specifically to a large, state-owned nature-based tourism asset in South Africa. The case of Addo Elephant National Park (AENP) makes an interesting and unique context within which to study these dynamics for a number of reasons. First, it is one of several protected areas which are under the authority of South African National Parks (SANParks), a large (state-run organization) parastatal organization for conservation and tourism development which oversees the management of national parks in the country. Second, the park is located within the Eastern Cape Province, South Africa's poorest province which has promoted

tourism as a significant economic sector for development (Giddy & Webb, 2016; Acha-Anyi, 2020). The research seeks to investigate two components of SMME development in relation to the AENP, namely maximising the state asset for the direct engagement of local SMMEs involved in tourism and the maximisation of the asset for the indirect engagement of local SMMEs through tourism supply chains. The leveraging of public procurement as a basis for catalysing SMME development is a central theme in this research as the South African state has sought to apply public procurement as a vehicle to achieve its broad objectives of addressing poverty and inherited inequalities from the apartheid period (Rogerson & Rogerson, 2019). It can also enhance understanding and appreciation of tourism assets, which is of particular importance in large nature-based tourism assets such as AENP, which are crucial for conservation initiatives. For the tourism sector the application of public procurement is viewed a tool for achieving government's objective of creating an inclusive tourism economy (Rogerson & Rogerson, 2019).

2. Wildlife and National Park Tourism in South Africa

Nature-based tourism is arguably the most significant leisure tourism sub-sector in South Africa (Spenceley, 2005; Saayman & Saayman, 2006a; Rylance & Spenceley, 2013). South Africa boasts dramatic and varied natural assets which lend themselves to the development of a wide range of nature-based activities (Saayman & Saayman, 2006b; Tichaawa & Lekgau, 2020). Two of the most visited attractions in South Africa are found within its National Parks system, namely Table Mountain National Park and Kruger National Park, the latter of which accounts for the vast majority of the SANParks budget (Saayman & Saayman, 2006a). Much of the tourism occurring within SANParks is linked to wildlife viewing, due to the wide variety of unique animals which make South Africa one of the most prominent destinations in the world for wildlife tourism (Rogerson & Rogerson, 2018).

A considerable amount of research has been undertaken on wildlife tourism in South Africa, albeit largely focused on the Kruger National Park. Most studies have been conducted by conservation scholars, tourism economists or tourism geographers. These studies have examined variously the motivations, experiences and perceptions of visitors to the Kruger National Park (Saayman & Slabbert, 2004; Saayman & Saayman, 2006b). It has been shown that the majority of visitors to the park are white South Africans or international tourists. As shown by Butler and Richardson (2013) historically only limited engagement has occurred by Black South Africans with nature-based tourism assets such as Kruger National

Park. Other research around nature-tourism assets shows a profile of visitors who are primarily motivated by wildlife experiences as well as domestic tourists motivated by nostalgic components of the experience and that they prefer to self-drive rather than go on guided game drives (van der Merwe & Saayman, 2008; Ferreira & Harmse, 2014).

Another vibrant focus of research has been on the impacts and linkages between nature-tourism assets and local communities (Tapela & Omara-Ojungu, 1999; Anthony, 2007; Tapela, Maluleke & Mavhunga, 2007; Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Rylance & Spenceley, 2013; Tichaawa & Lekgau, 2020). This body of research has shown varied results, though the majority indicates that despite widely publicized community outreach programmes, most local residents have little connection to, knowledge of or positive association with the Kruger National Park (Anthony, 2007). Thus, despite the government rhetoric of 'transformation' and of the community initiatives propagated by park management, there is still a major gap between local communities and the park as a vital tourism asset (Anthony, 2007; Tapela & Omara-Ojungu, 1999). From studies conducted in several communities adjacent to Kruger National Park, it is disclosed that most do not feel there is any direct benefit of the park. This situation perpetuates apartheid-era perceptions of the park among local community members as 'white' recreational spaces with little to no benefit flowing to local communities (Strickland-Munro, Moore & Freitag-Ronaldson, 2010; Butler & Richardson, 2013). Accordingly, despite the significant revenue which is generated by wildlife tourism in South Africa, major shortfalls exist in the linkages between local communities adjacent to the parks and the parks themselves. Previous research has shown that the most significant economic benefit of the communities located adjacent to national parks is job creation (Anthony, 2007). One recent investigation examining the role of SMMES surrounding Pilanesberg National Park demonstrated that there were few instances in which local businesses were able to feed into lucrative tourism supply chains, notwithstanding a range of local SMMES in the area surrounding this park (Giddy, Idahosa & Rogerson, 2020). Thus, despite rhetoric from organizations and, particularly, government, which emphasizes the imperative to uplift local communities via these tourism assets, little has been achieved to facilitate utilizing local business goods and services in these parks. As a result, the economic benefits to local communities are minimal and often precarious (Giddy, Idahosa & Rogerson, 2020).

