
Saldanha Bay Municipal area:

Economic overview with a focus on Tourism

Executive Summary

Purpose of the study

The Green Connection, with support from the Heinrich Böll Foundation, has been experimenting with a new approach to the sustainable and inclusive development of small towns – known as Koeksister economics - starting with Saldanha Bay Municipality (SBM). This approach brings people together to collectively develop social standards and customs relating to the use of shared resources. It also prioritises localisation, low-carbon development, and respect for planetary boundariesⁱ.

Against this backdrop, this report provides an overview of economic development plans and initiatives in the SBM, including Tourism. It considers these economic sectors and their prioritisation in terms of reported and possible societal and environmental impacts and risks, where these are described in various spatial, environmental and futures reports for the area.

Economic overview, developments, and plans for SBM

Saldanha Bay Municipality is situated 140 km northwest of Cape Town. Fishing has traditionally been a key sector of the local economy. SBM is heavily reliant on this industry and its associated activities. Tourism, also an important economic activity in SBM, is substantially based on the area's natural and cultural resources, including the Langebaan lagoon, the West Coast National Park, cultural and heritage attractions and the spring flower season.

The Freeport

Saldanha Bay is the largest natural, deep-water port in the Southern Hemisphere equipped to deal with the import and export of bulk materials such as oil and iron ore. An Industrial Development Zone (IDZ) focused on the port area, now known as the Freeport, was declared in 2012. Most economic plans point to the IDZ in SBM as a vehicle to support growth through investments in export manufacturing industries. The vision for the IDZ is for it to be the primary oil, gas, and Marine Repair engineering and logistics services complex in Africa, servicing the needs of the upstream Oil Exploration Industry and Production service companies operating in the oil and gas fields. The Freeport also seeks to foster investment in logistics, repairs and maintenance, and fabrication activities.

While Accelor Mittal's (Amsa) steel plant in SBM has closed, a recent announcement signals a R3.5-billion first phase of a planned seven-phase infrastructure investment project. According to media reportsⁱⁱ, the SBIDZ has a pipeline of 52 investors, of which 11 have signed lease agreements, with an investment value of R3.2-billion, with 18% of the gross area has been leased. Four projects have been earmarked for the port's South Western Precinct with a capital cost of R3.5-billion.

A signed Joint Development Agreement between Arcelor Mittal South Africa and Sasol has also been reported in the media. This is to explore two joint projects one of which is a Saldanha green hydrogen and derivatives study. This study will investigate the potential for the area to become an export hub for green hydrogen and derivatives with support from the governmentⁱⁱⁱ.

Despite these plans and announcements, the Freeport is currently operating at only 18% capacity. While an increase in activity could support economic growth, skills in the area are not aligned with IDZ industries. This could result in the in-migration of skilled labour, which won't address local unemployment. Furthermore, contrasting the recent upbeat announcements at the Freeport, questions have been raised more generally about the effectiveness and appropriateness of the design of the Special Economic Zones (which includes IDZs) in South Africa^{iv}.

Exceeded planetary boundaries and other threats to sustainable development in SBM

Indications are that environmental considerations are not fully integrated into the SBIDZ or its tenants' operations despite plans that the proposed ship recycling activity in the IDZ be a "green" facility". The Department of Trade, Industry and Competition has identified Strategic Economic Zones (SEZs) need to comply with environmental requirements as a major risk to their performance^{vi}.

Recent research into the *planetary boundaries* in the SBM^{vii} indicates that ecosystems and the ecological services in the area supporting human survival are under pressure. SBM is overshooting its planetary boundaries for 'water withdrawal', 'water pollution', 'land conversion', 'terrestrial biodiversity loss', and 'marine biodiversity loss'.

Other threats, identified in the 2011 Spatial Development Framework^{viii} and 2015 Environmental Management Framework^{ix} for the area include the expansion of the IDZ, increase in ribbon development adjacent to the coast, and poor and inadequate infrastructure and service delivery^x.

Tourism: better suited to meet SBM needs

While the Freeport and its proposed industrial activities receive much prominence in plans, a 2019 report undertaken for the municipality identifies Tourism as the most attractive sector in the area to support future development. The 2019 Socio-Economics Futures report^{xi}, an input into the IDP, is different from other economic plans and policies as it provides scenarios and scoring based on a novel approach to industry identification. This uses revealed comparative advantage (RCA) with a multicriteria decision framework (MCDA) of six components.

Nine industries in four sectors were identified for SBM using the RCA, growth, and employment potential criterion. These industries are olive farming, aquaculture, olive processing, boat building, maritime components, petroleum, renewables, tourism, and the retirement industry.

The MCDA process then scored each of these industries against six factors (including their ability to meet future job creation targets, likely resource use and resource constraints required for this, as well local incentives, and future potential risks). For example, industry impacts on the resources of land and water; electricity and skilled labour were included as was the potential of the identified industries to use treated effluent water/groundwater; their distance to relevant markets; low rents relative to other areas; potential to cluster the industry; climate (where wind and the lagoon are important) and an existing iron ore terminal. Similarly, the impact of an industry on the water table and potential solid waste, air, and water pollution were also considered, as was the requirement for upfront capital expenditure. Other risks considered were long-term secular decline; climate change and the risk of international and national recessions.

