

The Heritage Park Model: A Partnership Approach to Park Expansion in Poor Rural Areas

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Abstract—The initiative to create a conservation corridor—the Heritage Park—linking the existing 62,000 ha (153,205 acre) Madikwe Game Reserve with the 49,000 ha (121,082 acre) Pilanesberg National Park, to form a 275,000 ha (679,540 acre) nature-based tourism anchor project and primary economic catalyst for a poor rural region, originated in 1999. An innovative park expansion model was required as the land linking the two successful parks belongs to tribal communities (land held in trust by the government for the communities), private landowners, and the state (agricultural land leases to local farmers). A national program of land redistribution, active mineral rights and land claims further complicate land matters. The North West Parks and Tourism Board identified the opportunity, assessed the potential, developed the concept, sold the vision to key stakeholders, partnered with them, and set up an institutional model to facilitate the establishment of the Heritage Park.

Background

Economic pressures for intensified utilization of natural and mineral resources, a lack of awareness and inadequate enforcement of conservation laws is posing a continued and increasing threat to biodiversity conservation in Africa. Within an increased global attempt to marry biodiversity conservation and economic development, the South African scenario is even more daunting, considering its history of racial segregation and in some instances forced removals to accommodate park expansions. Making conservation acceptable to a black, previously deprived and therefore rather suspicious majority is a serious challenge. South

African National Parks (SANParks) recognize that parks can make a significant contribution to rural development (Magome 2003). Magome implies that with only 4 percent of SANParks visitors being from the previously disadvantaged black communities, it is unlikely that the rural communities will outright support the expansion or creation of parks. The most important ingredient for successfully implementing park expansion or establishment models is, however, the creation of awareness and support among politicians, government departments, decision makers, communities and the general public. Relationships have to be built before support can be gained.

An important argument that is put forward (Magome and Fabricius 2004) is that although certain examples exist where the benefits from biodiversity conservation projects exceed the costs to rural communities, it is important to note that generally the benefits that rural communities derive from informal use of natural resources exceed those from formal biodiversity conservation. The Okavango Delta, which yields high tourism activities and therefore economic returns, is quoted as an exception. They further warn against benefits that have a tendency of flowing to beneficiaries outside of the affected communities.

It is now accepted that dialogue and participation is the expected norm in Southern Africa. The most significant factors that affect the success of community wildlife management in Southern Africa are the administrative/institutional capacities, the finances, the social and political environment, and the natural resource/ecological base (Fabricius and others 2001).

Fabricius and others (2001) recommend that facilitators should provide a high-quality, light-touch facilitation. They found that a high percentage of the donor (government) funding can be expected to go towards paying facilitators, community training needs should be carefully determined before training programs are designed and implemented, and advise that community (beneficiary) groupings should be clearly and regularly defined and segmented to facilitate effective communications and negotiations.

While conservationists are grappling with all these socio-political and socio-economic issues that have a direct bearing on biodiversity conservation in Southern Africa, a number of experimental (and successful) models have been tested. These projects are driven by a philosophy of incentive-led conservation that benefits the landholders and therefore the

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land (Child 2004). Child concludes that if we concentrate on enabling park managers and landholders to build on the comparative advantage of wildlife conservation (versus other land use, especially agriculture) and get the bureaucratic impediments out of the way, both conservation and rural development will be served.

The Philosophy of Voluntary Land Incorporation

The philosophy of voluntary land incorporation is not a new one. The voluntary incorporation of land into Protected Areas for economic considerations in South Africa was initiated by private landowners adjoining Protected Areas who recognized the value of nature-based or eco-tourism and the value of established destinations such as Kruger National Park and opted to capitalize on the inherent potentials. When communities negotiated successful land claim settlements for land in Protected Areas, they opted to leave their land inside Protected Areas such as Kruger National Park with the intention of capitalizing on its tourism values.

Madikwe Game Reserve (MGR) was established on state land for economic reasons. The North West Parks and Tourism Board (NWPTB) later developed the necessary legal tools to incorporate neighboring private land into MGR to expand the conservation footprint. Similar models are now also developing elsewhere in South Africa. Examples are the Greater St Lucia Wetland Area, Blyde River Canyon National Park and the Greater Addo National Park.

What is different, however, in the case of the Heritage Park is the economic motivation and the pro-active intervention of the state as a driving force from the outset, combining the proclamation of a Protected Area for economic reasons with voluntary incorporation of private and community land. Unlike the historical South African model of establishing Protected Areas on government land set aside for conservation, the Heritage Park Expansion Model aims to establish a conservation corridor on land that belongs to tribal communities (land held in trust by the government for the communities), private landowners, and the state (agricultural land leases to local farmers). From the onset, competition for the land and territorial challenges between and within stakeholder groups were expected. The state, therefore, facilitates the expansion of Protected Areas on land not under its jurisdiction that was historically used for agriculture. The state can be expected to assist with the funding of infrastructure and game reintroductions.