3. The Case Study Area and Research Methods

As documented by Reardon (2021) more than a century ago elephants in the Eastern Cape were systematically hunted almost to the point of extinction. Skotnes-Brown (2021) traces the origins of the Addo Elephant National Park (AENP) and the area’s chequered history from the beginning of the twentieth century. This included initiatives in the 1910s for domesticating the elephants drawing upon the expertise of Indian mahouts, to campaigns in 1919 to eliminate the elephant population because farmers viewed them negatively for eating and destroying crops and finally towards fledgling initiatives for conservation and protection in the 1920s (Skotnes-Brown, 2021). Competition over land between local commercial farmers and the conservation of elephants continued until into the 1950s (Jones, 2020).

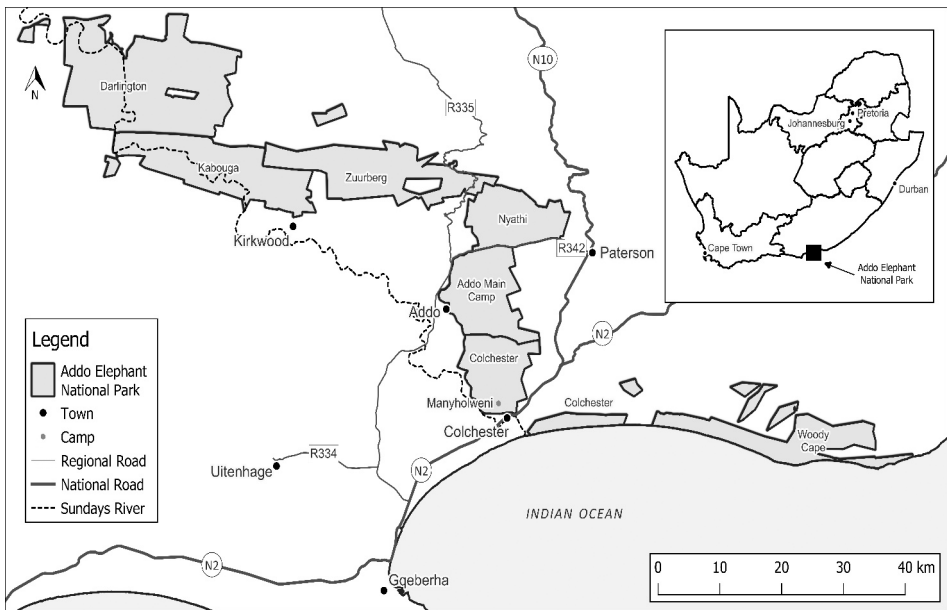


Figure 1: Location map of Addo Elephant National Park
Source: Authors

The National Park was first established in 1931 with humble beginnings when a small parcel of land (only some 2,237 ha) was set aside as a protected area for the rapidly declining African elephant population (Whitehouse & Hall-Martin, 2000). The park is situated near the Sundays River in the region of the Eastern Cape of South Africa (see Figure 1). Historically, it was created to protect the small herd of 11 elephants native to the area. The first visitors to AENP were not allowed

within the elephant enclosures and instead the elephants were lured to the fences where visitors could see them from dedicated viewing points outside of the fences (Brett, 2019). By 1954 the land was enclosed and Africa's first elephant-proof fence was erected in order to allow for more interaction with the elephants which significantly increased tourism opportunities within the park (Brett, 2019; Jones, 2020).

The park was expanded in 1961 and again in 1989, in part to accommodate the growing elephant populations (SANParks, 2015). The elephant population has since grown from only 11 to 650, the densest concentration of wild elephants anywhere on the planet, thus gaining worldwide recognition (Reardon, 2021). Although elephants remain undoubtedly the park's top tourism drawcard, the past few decades have seen the emphasis shift from protecting a single species to conserving five biomes and the many different wild animals that occupy them (Brett, 2019; Reardon, 2021). In 1997 it was proposed that the park be expanded to encompass other protected land in the region. This resulted in the incorporation of the Darlington, Zuurberg and Woody Cape sections of the park (SANParks, 2015). In 2008, the islands of St. Croix and Bird Island were also incorporated and established as a marine protected area (SANParks, 2015). Further, aside from animal introductions in the main section of the park, SANParks during the past 20 years has slowly introduced large game into other sections of the park (Brett, 2019). Other animal species in the park include a variety of antelope species and the unique flightless dung beetle which is found almost exclusively in Addo. The park is also home to a vast variety of bird species (SANParks, 2019)