Tourism emerged as the top industry. The lowest-scoring industries were petroleum products, renewable electricity generation, and olive processing.

Tourism performance and linkages to nature

Tourism cuts across all three spheres of government in South Africa. Within the West Coast District Municipality (WCDM) Integrated Development Plan (IDP), it is noted that municipalities are responsible for leading, managing, and planning for development, and responsible for the "Promotion of local tourism for the area of the district municipality"^{xii}. The WCDM IDP implementation plan contains a number of areas relating to tourism development and marketing but does not, however, make reference to threats or constraints associated with this. Furthermore, SBM does not currently have a dedicated tourism resource in the municipality to support the sector.

In 2016, prior to Covid, Tourism was estimated to comprise between 16 and 20% of the local Gross Domestic Product (GDP) of Saldanha Bay^{xiii}, although more recently, in 2020, ‘wholesale and retail trade, accommodation and catering’ was estimated at only 11% of regional GDP for SBM^{xiv}. This decline is likely partly attributable to Covid, also a slowdown in the economy, decreased property investment in the area, and measurement challenges related to tourism. (Satellite accounts for tourism are not yet developed for the municipal level so the full direct impact of the sector is seldom properly captured).

The Western Cape Tourism Blueprint 2030 - the provincial strategy for tourism - includes a comprehensive analysis of what more than 300 000 people said online about the West Coast District. Overall, outdoor activities and relaxation and wellness generated the highest volume of online conversations. Similarly, the greater Saldanha Bay Environmental Management Framework of 2021^{xv} indicates that the natural characteristics of the area are an important asset, particularly for the tourism industry.

Globally this link between and nature is also increasingly recognised. A 2022 World Travel and Tourism Council report, ‘Nature positive travel and tourism’^{xvi} makes three key points about the linkages between nature and tourism:

1. Over half of global Travel & Tourism demand is driven by the desire to explore nature.
2. More than 80% of tourism’s goods and services are highly dependent on nature.
3. Conservation efforts, protected areas, and local economies are fuelled by the presence of visitors and their expenditures.

According to the South African National Biodiversity Institute, in 2017, domestic and international biodiversity visitors collectively spent R34 billion in South Africa, providing 89 500 jobs^{xvii}. Beaches, wildlife, and mountains were the top tourist attractions. In the Western Cape, according to research undertaken by South African Tourism^{xviii} into the activities of foreign tourists in South Africa in 2021, 52,5% of surveyed tourists visited Natural Attractions; 50%, Beaches; 29%, Wildlife; and 34%, Adventure experiences.

In the SBM, the West Coast National Park and Langebaan Lagoon are major sites of tourism, recreation, and leisure. The West Coast National Park is the fifth most-visited national park in South Africa, and received 250 638 visitors in 2019/2020. During flower season, thousands of visitors flock to the area to enjoy the beautiful flowers and spend money not only at the park but in the broader region. The West Coast is also recognised as one of the leading kite surfing destinations in the world and Langebaan has approximately 10 kitesurfing schools. 80 000 lesson hours were estimated for kiteboarding in Cape Town and Langebaan together (in 2018) with an average price of R500 per hour. 70% of these lessons were for visiting foreigners who amounted to about 15 000 visitors a year^{xix}.

Many other recreational activities in WCNP and Langebaan lagoon as well as the region are based upon the natural environment and the landscapes and biodiversity of the area. But pollution, invasive alien species, marine, and terrestrial biodiversity loss all threaten the tourism appeal of the SBM.

Concluding comments

To inclusively and sustainably develop the economy of the SBM more must be done to protect the natural assets and ecosystems of the area. This recognises the importance of Tourism and other nature-based economic activities in the area, and that Tourism is the sector identified as having the greatest potential to assist SBM to reach its development objectives.

Recommendations include: enhancing and integrating planning in the area, including linking together development scenarios, trade-offs, and risks that different economic choices entail. Tourism planning also needs an update, while port plans need to be scrutinised in terms of their likely impacts on natural resources and on already exceeded planetary boundaries. New methods of planning, such as those employed in the Socioeconomic Futures report, need to be more routinely adopted to allow for a fuller impact of impacts, risks, opportunities, and threats based on the local context.

The new West Coast National Park management plan, due in 2023, presents an opportunity to re-engage SANParks on the state of and risks to ecosystems and biodiversity as well as to jointly prioritise key actions. A full Conservation Development Framework will also be developed for WCNP in the near future¹. A reconsideration of buffer zones and activities could allow for a strategic conversation on complementary economic activities adjacent to the park.

Beyond planning, capabilities must be (rapidly) developed or recruited in the municipality and the WCDM, not just for tourism, but to ensure that environmental management is in place more generally. This is also true for the SBIDZ Limited Company, where environmental safeguards and standards are not being adequately addressed and where skills gaps exist.

There is an associated opportunity here. If the Freeport, municipality, and broader stakeholders are proactive in their environmental management role, beyond safeguarding and improving important planetary boundaries in the area, they could explore the potential for the development of a green economy in SBM. Provincial agencies such as GreenCape and the Atlantis IDZ could support this with their skills and experience.

More generally, as the IDZ plans are a clear priority for the government, it is critically important that residents, tourism stakeholders, environmental organisations and other interested parties' inputs are heard in the various approvals and planning processes. This includes the Environment Impact Assessment that is underway for the first phase of the SBIDZ and the current IDP process of the SBM.