Heritage Park: A Unique Situation With a Unique Approach

The Heritage Park project is unique in that:

1. The successes of Pilanesberg National Park (PNP) and MGR are the driving force for park expansion. Both PNP and MGR were established on degraded farmland, required large-scale game reintroductions, and are benefiting local rural communities.
2. Undeveloped grazing land is available and offers the opportunity to link the two existing protected areas via a conservation corridor.

3. Its establishment is motivated on socio-economic grounds within a rural setting.

4. Its planning and development is facilitated by government for the benefit of communal and private landowners.

5. The model makes provision for voluntary incorporation of private and communal land to expand existing protected areas.

6. Landowners retain title to the land and are the primary beneficiaries of activities on their land.

7. There is an existing tourism demand.

8. There are complicated land issues in the form of land claims, mining rights, and national land reform policies.

Built on Three Pillars: Partnerships, Conservation, and Cultural Heritage

The Heritage Park Expansion Model is built on three pillars: (1) partnerships, (2) wildlife conservation, and (3) the traditional African way of life and cultural heritage. The NWPTB, as protected area and tourism development and management agent of the North West Province, partnered with private landowners, communities, municipalities, government departments, mining companies, and development agencies to drive the implementation of this exciting project. The Heritage Park Expansion Model will eventually create a Protected Area of one million ha (2,471,054 acres) that is expected to have a significant positive influence on the immediate rural economy, the district, and the province.

Goals

The first goal of the Heritage Park is to help relieve poverty by creating job opportunities and by stimulating a tourism economy. The second goal is to increase the area of conserved natural landscapes and ecosystems in the North West Province. The driving force is the rapidly growing tourism demand in the region.

The Challenge

Achieving the aforementioned goals is rather complex when considering the mix of land ownership and related agendas, comprising:

1. Individually owned private properties.

2. State land held in trust for communities that have traditionally utilized the land for subsistence living.

3. The world's richest platinum belt running through the corridor with mineral prospecting and mining rights held by mining companies.

4. A national program of land redistribution in RSA that aims to reinstate land rights for blacks forcefully removed during the apartheid regime.

5. Land redistribution policies of the national government aimed at black economic empowerment;

6. Lack of sufficient funding to implement the project as government is expecting protected areas to "pay their own way."

7. Insufficient road and municipal service standards with the dangers of stray cattle, donkeys, and goats on the roads despite great advances having been made in the service

delivery of basic needs such as water, electricity, and waste removal.

8. The presence of acute unemployment, AIDS, and related social problems.

Hypotheses Being Tested

By implementing the Heritage Park Expansion Model, the following hypotheses are being tested.

1. In areas of marginal agricultural potential—where adequate critical mass exists between the attractiveness of a wilderness landscape, its tourism potential, and accessibility to markets—the establishment of protected areas could be motivated on socio-economic grounds, where conservation motives on their own may have failed.

2. Over the long term, land use on private or communal land will be determined by socio-economics, although it is expected that the process will be slowed down by cultural considerations and traditional practices.

3. Where land with greater potential for nature-based tourism is held by private or communal landowners, it is possible to have such areas willingly proclaimed as formally Protected Areas, provided that:

a. Capacity, commitment, and perseverance exist within lead agencies to fulfill an ongoing facilitation role;

b. Understanding, support, and participation of key stakeholders and the occupants of the land is obtained through effective dialogue and partnership arrangements; and,

c. Support mechanisms for business partnerships are established and sustained to ensure benefits to local economies.

Solution: A Home Grown Model

It was clear that a new Protected Area establishment model had to be conceptualized and designed by all the stakeholders, through mutual endeavor, if all of these complex issues were to be resolved.

The adaptive establishment model that emerged in broad terms provided for:

1. The establishment of a facilitation capacity;
2. Comprehensive, regular and structured communication, consultation and negotiations between parties;
3. The ongoing creation of awareness and building of capacities; and
4. Allowing the model to develop itself through an evolutionary process of joint conceptualization, design, review and adaptive implementation.

Spatial Orientation and Phasing

The proposed Heritage Park runs in a band that stretches north of Pilanesberg National Park (PNP) before turning west to follow the Dwarsberg mountain range before joining with MGR. In the greater context, the Heritage Park is strategically situated between other Protected Areas in the North West and Limpopo Provinces and can become the catalyst in launching an important regional initiative—potentially crossing the border into Botswana (fig. 1).