The Addo Elephant National Park is unique as it is one of the few national parks in the world that offers the 'big 7' — elephant, rhino, black rhino, buffalo, leopard, the great white shark and seasonal southern right whales (Saayman & Saayman, 2009). In extent AENP currently is 1,640 sq. km making it the third largest national park in South Africa (SANParks, 2019). The AENP represents one of the most ecologically diverse protected spaces in South Africa (Reardon, 2021). Visitor numbers have increased significantly over the years, with a peak in the 2017/2018 fiscal year at 305,510 visitors (SANParks, 2018). This total represents a major increase in arrivals from early recorded visitor numbers of 37,512 in 1975 (Brett, 2019). During the COVID-19 pandemic there was a significant decrease in visitor numbers albeit numbers are slowly starting to increase again benefitting from changing consumer travel preferences in South Africa which include a search for open and natural spaces (Rogerson & Rogerson, 2021a, 2022a, 2022b).

Despite the growth of tourism research on National Parks in South Africa, only limited investigations have been conducted on AENP and few studies explore the tourism dynamics in the park. One previous investigation demonstrated that the primary purpose of visitors to the park, unsurprisingly, was wildlife-viewing

(Boshoff et al., 2007). The demographics of visitors were also found relatively homogenous with mostly a cohort of international tourists and white South African visitors (Kruger & Saayman, 2015). The only published study which has interrogated aspects of the park's local impacts is that by Fezeka and Stella (2020). This research highlighted the marginalisation and lack of benefits from the park for Black Africans resident in local rural communities neighbouring the park. Of note is that these authors signalled the limits for local entrepreneurs and that local communities "are still heavily marginalized in terms of business opportunities in the park" (Fezeka & Stella, 2020, p. 16). No previous research studies have been conducted, however, on the opportunities and challenges for local SMME development related to AENP, which is the central focus of this investigation.

A qualitative research approach was adopted for data collection in this study. Semi-structured interviews were used for all data collection with different interview guides developed and adapted based on the specifics of the interviewees. Data collection targeted those involved in and responsible for procurement within the park as well as owners or managers of local SMMEs in surrounding towns which could fit the tourism supply chain. Interviews with key stakeholders within the park included both SANParks employees, most notably the park director, the procurement manager, tourism and hospitality managers as well as managers of relevant concessions within the park. Interviews were conducted with tourism-related business owners as well as business owners who could potentially feed into the tourism supply chain. Finally, an interview was conducted with the chair of the Addo Tourism Association, a local tourism business chamber.

The interviews with AENP staff and facilities within the park sought to elicit information on their procurement policies, interactions with local SMMEs as well as the enterprises in their supply chains. Insight into why these companies are selected, the characteristics companies look for in suppliers and some of the challenges faced in the procurement process was also included. In the interviews with specific facilities, we sought to gain insight into the amount of flexibility and concessions given to these direct managers in terms of the procurement of the specific goods and services. In terms of interviews with local SMMEs, the focus was on their linkages with AENP, particularly the opportunities and challenges associated with engagement with SANParks and AENP. A total of 29 interviews were conducted in the surrounding towns to AENP, mostly at Kirkwood and the town of Addo, and targeted at tourism businesses and other enterprises related to the supply chain of the park.

The data collected through the interview process was analysed using a thematic content analysis. Relevant themes were extracted from the data, based on the questions and the various responses of participants. Some data was quantified

with relevant and quotations extracted where they provided unique insight and/or adequately summarized a series of responses. In the discussion below direct responses from interviewees are identified by their job function as park manager (PKM), procurement manager (PM), hospitality manager (HM) and camp duty manager (DM). In addition, responses are given from certain private sector interviews with accommodation providers (A) service providers (S) and an independent enterprise (E).

4. Results and Discussion

At the outset, in contextualising the research findings it is essential to recognise that the AENP is located in close proximity to Nelson Mandela Bay Metropolitan Area and the city of Gqeberha, formerly called Port Elizabeth (or PE abbreviated). The main park entrance, which is found at the Addo Main Camp, is approximately 70 kilometres from Gqeberha. Within the park SANParks offers a range of accommodation facilities to visitors at several rest camps as well as opportunities for camping, 4 x 4 tours, birding and hiking. In addition, within the park are several (white-run) concessionaires which operate or manage various facilities. In terms of local SMME development in neighbouring towns opportunities exist both for tourism businesses, especially those providing accommodation services or activities such as tour guiding, and for involvement in the supply chain of the park's activities and enterprises.