¹ According to the Western Cape Government: Environmental Affairs and Development Planning's Draft Environmental Planning Framework for the Greater Saldanha area. March 2021.

ACRONYMS

Amsa	Arcelor Mittal
EIA	Environmental Impact Assessment
EMF	Environmental Management Framework
EMZ	Environmental Management Zone
GDP	Gross Domestic Product
IDP	Integrated Development Plan
IDZ	Industrial Development Zone
MOA	Memorandum of Agreement
MCDM	Multicriteria Decision Framework
RCA	Regional Comparative Advantage
SANParks	South African National Parks
SA Tourism	South African Tourism
SBIDZ	Saldanha Bay Industrial Development Zone
SBM	Saldanha Bay Municipality
SEZ	Strategic Economic Zone
TBCSA	Tourism Business Council of South Africa
WCDM	West Coast District Municipality
WCNP	West Coast National Park

TABLE OF CONTENTS

1. Introduction	3
The assignment and its objectives	3
Research approach	3
2. Background to Saldanha Bay Municipality	4
Economic performance	5
Ecosystems and the environment in SBM	8
Saldanha Bay Industrial Development Zone (SBIDZ) and Limited Company (SBIDZ-LC)	10
3. Economic plans for Saldanha Bay	14
Development potential – making choices between sectors	20
4. Tourism: an important economic sector in South Africa	21
Economic impacts, industries and employment.....	21
Tourism, small towns, and firms	22
Tourism supply chains	22
Covid impacts and recovery.....	25
5. Tourism performance and plans	25
Tourism economy of Saldanha Bay	25
Other tourism performance reports	25
Tourism role-players and industry organisation.....	26
Tourism Plans	27
6. Tourism and nature: conceptual and practical links	30
7. Concluding comments	35
Annexure 1: EMZ4 in the Draft EMF for the Greater Saldanha area	37
References	38

1. Introduction

The assignment and its objectives

Over the past year, The Green Connection, with support from the Heinrich Böll Foundation, has been experimenting with a new approach to the sustainable and inclusive development of small towns – known as Koeksister economics - starting with Saldanha Bay Municipality (SBM).

The Koeksister approach combines Kate Raworth’s doughnut economics concept with two others: ‘commoning’ and the ‘transition towns’ movement. Commoning is when people come together to collectively develop social standards and customs relating to the use of shared resources. The ‘transition towns’ approach prioritises localisation, low-carbon development, and respecting planetary boundaries^{xx}.

At the same time as consultations with residents have been ongoing as part of the Saldanha Koeksister economics project, a number of new developments and announcements have been made about the Saldanha Bay port and industries. Major infrastructure and industrial development may result in negative impacts in the area. Such negative impacts could be harmful to residents, and damage sectors of the economy that rely on the natural beauty and ecosystems of the region as the basis of their productive activities. Tourism, in particular, fundamentally relies upon the destination experience of intact nature – that is, the wildflowers, rivers, coastline, and lagoon of Langebaan, amongst other natural assets and landscapes in the area.

Research approach

In order to better understand economic plans for the area, their possible impacts, and the importance of the tourism economy in SBM, this report provides an overview and synthesis of existing development plans with a drilled-down focus on tourism. The links between nature and tourism are also explored, both conceptually and practically.

The report is structured into a number of sections:

1. Background: the situation and economy of SBM
2. Economic plans and economic potential
3. Tourism: an important economic sector in South Africa
4. Tourism plans, and tourist attractions and experiences in SBM
5. The relationship between Tourism and nature.