The focus in the short term (5 years) is to convert areas immediately adjacent to PNP and MGR from agricultural use to eco-tourism use; in the medium term (15 years) to add the area in between; and in the long term, to eventually link up with a number of other regional projects in the Limpopo Province and to expand into Botswana to form a significant Conservation Area of some one million ha/2.5 million acres (10,000 km²/3,861 mi²).

Anchor Projects

PNP and MGR form the spatial anchor projects from where the Heritage Park will grow.

Pilanesberg National Park (49,000 ha/121,082 acres). Pilanesberg National Park (PNP), an extinct alkaline volcanic site, was proclaimed as a Park in 1979. PNP's special features of rugged landscape, well-watered valleys, and the presence of abundant wildlife have made it a preferred site for human settlement for thousands of years. Prior to its proclamation, the Pilanesberg Complex was degraded and depleted of indigenous game populations due to fairly intense settlement by commercial farmers. At considerable expense, the land was restocked with game, the scars of human settlement were removed, and tourism infrastructure was developed during the first 15 years (1979 to 1993). This constituted the largest and most expensive game stocking and land rehabilitation project ever undertaken in any African game reserve at the time. A 110-km (68-mile) peripheral Big Game fence was erected over some very rugged terrain, 188 km (117 miles) of visitor roads have been developed, and more than 6,000 head of game were introduced during the Operation Genesis game translocation program. Today Pilanesberg attracts more than 500,000 visitors per annum.

The most important studies¹ that have shaped the development of PNP are:

- The ecological report by Willem Van Riet and Ken Tinley (PNP—Planning and Management Proposals, August 1978);
- The internal ecological publication on range conditions and large herbivore carrying capacities by Roger Collinson and Pete Goodman (Inkwe No 1., Environmental Research in Bophutatswana, March 1982);
- The development plan by Willie Boonzaaier, Roger Collinson and Willem Van Riet in 1983 [A Five Year Development Plan for Pilanesberg National Park, September 1983];
- The study on introduction of lion by Deborah and Frank Vorhies (Introducing Lion into Pilanesberg National Park: an Economic Assessment, 1993); and
- The management plan by Willie Boonzaaier and Roger Collinson in 2000 (Pilanesberg National Park Management Plan— Second Edition, 2000).

Madikwe Game Reserve (62,000 ha/153,205 acres). Madikwe Game Reserve (MGR) was proclaimed in 1991, based on a feasibility study that found wildlife conservation and tourism to be a more viable form of land use than

¹ Studies on file: Contour Project Managers CC, Reg. No CK 91/30370/23, PO Box 4906, Rustenburg 0300, South Africa, email: contour@mwweb.co.za.