The findings are presented in terms of three themes. These relate to (1) the character of the SMME economy in the Greater Addo area; (2) understanding the limits of SANParks use of public procurement, its challenges and the agency's targeted initiatives to expand the engagement of local SMMEs, and, (3) the minimal opportunities for local SMME development in relation to supply chains of private sector businesses which operate in the park.

4.1. The SMME Economy of the Greater Addo Area

The economy of the neighbouring small-town localities surrounding AENP needs to be understood as it is in these localities where potential local SMMEs would be found. The area surrounding the park, known as the Greater Addo area, includes the four small towns of Addo, Kirkwood, Colchester and Paterson. Kirkwood is the largest and most developed of these small towns and a centre which serves the farming communities throughout this region. The town of Addo houses many

residents who work in the area's prosperous farming and tourism sectors. The small village of Colchester situated on the Sundays River, consists of middle-income residents, many second homes and a cluster of tourism accommodation facilities. The village of Paterson is very small and with few businesses (Fezeka & Stella, 2020).

Of the 29 interviews conducted in the Greater Addo area the majority were with accommodation service providers. Businesses had been operating for between 2 and 27 years with a range in terms of size with operations as small as two people (both owners) and one enterprise which had up to 80 employees. It was observed that overwhelmingly the accommodation service sector in small towns surrounding the park was dominated by white-owned businesses. This finding concerning the racial complexion of tourism enterprises confirms that of other studies undertaken of tourism in small towns and rural areas of South Africa which are situated in former apartheid designated 'white' space rather than in the former Black Homelands (Donaldson, 2018, 2021; Rogerson & Rogerson, 2021b; Rogerson & Sixaba, 2021). Addressing this historical legacy of apartheid upon structuring the patterns of contemporary tourism ownership in South Africa lies at the heart of national government policies for transformation and the promotion of initiatives for local SMME development and especially by Black-owned enterprises (Sixaba & Rogerson, 2023).

The white-owned accommodation and activities companies in the Greater Addo area form part of typical tourism product offerings in a destination. Local businesses in tourism were involved in accommodation supply in the form of small guest houses or bed and breakfasts. It was observed that relative to the situation which exists in other parts of South Africa with similar large state-owned tourism assets, such as Kruger National Park and Pilanesberg National Park, the number of businesses that offered activities was relatively low (Giddy, Idahosa & Rogerson, 2020; Giddy & Rogerson, 2021). Only a handful of such activities were identified mostly relating to provision of game drives into the AENP which are permitted as businesses have operating permits to take visitors on game drives into the park.

In terms of accommodation suppliers an important segment were small accommodation offerings which were operating on properties with other businesses. Most of these properties, it was determined, were functional and operating farms, in particular citrus farms. Several respondents mentioned statements such as "The only tourism establishment, have other non-tourism businesses in PE, have a citrus farm that is mainly for exports" (A4). Accordingly, for many of these accommodation businesses in the surrounds of AENP the tourism business was a side project and/or supplemental income to more lucrative large-scale farming operations. This means that the dynamics of local tourism businesses in the surrounds of Addo Elephant National Park is different to that of other rural tourism destinations sur-

rounding national parks in South Africa. The interviews conducted with tourism SMME owners and managers disclosed the role of the park as an asset which attracts visitors. Most stated that their primary purpose is to offer accommodation for those coming to the area to visit the park. The majority stated clearly that the only reason any tourism businesses have emerged in these surrounding towns of Greater Addo is because of the park: “It is the main reason for tourism businesses in the area. If there was no park, there would be no guesthouses in the area” (A14). This said, the linkages between these tourism SMMES and the AENP were minimal. The owner of one of the activities companies highlighted the existence of a strained relationship with SANParks: “I have encountered communication challenges. We never get any response or reply from the park. They never avail themselves when there is a stakeholder meeting, which makes things difficult as the park is the life-line of tourism in the area” (A1).

Beyond the accommodation providers several other businesses operating in the neighbouring towns of Addo, Kirkwood and Colchester are potential suppliers for services such as security, construction, transport, printing and auto repair/electrician. The interviews disclosed a variety of experiences in terms of their relationships with the park. Some of the white-owned businesses have provided services to the park and are registered on the park’s supplier database. One business owner indicated policy changes had negatively impacted the business and that previous contracts with the park were not renewed: “I have worked, for a period of 12 years, unfortunately the contract ended as I am white and do not fall under the Black Economic Empowerment groups” (S4). Other businesses, however, considered they could not effectively offer services to the park stating: “I don’t think my business is at that level” (S3) or that their business was unregistered and informal therefore could not qualify as a potential supplier. The park engages with the community of local SMMES through the Addo Tourism Association, which is a local network of tourism businesses which operate in the Greater Addo area. This association conceded an improvement in communication and relationships with park management. It was disclosed that a major challenge of local SMMES in engaging with SANParks relates to their procurement and payment processes.