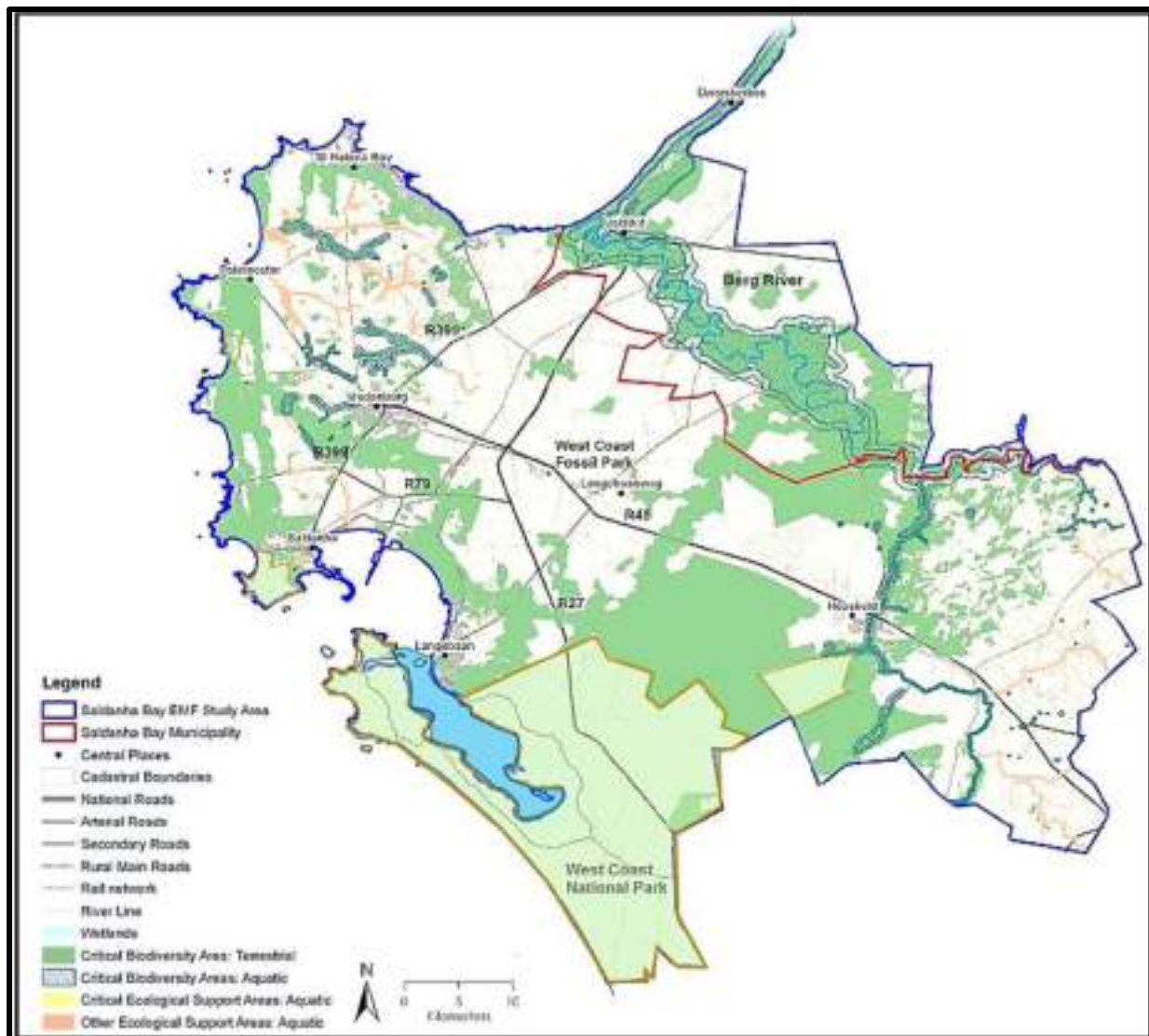
2. Background to Saldanha Bay Municipality

Saldanha Bay Municipality is situated 140 km northwest of Cape Town with two major routes that link the area to Cape Town: the R27 and the N7. There are several settlements along the coastline, with the largest towns being Saldanha and Vredenburg. Coastal towns such as Paternoster, St Helena Bay, Jacobsbaai, and Langebaan are popular areas for holiday homes. Vredenburg is the largest administrative and commercial centre in the West Coast District. Inland, Hopefield is a service centre for the grain, dairy, meat, and honey farmers in the area^{xxi}.

Saldanha Bay is the largest natural, deep-water port in the Southern Hemisphere. An Industrial Development Zone (IDZ) focused on the port area was declared in 2012 with the intention of attracting further investments for export industries. The Port is comprised of an iron ore terminal for the export of iron ore, an oil terminal for the import of crude oil, a multi-purpose terminal dedicated mostly for export of lead, copper and zinc concentrates, and the Sea Harvest/Cold Store terminal that is dedicated to frozen fish products. There is also a facility for small vessels used mainly by fishing vessels, and the Transnet small-craft harbour facility^{xxii}.

Traditionally, the fishing industry has been a key sector in the area, particularly in St Helena Bay and Saldanha Bay towns. Tourism has become an increasingly important economic sector in recent years and is largely based on the natural and cultural resources of the area. The region is well known for its natural beauty, in particular the Langebaan lagoon, the coastline, and the spring flower season. There are also important cultural resources in the area, which include paleontological and archaeological features.

Figure 1: Saldanha Bay Municipality



Source: WPG (2015) in Le Grange (2016).

Economic performance

The Saldanha Bay municipal area is the largest economy in the West Coast District Municipality (WCDM). The Saldanha Bay municipal area’s regional Gross Domestic Product was valued at R10.9 billion (current prices) in 2020 and was estimated to have increased by 6 percent in 2021 in real terms. In 2020, the agriculture, fishing and forestry sector was the leading contributor, at R2.2 billion followed by the manufacturing sector and the finance sector. It is forecast that the economy of the municipal area will increase by 3.4 percent in 2022, and by 0.7 percent in 2023^{xxiii}. Most plans point to the IDZ in SBM as a vehicle to support growth through investments in export manufacturing industries.

Income for SBM comes mainly from electricity charges, property rates, water, grants, sewage and refuse which together constitute 89% of total revenue in 2021. Property rates are expected to be the largest source of income in the future, as there is a high demand for new property development. In

2021 the municipality approved 1 095 new building plans and 'included in the 46 562 serviced properties in SBM, are 5 583 (12%) vacant properties' (SBM, 2022) ^{xxiv}.

According to the West Coast District Municipality's final amended Integrated Development Plan (IDP) 2022- 2027^{xxv}, there are approximately 123 000 people living in the SBM area and this number is expected to grow to 132 000 in 2025. Of this population, 24% of households were indigent in 2020.

SBM had an unemployment rate of 19% in 2019. About 4 225 jobs were lost in 2020 due to covid and its restrictions and resulting economic impacts. The Saldanha Bay experienced a low number of new employment opportunities between 2015 and 2019, with an average annual increase of 504 jobs respectively.