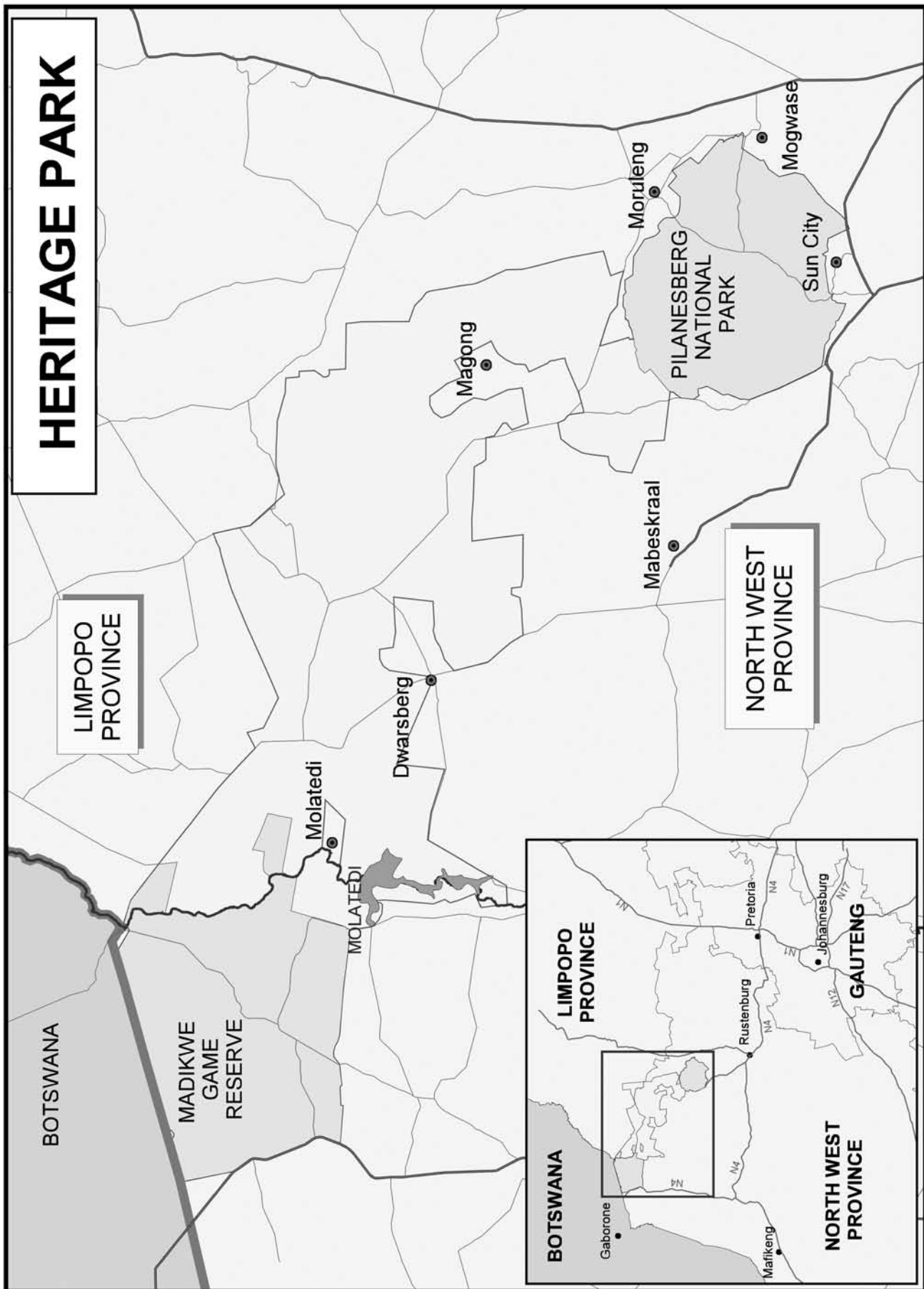


Figure 1—Heritage Park map.

agriculture in this semi-arid bushveld region, on the border with Botswana. The Madikwe Model, where a Protected Area was established to provide financial benefits to poor local communities, was a pioneering project in South Africa. MGR was established on degraded cattle farms. Fourteen years later, MGR has a proven success record as a socio-economic anchor project.

The calculated benefits from MGR over its development phase show an investment of R110 million (U.S. \$15+ million) by government and R224 million (U.S. \$31 million) by the private sector. A wage bill of R67 million (U.S. \$10 million) had been paid out for temporary jobs during this development phase. Compared to 80 agriculture jobs when the land was farmed, 650 direct permanent jobs have now been created in 27 operational luxury lodges. Considering the multiplier effect in the tourism sector, this translates to the creation of more than 2,500 jobs in the greater economy. Currently, the wage bill for permanent employees within the private lodges in Madikwe alone amounts to R90 million (U.S. \$14 million) per annum. A number of small local businesses also benefit through supplying wood, goods, and services to lodges and to park management. Four tourism concessions have been allocated to local communities on a competitive basis. One community lodge is operational, one is currently under construction, and the other two lodges are in the planning phase. The visitor numbers to Madikwe are almost 40,000 per annum.

The most important studies² that have shaped the development of MGR are:

- The development and restocking plan for Madikwe Game Reserve in 1991 by Willie Boonzaaier and Johan Kloppe (Madikwe Reserve Masterplan Proposals, April 1991);
- The regional plan by Settlement Planning in 1992 (Madikwe Reserve Regional Plan, October 1992);
- The management plan for Madikwe Reserve by the Madikwe Development Task Team in 1997 under editorship of Philip Johnson (The Madikwe Game Reserve Management Plan, August 1997);
- The financial and economic approach of Madikwe Game Reserve by Richard Davies, Carl Trieloff and Michael Wells in 1997 (Financial and Economic Objectives and management of the Madikwe Game Reserve, October 1997); and
- The partnership approach of Madikwe Game Reserve by Richard Davies in 1997 (Madikwe Game Reserve—a Partnership in Conservation, October 1997).

The Heritage Park Expansion Model

Components of the Model

The most important components of the Heritage Park model are reflected below.

² Studies on file: Contour Project Managers CC, Reg. No CK 91/30370/23, PO Box 4906, Rustenburg 0300, South Africa, email: contour@mweb.co.za.

Significant Protected Areas in place. Two successful Protected Areas, PNP and MGR, are established, both with a successful history of benefits to the management agency itself as well as to neighboring communities. This engenders a positive attitude and confidence among politicians, adjacent landowners, and the investment community. In addition, the region is established as a tourism destination with a growing tourist demand.

Structure. A competent and experienced management agency, the NWPTB is in place with the necessary legal mandate, policies, legal tools, institutional framework, and management capacities to manage this expansion model, which is based on land incorporation and partnerships.