4.2. Procurement Procedures within Addo Elephant National Park

The procurement procedures within the AENP must adhere to national SANParks policies which are restrictive. As a public entity SANParks operations are governed by the Public Finance Management Act of 1999 which is committed to support national government objectives for ‘transformation’ of South African society in the post-apartheid period. The procurement policy introduced a set of preferences that

must be considered in evaluating tender bids. The key preferences relate to government objectives for Black Economic Empowerment and upliftment of enterprises owned by Black South Africans. Another critical aspect of policy is the requirement that any potential business interested in supplying to SANParks must be registered on a national government central supplier data base (SANParks, 2022).

The park manager explained that SANParks has enacted policies recently in response to concerns about nepotism and corruption over the award of tenders through the public procurement system. As a consequence, the procedures for procurement have grown increasingly strict: “There is lots of paperwork. SANParks has made it stricter but not easier. Everything is more regulated, and there’s even more paperwork as the cost increases” (PKM). This said, there is only one procurement manager to oversee processes for four different national parks, namely Camdeboo National Park, Mountain Zebra National Park, Karoo National Park and AENP. This sole manager is responsible for approval of all procurement needs for all departments. It was revealed that the procurement system has become decentralized whereas formerly procurement was sent to the SANParks head office for approval. This decentralization of procurement has meant that the entire weight of the procurement process falls on one individual for all four national parks in the region.

In terms of SANParks policy, according to the procurement manager, there is no specific policy mandate to prioritize local business or SMMES. Nevertheless, it was pointed out there are few established providers because the procurement process is tedious and enterprises are negatively impacted by consistent late payment issues by government. The majority of their suppliers of goods and services for AENP come from the metropolitan centre of Gqeberha rather than local enterprises in the immediate environments of the park. Theoretically, the procurement procedure is to seek out local suppliers in the immediate area and only then move to source from Gqeberha. The issue was stressed of the lack of suppliers for the goods and services needed in the immediate area. In terms of the links with local tourism businesses, the AENP park manager noted that the park does not currently have a limit on the number of operators which are given traversing rights thus allowing access from a variety of operators. However, the park has strict regulations and relatively high fees for operators wishing to conduct game drives in open-air vehicles.

All SANParks managers interviewed for this research pinpointed numerous difficulties in terms of procurement. The park manager said “We’re trying to overhaul the process. We need to study procurement process because this isn’t working” (PKM). A critical issue was the lack of staffing within the finance and procurement office with just one individual responsible for procurement across four different national parks. In some cases, for larger procurement requirements this single manager is required also to source quotations which can create a major backlog

of procurement requests. As such a large operation, AENP has numerous daily procurement needs which means that the responsibility for sourcing quotations and completing essential paperwork related to procurement falls increasingly on the end-user: "End-users are not happy because this process is so difficult. The finalization of any procurement is increasingly difficult... It takes up way too much of their time. It keeps them from their actual job" (PKM). This creates the issue of many staff members spending the majority of their time completing paperwork related to procurement rather than fulfilling the primary duties of their position. Nearly everyone interviewed within the park noted this as a major problem. The procurement manager observed that the policies and procedures can become incapacitating to the end-user, preventing them from doing their jobs and running an effective conservation area and tourism product. In response to this issue, the park manager has moved to a solution of drawing up longer-term larger tenders for some of the contractors they require on a regular basis. This means for example that a single maintenance company would be awarded a three-year tender to service all the daily maintenance issues required by the park. Although the process takes longer, in the end it saves time when daily issues arise regarding specific goods and services required frequently by the park. This said, one important implication is that it reduces the ability for local SMMES to feed into this supply chain which becomes even more difficult due to the requirements for obtaining long term tenders.