Table 1, which follows, provides an comparison of the economic impacts of three industries critical to the SBM: Fishing, Tourism (using 'Catering and Accommodation' as a partial proxy), and the IDZ, (using 'Metals, metal products, machinery and equipment' industry as a partial proxy). Data is provided for 2015, 2018, and 2021.

Table 1: Comparing Fisheries, Tourism and the IDZ's economic impacts in SBM

	GVA (constant 2015, millions)			Jobs			Other local economic impacts		
	2015	2018	2021	2015	2018	2021	Skills intensity	Major supplier inputs	Tax impacts
Fishing Industry	3219	3626	4653	17322	15973	13774	Low skills' intensity	Petroleum; tanks, and other metals; financial services; other business and support services	Many small-scale fishers = limited local tax income. Tax from processing facilities and operations.
Catering and Accommodation industry	1248	1197	1143	1312	1518	1088	Low skills' intensity	Business services, support services, real estate services, food inputs	Large tax income from property related taxes
Metals, metal products, machinery and equipment industry	327	405	392	845	779	675	High/ medium skills intensity	Electrical machinery & equipment during construction and transport equipment once the IDZ is in operation	Local property rates and services' income from tenants of Freeport. Certain tax exemptions but these are largely for income tax, and customs duty and VAT, not property taxes.

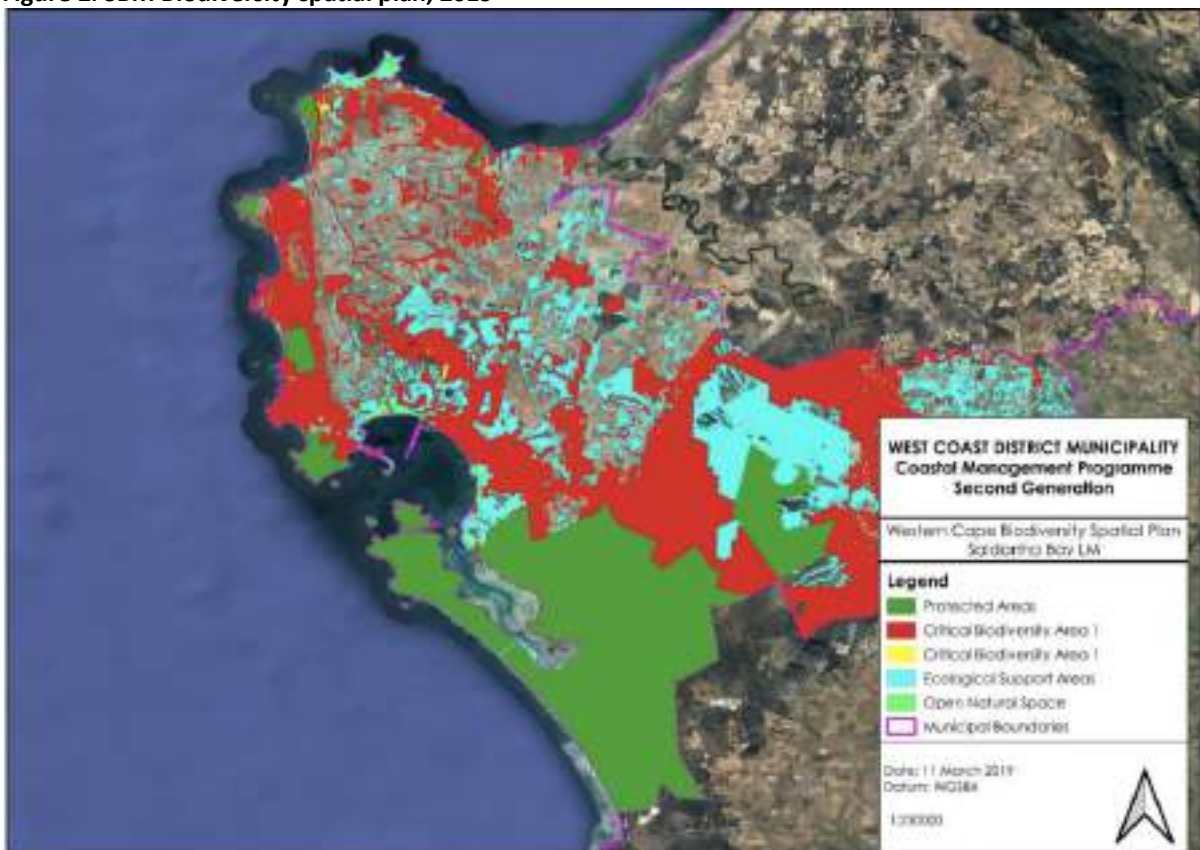
Source: Author's calculations based on Statistics SA Supply-Use tables (2022), and Quantec (2023).

In terms of jobs' contribution, Fishing remains the most important industry by far for SBM, although jobs have declined over time. In Tourism, in 2020, close to one-third of tourism jobs were lost, likely due to covid and the economic recession. The main IDZ industry, 'metals, metal products, machinery and equipment', remains a relatively small contributor to the local economy, with some jobs lost over the period, presumably mostly in relation to the closure of the Amsa steel mill.

Ecosystems and the environment in SBM

The SBM has considerable areas of important biodiversity as indicated in Figure 2, which follows. Outside the core area of the park, critical biodiversity areas exist throughout the local municipal area.