Support Through Awareness. It is an absolute imperative that at least the political and community leaders, as well as the affected landowners, obtain a better understanding of the conservation and tourism environment, the model and its costs and benefits before they can be expected to support and constructively participate in a project of this nature. The fact that a history of conflicts exists between protected areas and landowners and communities and/or mining companies, and the fact that the different government departments may have conflicting ideas about the best use of the land, makes this aspect the most significant and time consuming challenge.

Shared Vision and Commitment. Unless the authorities and the landowners have a shared vision and unless they formally commit to each other as well as the project, the project is bound to fail and will therefore remain a pipe dream. Great effort has to be made to get firm written commitments as soon as possible in the project cycle. The need for partnerships cannot be overstressed.

Signing for Land Incorporation. A further requirement of the Heritage Park Expansion Model is that landowners should be enticed to incorporate on a voluntary basis. This requirement came about as a result of the NWPTB coming to the realization that they need not require the land to obtain conservation objectives. The examples in KNP and other areas in South and Southern Africa assisted in this regard. As soon as landowners and communities get the impression that they will be forced to participate, they can be expected to start questioning the motives of the lead agency and will start resisting and undermining the project. Therefore, honest negotiations combined with constant and open consultation and communication is essential.

Statutory Framework. The new Protected Areas Act in South Africa now makes it possible to formally proclaim private and community held land as Protected Areas, provided they meet with the necessary requirements.

Stimulate. It is necessary to create a positive and conducive climate, by proactively promoting the model and assisting voluntary landowners to participate in the program. To stimulate and sustain interest and remove impingements is essential for success.

Support Infrastructure. The Heritage Park project needs to be firmly integrated with the Local Economic Development Plans to ensure infrastructure is developed in an integrated fashion. Synergies created between municipalities and the

Heritage Park have many service delivery advantages for local communities and tourism operators.

The Process

The Park Expansion process that was followed comprises the following steps.

Concept Plan

A Concept Plan was developed in 2002 as an initial discussion document in consultation with key stakeholder representatives, to inform stakeholders and to direct and guide possible further planning and implementation processes. This Concept Plan formed the basis for further discussions with stakeholders who participated in the molding of a Business Plan for Phase 1. A Strategic Environmental Assessment is currently being done through which the Concept Plan will be updated with more recent information.

Public Participation

During the planning phase, a full public participation program was followed (see fig. 2).

Phase 1 Business Plan

A Phase 1 Business Plan was developed in 2003 by elected representatives from recognized social structures within the

target communities, who were assisted by a technical team comprising ecologists, park planners, tourism researchers and social scientists.

Situational Analysis studies were conducted to assist stakeholders in making the correct choices in terms of future land use options. These included (1) topographical assessments that mapped all relevant features and support infrastructure, (2) road counts to determine possibilities for future road closures and re-alignments, (3) soil and vegetation surveys that identified sensitive areas and unique and attractive features, (4) market research and gap analyses to determine demand and growth trends and potential tourism options, (5) demographic analyses to determine human and social dynamics and needs, and (6) expected economic impacts based on historical case studies within PNP and MGR.

The final prognosis was that the Heritage Park could make substantial contributions to the conservation and socio-economic objectives of the North West Province. The predicted results for the first phase, which represents about 50 percent of the corridor, indicated the requirement for an infrastructure investment of R43 million (U.S. \$6 million) and a further R60 million (U.S. \$9 million) for game introductions. It was, however, estimated that this investment of R103 million (U.S. \$15 million) would leverage a private sector investment of R451 million (U.S. \$64 million) in tourism products, increasing the conservation footprint, eco-tourism product, and game populations of the region by 50 percent over a period of 10 years. This would result in 1,500 construction related jobs, 905 permanent jobs in park