Another important challenge mentioned by the procurement manager of the park was the issue of the way that government contracts work. It was stated that "businesses don't want to work with government because of the bureaucracy involved" (PM). In addition, the challenge was flagged that government provides no upfront deposit and has a waiting period of 30–90 days to render payment once the service has been completed. It was highlighted that in many cases it takes even longer for payments to be made. One example was given of a construction project: "It's been four months since the services were rendered and they still haven't been paid" (PM). The particular limits on local small enterprise development were made clear: "There is an issue with locals not having supplies, locals don't have the capacity to take big tenders, they don't have the financial means" (PM). This has major implications for the ability of SMMES to opt for contracts with AENP, as it would mean significant upfront capital is required to complete projects both for materials and for labour. Put simply: "A business needs upfront capital to be able to serve SANParks" (PM). Therefore, the procurement manager noted that many local businesses choose to work with other businesses in the private sector which is more efficient in making payments rather than work with agencies of national government.

The expansion of the involvement of local SMMES was a critical theme that was under scrutiny. It was revealed that whilst many park managers flagged the need

to involve local SMMEs in the supply chain as a whole there is minimal involvement particularly from businesses in the surrounds of the AENP. As indicated this is largely explained by geography. The close proximity of a major metropolitan hub is such that the majority of the so-termed 'local goods' and services utilized by the park and its facilities are sourced from suppliers in Gqeberha. One of the primary difficulties mentioned by all managers was the lack of local SMMEs in the surrounding small towns which could directly serve the park supply chain. "There are hardly any established providers [in the local area]" (PM). Further, in marked contrast to the situation in other nature tourism assets managed by SANParks there is no local cluster of informal craft sellers or producers adjacent to or in the vicinity of the park. This means that the local procurement of small-scale craft goods for tourist souvenirs proves difficult. By contrast to the situation at AENP an informal economy of craft sellers and producers exists and is well-documented around several other National Parks, most notably in the surrounds of Kruger National Park (Wessels & Douglas, 2022).

The procurement manager revealed a suite of additional challenges for utilizing local SMMEs. It was stated that SANParks have attempted to distribute fliers or advertise services needed by AENP on social media but often with no response. In addition, the capacity and reliability of local service providers was highlighted as problematic. In cases where efforts had been made to source from a local service provider often the services either were not provided on time or failed to meet the necessary standard requirements: "Many of the businesses are non-compliant so they can't even be registered on our system. There is also an issue with the quality of products we have tried to source locally" (PM). The hospitality manager provided details of a specific example: "We actually had a contract with a local Black SMME to supply guest amenities. When they arrived the bottles of shampoo and stuff were empty or half empty. It turns out they had a fake address and changed their phone numbers so we couldn't even fix the situation" (HM). In such situations, the entire procurement process, already lengthy and tedious, becomes even more delayed. The camp duty manager from the local community provided additional insight around the lack of capacity and reliability of local suppliers. It was observed "There are issues with access with many of the communities. There are very few links between the Kirkwood community and the park because of lack of transportation routes" (DM). The procurement manager echoed this sentiment: "There is this mentality of starting small businesses but there are so many challenges. There is no urgency and a lack of capital in the first years, people need to be persistent" (PM).

SANParks at Addo have initiated small support programmes to assist the development of local SMMEs from communities disadvantaged under apartheid. The park has established two initiatives in which local SMMEs were developed to assist

with services for the park's tourism maintenance with claims that: "The project has been successful" (HM). The first is a contract given for laundry services; the second a contract for the cleaning and maintenance of ablutions. The hospitality manager at the park stated as follows: "The ablutions are now so clean. It's been really positive. We haven't had any major problems" (HM). The process involved the park purchasing supplies and equipment and therefore "We only source out manpower through a local contractor who brings labour into the park" (HM). It should be noted, however, that these are only one-year contracts with the hospitality manager reasoning "To provide new opportunities we try to contract out different businesses" (HM). Two issues emerge with this programme. The first is that, since the park is only contracting out the labour, once the contract expires, the business owners do not necessarily emerge with a stable business that can continue outside of the park since they are not left with any equipment. Furthermore, with contracts only lasting one year, it would be hard for a business to develop significantly to turn enough profit to continue the enterprise going forward.

Another local SMME support initiative is that the park established a unique offering called a "Hop-On Guide" service. This allows visitors to the park to hire a trained guide to guide visitors around the park in their own vehicles. The purpose of this project is both to offer an affordable option for visitors who would like more information while touring the park and a mechanism for economic upliftment for the local community. The park assisted in training a total of six "Hop-on" guides, all of whom were from the adjacent Addo community. Although initially successful, only one of the six trained guides continues to offer the service. The duty manager noted that the reason behind the other guides dropping out was a lack of sufficient business in the early stages of the programme. Although qualified, none of the other trained guides have remained in the tourism sector but the single guide who still offers the hop-on service is successful and often fully booked in advance. A leading channel for local SMME development through the AENP has been in the conservation sector. The park has assisted in the creation of SMMEs directly related to conservation. One of the most successful programmes concerns water quality management and trains members of the local communities in assist with water quality testing throughout the park.