Figure 2: SBM Biodiversity spatial plan, 2019



Source: Saldanha Bay Municipality, 2019. Coastal Management Programme.

West Coast National Park

The West Coast National Park, managed by South African National Parks (SANParks), is the core protected area. The park totals 47 457ha and stretches from Yzerfontein in the south to Langebaan in the north and from the Atlantic Ocean in the west (approximately 30 km of coastline) across the West Coast road (R27) towards Hopefield in the east. It includes the Langebaan lagoon and the offshore islands of Marcus, Malgas, Schaapen and Jutten. The Park has a high level of protected conservation status: National Park; Marine Protected Area, Ramsar status; and is the core area of the Cape West Coast Biosphere Reserve.

The Park Management Plan for the period 2013 – 2023 was amended in 2018 to include the development of a Park Zonation Plan. The primary objective of this is to establish a coherent spatial

framework in and around the part to guide and coordinate conservation, tourism and visitor experience initiatives. The National Park has a buffer zone, which identifies areas where land uses and activities impact the park. A full Conservation Development Framework will be developed for WCNP in the near future².

An extract from the existing management plan, provided in Figure 3 below, lists management challenges.

Figure 3: Management challenges, West Coast National Park (2012).

Park Attribute	Factors to be considered pertaining to the Park Attribute
Unique marine lagoon system	<ul style="list-style-type: none"> • Expanding harbour and increasing shipping traffic • Oil pipeline Saldanha – Milnerton • Inappropriate developments in and around the Lagoon • Water quality entering the lagoon from bay, urban surrounds as well as potential large scale pollution events • Non-sustainable extractive resource use • Invasive alien species • Alteration of flows by flow barriers
Globally important biodiversity	<ul style="list-style-type: none"> • Alien species invasion • Fire management • Seabird / waders management • Fisheries management • Use of the park as a 'short-cut' between R27 and Langebaan • Large herbivore management • Ecosystem connective and functionality
Open natural system	<ul style="list-style-type: none"> • Expanding harbour and increasing shipping traffic • International treaties and agreements • Joint and co-operative management
Altered landscapes	<ul style="list-style-type: none"> • Natural ecosystem processes • Tourism and recreational potential • Heritage landscapes
High conservation protection	<ul style="list-style-type: none"> • Ramsar site • Contractual properties
Cultural and natural heritage	<ul style="list-style-type: none"> • Local knowledge is dying out and being diluted before it is formally captured: <ul style="list-style-type: none"> ◦ Perceived lack of coordination in the collation, archiving and dissemination of the cultural heritage of the park ◦ Different perceptions exist of entitlement and mandate to "control" heritage resources amongst the community and authorities • A limited budget for maintenance in the face of theft, removal and general deterioration of the physical heritage resources • Development that conflicts with heritage architecture • Potential conflict between biodiversity and cultural heritage management objectives with respect to shaded / cultural landscapes vs pristine fynbos • SANParks' capacity, competency and expertise to implement heritage plans
Growth in tourism demand	<ul style="list-style-type: none"> • Lack of overnight facilities within the park • Limited access to important recreational areas • Need to ensure continued safety and security of visitors to the park • Need to build strong relations with local tourism industry • Park products and pricing
Distinct sense of place	<ul style="list-style-type: none"> • The preservation of the unique 'sense of place' by managing noise and visual intrusions from roads and urban development • Potential for uncoordinated and inappropriate development and access within and surrounding the park as well as conflicting user activities within the park
Park Support	<ul style="list-style-type: none"> • Vibrant and good support

Source: SANParks, West Coast National Park plan, 2012.

Planetary Boundaries

² According to the Western Cape Government: Environmental Affairs and Development Planning's Draft Environmental Planning Framework for the Greater Saldanha area. March 2021.

Recent research into the *planetary boundaries* in the SBM^{xxvi} indicates that in the study area the ecosystems and the services supporting human survival are under pressure. In SBM, of the 8 planetary boundaries considered, 5 overshoot their boundary, for 1 there is no data to assess performance, and 2 boundaries are contested. Clearly overshooting their planetary boundaries are ‘water withdrawal’, ‘water pollution’, ‘land conversion’, ‘terrestrial biodiversity loss’, and ‘marine biodiversity loss’. There is no data for ‘ocean acidification’ and the ‘climate change’ data (that is, on emissions) for SBM is outdated. While ‘air pollution’ data is within acceptable limits, it remains a concern raised by some residents.

These ecosystems are the basis for life and economic production. In Saldanha Bay, given its coastal situation and industries, and port in the area, ocean and coastal ecosystems are particularly critical. A recent report^{xxvii} suggests that the protection of these resources is not adequately prioritised despite ocean and coastal ecosystems underpinning much economic and other value for stakeholders. The IDZ is recognised as an opportunity if it can link to environmentally sound economic development potential through climate-smart economic growth. This kind of growth is understood to protect and/or restore natural ecosystems while supporting sustainable production. Recommendations include that investments be made in climate-smart skills, linked to maritime industries and the marine protected area. Here, one particular proposal is that the fishing community, which is dependent on a depleting resource, could be re-skilled for a more diversified ocean economy. Examples of potential threats to the area include air pollution from red dust, green ship recycling impacts, power ships, and invasive species.