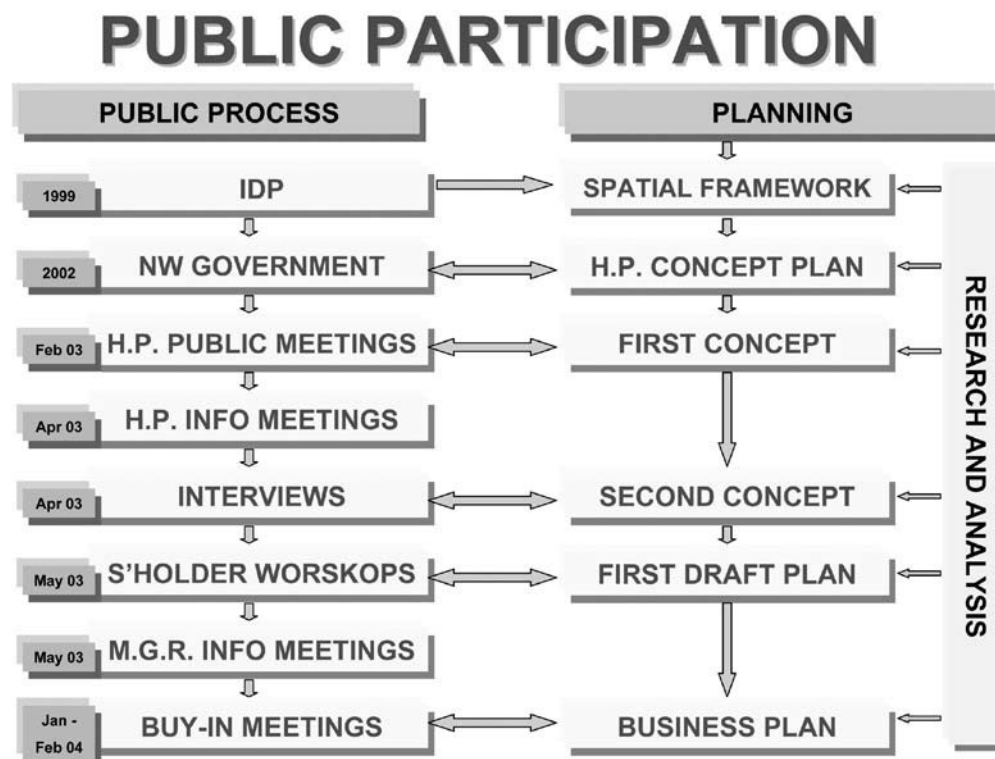


Figure 2—Public participation process during the planning phase.

and lodge management, 1,730 indirect jobs, a wage bill in temporary jobs of R123 million (U.S. \$18 million), and an annual wage bill in permanent jobs of some R32 million (U.S. \$5 million).

Lead Partners

After having obtained provincial support, the NWPTB formally entered into a Memorandum of Understanding in April 2005 with their mother department, the Department of Agriculture, Conservation, Environment and Tourism, the two affected District Municipalities and the two affected Local Municipalities. The six partners jointly committed to the project and clarified roles and responsibilities in line with their respective mandates.

Institutional Capacities

In 2003, during the planning phase, the key stakeholders comprising the aforementioned lead partners, the traditional leadership, key government agencies, and participating landowners formed a Steering Committee that was tasked to draft an Implementation Plan based on the recommendations of the Phase 1 Business Plan. By September 2005, they had met for 20 consecutive months since inception to

develop an Implementation Plan and to guide it through its first phases of execution.

The project management and secretariat service functions, as well as certain technical tasks, were contracted to a project management agency (Contour Project Managers).

The six key government partners are currently the only funding partners of the project. They registered a nonprofit company to manage the affairs of the Heritage Park. The Heritage Park Company will not own any land, game, or infrastructure because it is established purely as a facilitation entity. The land and game will belong to the appropriate landowners, whether it is the state, private sector, or communities. Between them they will have appropriate management capacities and institutional arrangements to govern the day-to-day administration of the Protected Area.

The Heritage Park Steering Committee and the newly formed Heritage Park Company set up working groups made up of specialists within the partner agencies that provide technical advice and support. The Heritage Park Company will make policy and direct the process, while the Steering Committee that represents a wider interest group will participate in a review session of the Implementation Plan every six months. Figure 3 illustrates the structure, roles, and relationships between the different components of the institutional model.