4.3. Private Sector Supply Chains and Procurement in Addo Elephant National Park

Although the majority of facilities operating within AENP are managed by SANParks, there are private companies which manage certain facilities within the park and were given concession rights through a tender process. Concessions have been

given to two enterprises which operate luxury camps within the boundaries of the park. Other facilities include a curio shop and restaurant which have been outsourced and privately managed by large national corporations. These facilities were created entirely for the respective purposes by these private operators. As stressed by Fezeka and Stella (2020, p. 10) despite government commitments for the economic empowerment of disadvantaged communities almost all the concessions belong “to white owners from outside the area”. This includes concessions for the restaurant, lodges, guided game drives and a craft shop. The supply chains of these private concessionaires offer a potential opportunity for local SMME development and were investigated.

Two private luxury game lodges are located within the boundaries of the Addo Elephant National Park. One interviewed lodge offers all-inclusive 5-star luxury accommodation in the AENP. It has been operating for 19 years, opening in 2000, it obtained a long-term lease (40 years) and the right to build and operate this facility within the park boundaries on a 5000 hectare property. The manager of the lodge stated they have a good working relationship with the park. The lodge is required to undergo a quarterly audit by government, must adhere to a SANParks code of conduct and divulge information on their suppliers to SANParks. However, since it is privately operated their actual procurement process is completely independent of AENP and SANParks which therefore have no influence on their selection of suppliers. The majority of their goods are obtained from a large national corporation, due to the price quality and effective delivery standards. The manager stated that they have tried to obtain locally sourced goods, particularly craft, but there is a significant lack of availability in the local area. The manager said “There is just a lack of suppliers in the immediate area. We mostly source from PE [Gqeberha]” (A6). As is the case with many remote nature tourism lodges the majority of their services are in-sourced (see Rylance & Spenceley, 2013) and use of local suppliers is limited to laundry and security which are to enterprises in the Greater Addo Area. In addition, the enterprise outsources the transport of guests to a company based in Gqeberha. For major construction projects the lodge tried to use local providers, including contracting local construction workers but like the park have struggled with non-availability.

The restaurant in the Addo Main Camp has been under the management of a national chain restaurant which operates restaurants in three national parks. According to the restaurant manager, they have a working relationship with the AENP, which includes the need to adhere to a certain code of conduct and provide a list of suppliers, as is the case with the private lodges. In addition, due to its location within the main camp, the restaurant must adhere to specific environmental regulations including the use of biodegradable materials for all containers and straws and

implementing water-saving and energy-saving measures. The restaurant must also source a minimum of 80% of its staff from the local area. Procurement, however, is primarily done in accordance with the procurement procedures for the chain, nationally. Due to the franchise standards, there is little flexibility on the behalf of the individual manager to select alternative suppliers. The only product which is supplied from the local area is bread from a local bakery. In addition, one of the staff members has begun supplying a laundry service to earn additional income. The souvenir shop and has some provisions for visitors staying in the Addo Main Camp and is managed by a large national corporation. The shop manager noted that the large corporation which manages the shop is responsible for the selection of suppliers. Of significance is the absence of a local creative economy of craft that might be a source of supplies for handcraft goods.

One novel privately owned business in the park is the spa facility. The woman owner realized that there was a gap in the market in terms of spa offerings in the area despite the relatively high visitor numbers. She thus put together a proposal to offer spa treatments to visitors in the Addo Main Camp and presented it to park management: “The park was very interested but they said it had to go through an official tender process. This took three years” (E3). Therefore, a formal tender was advertised to the public for the specific service/facility which had been proposed. She was then required to apply for the tender, though she was the only applicant so it was eventually obtained. The process was tedious and the enterprise’s history provides insight into the tender process within SANParks. Although the owner is now operating a successful business this would not have been possible without supplemental income during the much delayed tender process. Part of her original initiative and motivation for starting the spa, aside from filling a gap in the market, was to train local women in providing spa services. The business now has five full time employees and has built a small facility where the services are offered and their product offerings have expanded since securing the tender in 2018. In addition, the company now offers mobile spa services to other local tourism businesses, most notably local accommodation. Questioned about the use of any local goods or services, the owner tried to source local products but as none are available the supplies are sourced online from South Africa’s commercial heartland of Gauteng.