The 2011 Spatial Development Framework and 2015 Environmental Management Framework for the area identify the expansion of the IDZ, increase in ribbon development adjacent to the coast, and poor and inadequate infrastructure and service delivery as the biggest threats in the area^{xxviii}.

Saldanha Bay Industrial Development Zone (SBIDZ) and Limited Company (SBIDZ-LC)

Saldanha Bay Industrial Development Zone (IDZ) was officially pronounced in a ceremony on 31 October 2013. Its aim is to leverage the deep port, good rail and road infrastructure, and proximity to Cape Town. A 2016 Act provides that an SBIDZ company (SBIDZ-LC) is to promote manage and market the SBIDZ; provide internal infrastructure in the area; facilitate the ease of doing business in the area; and acquire and lease land incidental to the company’s business. The SBIDZ is now referred to as *Freeport Saldanha*.

In the *2019 Socio-economic futures report*^{xxix} developed for SBM (see Table 1, page 14), it is suggested that SBIDZ development could lead to growth in the local economy of 2,7% between 2019 and 2027, higher than experienced in 2018. The main economic stimulus is expected to be within the construction sector, which is modelled to result in growth in the metal products sectors.

Other sectors projected in that report to grow as a result of the SBIDZ construction are the ‘electrical machinery & equipment’ and ‘transport equipment’ (the latter during operations). In turn, indirect benefits are expected to accrue in support sectors, such as financial services. The IDZ-related growth is also expected to lead to more job creation: about 2 300 more jobs in 2022 and 3 400 in 2027. In turn, this is projected to result in a decline in the narrow unemployment rate.

In November 2020, SBIDZ-LC, SBM, and WCDM signed a Memorandum of Agreement (MOA) in respect of development and environmental matters. The MOA is broad and focuses on many areas from youth development, to economic research, transportation, and investment promotion. The MOA’s

operationalisation has led to the establishment of a partnership between the SBIDZ and SBM which is reflected in a number of joint initiatives, including:

- Various projects to upgrade bulk and transportation infrastructure within the municipal area;
- Rejuvenating the West Coast Business Chamber;
- Attracting investors into the SBIDZ and the wider municipality;
- a Social Facilitation project: a process to design and facilitate an inclusive social engagement process with multiple stakeholders geared towards co-creating and crafting a Developmental Path for the Greater Saldanha Bay Area^{xxx}.

It is reported that by 2022, the SBIDZ had created 2,911 jobs; attracted over R21 billion in investments; leased approximately 18% of its gross area; offered skills training to over 2,300 beneficiaries; and spent over R200 million (~35%) on local subcontractors^{xxx}, amongst other impacts.

The SBM Integrated Development Plan (IDP) review for 2022 places the SBIDZ and its development at the core of the SBM long-term development strategy, with a link to the first strategic objective of the IDP, that is: “to diversify the economic base of the municipality through industrialization, de-regulation, investment facilitation, and tourism development whilst at the same time nurturing traditional economic sectors”^{xxxii}.

The vision for the SBIDZ is for it to be the primary oil, gas, and Marine Repair engineering and logistics services complex in Africa, servicing the needs of the upstream Oil Exploration Industry and Production service companies operating in the oil and gas fields. The SBIDZ also seeks to foster investment in logistics, repairs and maintenance, and fabrication activities.

The SBIDZ is operating under a 4-year grant/loan from provincial government which will end in March 2023. As it is operating at only 18% capacity, an increase in activity could support economic growth, but skills in the area are not aligned and this could result in the in-migration of skilled labour, which won’t assist with local employment creation.

Furthermore, it is reported^{xxxiii} that environmental considerations are not fully integrated into the SBIDZ or its tenants’ operations despite plans that the proposed ship recycling activity in the IDZ be a “green” facility, compliant with the European Union Regulations for Green Ship Recycling and the South African Department of Environmental Management Act No 59 of 2008. Notably, the Department of Trade, Industry and Competition has identified SEZ’s need to comply with environmental requirements as a major risk to SEZs performance^{xxxiv}.

There are risks posed by certain activities, such as ship recycling which could lead to large levels of waste. And, in general, ports are often associated with the introduction of alien species, and as Langebaan Lagoon already has the highest number of alien species of all the MPAs along the West Coast the development of the port could exacerbate this risk.

On the other hand, opportunities aligned to the ocean and marine economy include that the SBIDZ has a Marine and Energy Sector Innovation Ecosystem. Another opportunity is that the additional waste creation likely with an expanded IDZ could provide entrepreneurship opportunities in recycling, re-use, etc. if this becomes a deliberate focus, supplier development and investment area^{xxxv}.

Recent announcements and developments

According to media reports, the SBIDZ has a pipeline of 52 investors, of which 11 have signed lease agreements, with an investment value of R3.2-billion, with 18% of the gross area has been leased.

Four projects have been earmarked for the port's South Western Precinct with a capital cost of R3.5-billion.

The R3.5-billion first phase of a planned seven-phase infrastructure investment project at SBIDZ has been announced. Phase 1 will focus on marine services jetties, a floating dock, and ship lift facilities, and plans to enable the centre zone of the port and Transnet National Ports Authority to offer a greater variety of services. The environmental impact assessment for Phase 1 is under development. The EIA should be published by August 2023.