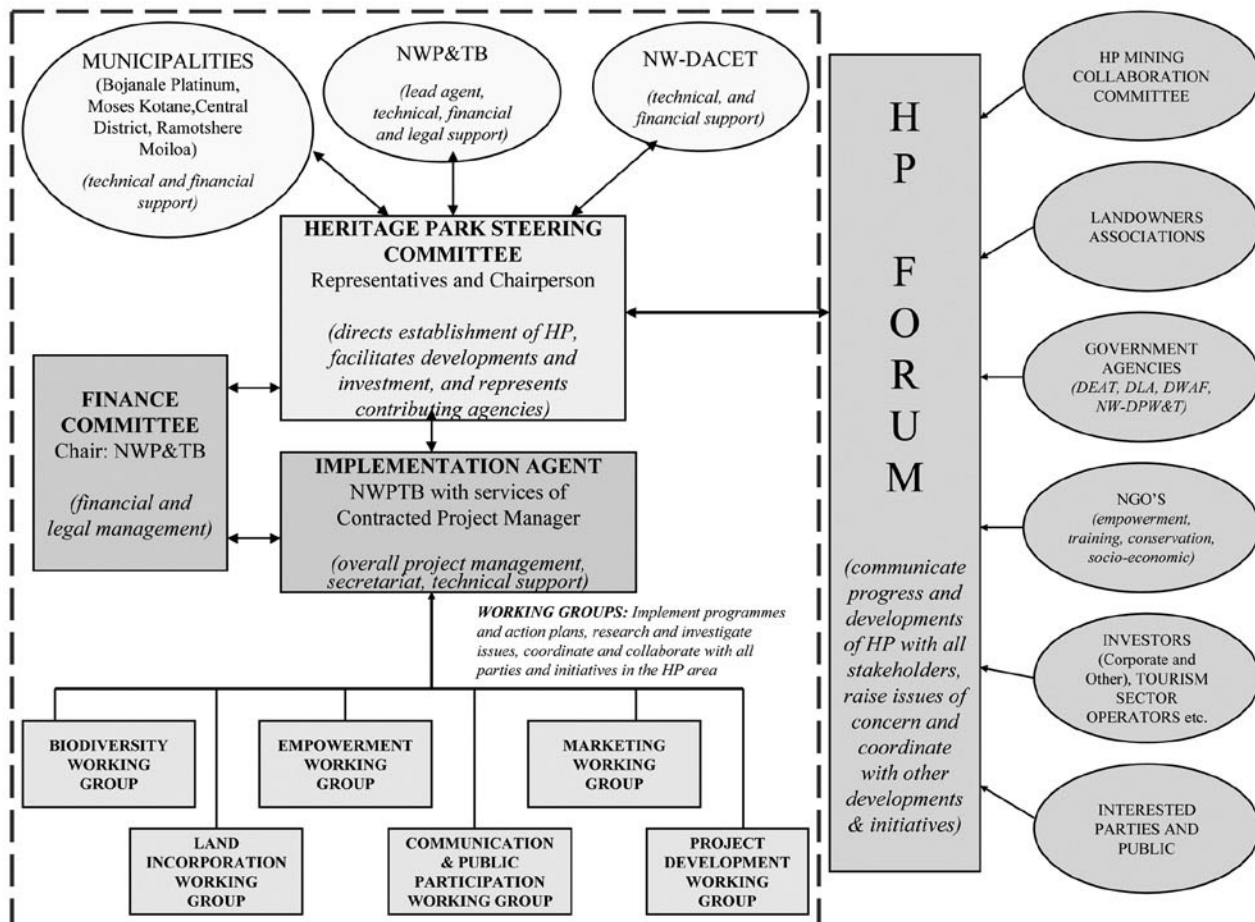


Figure 3—Institutional arrangements.

Implementation Plan

The Implementation Plan addresses all the requirements of the model. The Implementation Plan is made up of three Programs. Each Program in turn is made up of several Action Plans. The Programs with their Action Plans are:

1. Commitments by Key Role Players (Final Buy-in Key Role Players, Support Agencies, Funding, Land-Right Issues, Negotiate Land Incorporation)
2. Marketing and Communications (Marketing, Communications, Investment Procurement, Public Participation)
3. Capacity Building (Institutional Structures, Technical Support, Empowerment Services)

Review Process

During the biannual review process of the Implementation Plan, the results are measured against the objectives, strategies, and standards of each Action Plan within each Program. The Implementation Plan is then revised to address shortcomings and new challenges and to capitalize on successes and newly identified opportunities. The first review workshop was held during January 2005 and the revised Implementation Plan was approved in March 2005.

Technical Support

The secretariat and working groups provide technical support in the form of project management and secretariat skills, educational tours, and interactions with comparable case studies, public participation and workshop facilitation, and standardized documentation such as landowner association constitution and land incorporation agreement templates, investor procurement processes and documentation, design criteria and specifications for protected area infrastructure, etc. Specialist advice and services include planning, marketing and communication, legal and contractual, empowerment services, funding procurement and investment procurement.

Interested Land Owners

It was expected that landowners would only start expressing interest towards the end of this year. There was hope that interest for approximately 70,000 ha (172,974 acres) would be expressed by 2008; however, current interest already represents 100,000 ha (247,105 acres) within just more than one year of implementation. Figure 4 shows the current status of negotiations with interested landowners.