5. Conclusion

In African research the benefits of enhancing the participation of local communities in tourism supply chains has been demonstrated for several countries (Rogerson, 2014; Adiyia et al., 2017; Rogerson & Saarinen, 2018). In South Africa much policy attention surrounds the potential for building local SMMEs in relation to significant state-owned assets in rural areas. In addition to economic benefits, empowerment, skills development, social capital within communities and in the case of rural tourism assets, enhanced environmental awareness are all of significance. This study sought to investigate the relationship between one large, state-owned tourism asset and local SMMEs. The case study of Addo Elephant National Park reveals the limitations that can arise in programmes that seek to build SMME economies through the leveraging of supply chains.

Maximising the potential of public procurement as a development vehicle was shown to be restricted by time-consuming and tedious bureaucratic processes as well as delayed payments by government to suppliers. These issues severely reduced both the willingness and capacity of local SMMEs to participate in the supply chains of state assets. Further limiting the impact of supply chain development is the weakness of the local SMME economy to supply required goods and services to meet required standards of quality and reliable delivery. One significant cause for the lack of small business development in the area is the ability of AENP and other tourism assets to obtain goods from the major economic hub of Gqeberha which is in relative close proximity. Accordingly, whilst Addo Elephant National Park is considered a 'rural' destination the area's geographic proximity and easy access to Gqeberha allows SANParks and other enterprises adjacent to the park to obtain the majority of their required goods and services from this metropolitan hub. In the case of the rural areas surrounding the AENP a most significant gap relates to the absence of a local economy of creative craft that could supply the market for souvenirs popular by international tourists that visit nature-tourism attractions. This situation was observed as markedly different to that which has been recorded in rural areas neighbouring or proximate to other National Parks in South Africa (Giddy, Idahosa & Rogerson, 2020; Wessels & Douglas, 2022). The cause of this situation is unclear and merits further research particularly in view of the potential for an improved local supply of craft goods to contribute towards the goal of a more inclusive tourism economy.

There are a number of potential interventions which could be considered in order to increase the growth of SMMEs in the Greater Addo Area and also facilitate these SMMEs feeding into the tourism supply chain. One would be to review and overhaul the procurement processes within these assets. Local small business are

unable to even consider entering the supply chain because of issues of inefficiency within the system, the most significant of which is non-payment. Another intervention which could increase the potential for local SMMES to offer goods and services to the park would be to create incentives. This could be in the form of incentivizing public procurement of goods and services to local SMMES, especially for smaller projects. Finally, programmes could be more effectively implemented to facilitate the development of local SMMES which can directly or indirectly serve the tourism sector including upskilling and providing start-up funding, similar to those which have been developed for conservation within these spaces.

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Rola głównego parku narodowego RPA w rozwoju małych przedsiębiorstw położonych w jego sąsiedztwie

Streszczenie. Turystyka jest często postrzegana jako szansa rozwoju gospodarczego dla społeczności lokalnych, szczególnie w krajach globalnego Południa. Chociaż dużo uwagi zwraca się na kwestie takie jak tworzenie nowych miejsc pracy i dochody uzyskiwane przez przedsiębiorstwa turystyczne, coraz większy nacisk kładzie się na korzyści, jakie społeczności lokalne mogą czerpać z uczestnictwa w łańcuchach dostaw sektora turystycznego. Dotychczasowe badania wskazują, że uczestnictwo to może być korzystne dla lokalnych biznesów, zwłaszcza dla małych i średnich przedsiębiorstw (MŚP). Niemniej jednak istnieje wiele barier, jakie firmy z tego sektora napotykają w dostępie do łańcuchów dostaw w branży turystycznej, szczególnie w krajach globalnego Południa. Może to prowadzić do antagonistycznych postaw w społecznościach lokalnych wobec rozwoju turystyki na danym terenie. Celem artykułu jest analiza roli, jaką odgrywa Park Narodowy Addo Elephant, jeden z czołowych aktywności turystycznych w RPA, w rozwoju sektora MŚP w okolicznych społecznościach. Dane uzyskane w wywiadach jakościowych z udziałem przedstawicieli parku, lokalnych przedsiębiorstw turystycznych, a także miejscowych firm sektora MŚP ukazują wyzwania, przed jakimi stoją te firmy, próbując uzyskać dostęp do łańcuchów dostaw branży turystycznej, a także słabe powiązania między tymi firmami a parkiem. Wypowiedzi respondentów pozwalają lepiej zrozumieć rozdźwięk pomiędzy działalnością lokalnych małych przedsiębiorstw a procesami zamówień publicznych w sektorze turystycznym RPA.

Słowa kluczowe: państwowe aktywa turystyczne, turystyka przyrodnicza, RPA, łańcuchy dostaw, zamówienia publiczne, MŚP



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