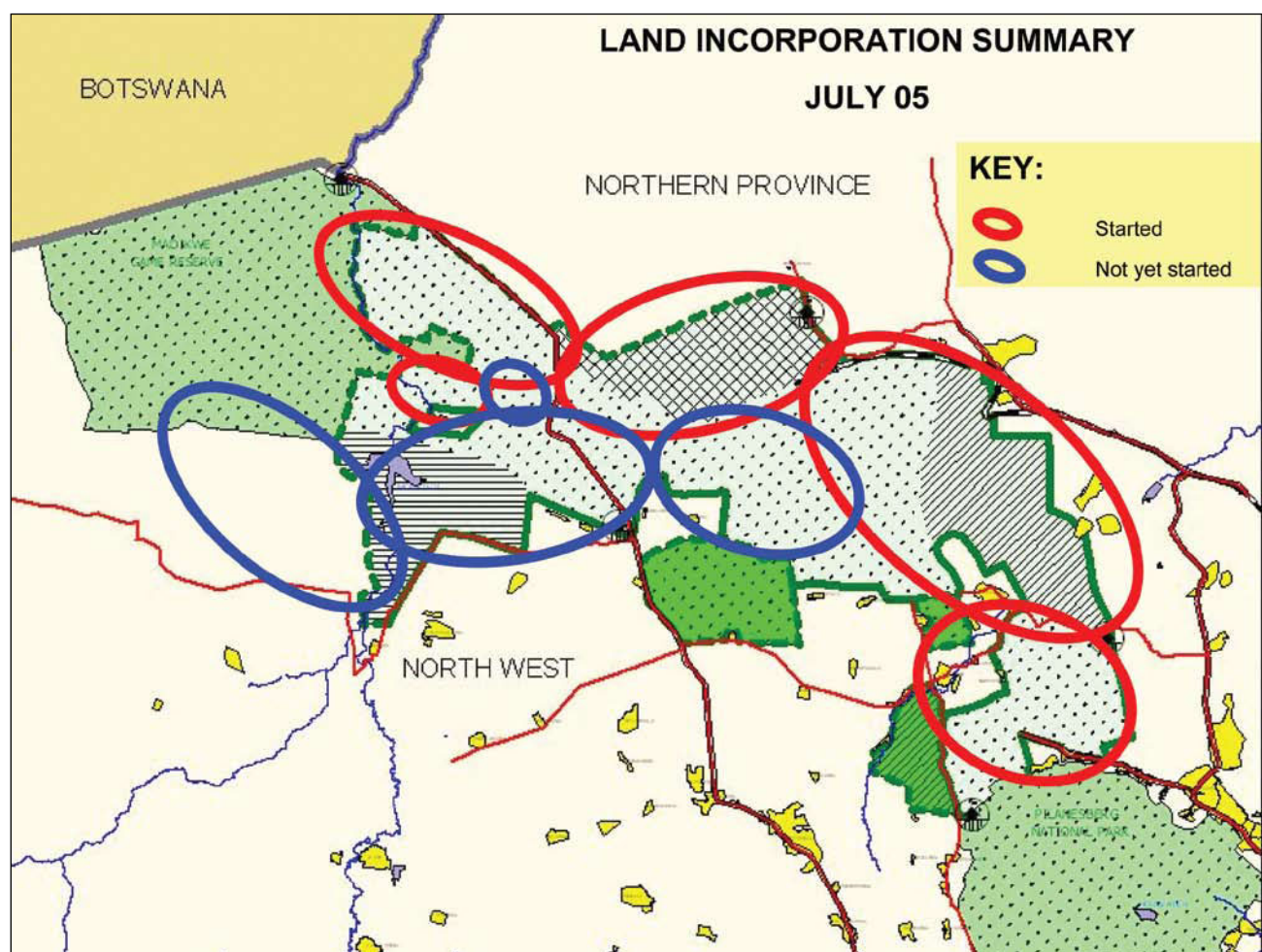


Figure 4—Interested landowners as of September 2005.

Conclusions

It is still premature to conclude on the acceptance or rejection of the hypotheses, as the Heritage Park Expansion Model has only been in its post planning implementation phase for a period of less than 2 years. However, considering the limited funding, significant progress has been made in addressing the diverse challenges of establishing a conservation corridor, following a philosophy of voluntary incorporation in a poor rural area.

The evaluation of the components of the Heritage Park Expansion Model has the following results.

1. A common vision has been created and commitments have been received from all key stakeholders.
2. Collaboration with Department of Land Affairs to achieve national Land Reform objectives is successful.
3. A collaboration agreement has been entered into with the mining companies for the joint planning and development of the area.
4. Landowners have expressed much greater interest much sooner than expected.
5. Awareness has been created among target communities and stakeholders and significant exposure has been obtained through media coverage of various events.

6. An open participative process has been followed.
7. Institutional structures are in place.
8. Technical support is in place.

At this rather early stage, the partnership and evolutionary approach of the Heritage Park Expansion Model already appears to be a successful mechanism in overcoming challenges and achieving goals in a complex socio-economic and political environment in a poor rural area of South Africa.

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