The SBIDZ will submit the project to the Investment and Infrastructure Office in the Office of the Presidency. The infrastructure project is projected to create about 10 000 jobs at the height of construction, while 6 000 jobs will be created in the operational phase^{xxxvi}.

A 'Re-industrialising Saldanha Day' was held by the SBIDZ and Amsa in November 2022 with the aim of showcasing the SBIDZ as an ideal green hydrogen investment destination in the Western Cape.

In contrast to these upbeat announcements, critique exists of the effectiveness of Special Economic Zones (which includes IDZs), questioning their effectiveness and appropriateness in design, based on the experiences of the past two decades^{xxxvii}.

Textbox 1: Amsa and Saldanha Bay

Saldanha Terminal has been an important exporter of iron ore by Accelor Mittal South Africa (Amsa) which owns the steel works. A largely export focused plant, Saldanha Works is situated close to the deep-sea port of Saldanha and employed 568 staff. The plant was commissioned and produced its first Hot Rolled Coil in late 1998.

Amsa closed its steel plant in Saldanha two years ago, in part, reportedly due to the high price of electricity. It's now looking to reopen the plant using green hydrogen rather than fossil fuels to make low-carbon steel. However, according to the company, without access to competitive rates and the necessary capacity from Transnet Freight Rail, a restart of the works is unlikely. For this reason, recent reports (November 2022) indicate that Amsa will restart its operations at Saldanha on condition of the granting of a number of applications with government:

- Amsa has approached Transnet, Eskom, the Western Cape Government and the Saldanha Bay Municipality for help to restart the Saldanha Works operations which convert iron ore/ coke steelmaking to an electric scrap -melting model, using 100% South Africa scrap metals.
- Nersa approved Eskom's application for a three-year negotiated pricing agreement with Amsa Saldanha Works in August 2022.

Media reports also indicate that Amsa has recently signed a Joint Development Agreement with Sasol to explore two joint projects one of which is the Saldanha green hydrogen and derivatives study. This study will investigate the potential for the area to become an export hub for green hydrogen and derivatives with support from government.

Source: Independent Online^{xxxviii} and News24^{xxxix}

Small Harbours Repair and Maintenance Programme

Recent upgrades to the Saldanha Harbour were included in the 13 Proclaimed Fishing Harbours upgrade programme of the Department of Public Works and Infrastructure in March 2022. This project aims to improve the performance of small harbours to revitalise local economies and to support the local fishermen, tenants, and surrounding communities.

The upgrades completed at Saldanha and Pepper Bay Harbour included work on the slipway infrastructure at Saldanha harbour, civil infrastructure as well as electrical infrastructure work both at Saldanha and Pepper Bay harbours. Around R98.6 million has been spent for the infrastructure upgrades work at the Saldanha Bay and Pepper Bay harbours^{x1}.

3. Economic plans for Saldanha Bay

Table 2 provides an overview of the many plans which have reference and relevance to the development of the SBM area. Most reference the IDZ and port.

- *At the national level*, the National Infrastructure Plan with its Strategic Infrastructure Projects includes Saldanha Bay, as does the national masterplan for Steel.
- *At a provincial level*, the various strategic plans and frameworks make reference to Saldanha Bay and the IDZ.
- *At a district level*, the West Coast District Municipality IDP provides strategic context and implementation priorities in different functional areas, many of which have a bearing on SBM.
- *At a local level*, the SBM is currently developing a new IDP for the local municipality.
 - The IDP makes reference to other plans that realise its objectives such as an updated Local Economic Development (LED) strategy, Economy Recovery Plan, Service Level agreements with the Saldanha IDZ, and Saldanha Bay Municipality Tourism, the Vredenburg Urban Revitalisation plan, Langebaan Light industrialisation plan.
 - In 2019, a socio-economic scenario report was produced for the municipality to provide a number of development and growth scenarios. This is discussed in the narrative section which follows Table 2.

Table 2: Economic plans

Name of plan	Purpose of Plan	References to Saldanha Bay
National		
<p><i>National Spatial Development Framework, 2019</i></p>	<p>The NSDF is focused on changing the spatial legacy of apartheid, to unlock spatial opportunities for all people in all areas.</p>	<ul style="list-style-type: none"> • Saldanha Bay is recognised as an import/export node; • Saldanha-Vredenburg, Mooredsburg and Clanwilliam are identified as regional development anchors; • The N7 is recognised as a key national road and interregional transport route/corridor; • The Sishen-Saldanha iron ore railway line is recognised as a key rail route; • The southern parts of the district is designated is an area for agricultural enterprise and small scale farming, as well as eco-resource production area.
<p><i>Infrastructure Development Act, as amended in 2014 and the Strategic Infrastructure Projects (SIPs)</i></p>	<p>The Presidential Infrastructure Coordinating Commission designated 18 Strategic Integrated Projects (SIPs) to accelerate national infrastructure implementation</p>	<p><i>SIP 5 is Saldanha Northern Cape development corridor.</i></p> <p>In addition, two new subprojects for SIP 21 were gazetted on the 24 July 2020^{xii} on transport, which have a bearing on Saldanha: the Small Harbours development, and the Boegoesbaai Port and Rail infrastructure Project. They include:</p> <ul style="list-style-type: none"> • Integrated rail and port expansion. • Back-of-port industrial capacity (including an IDZ). • Strengthening maritime support capacity for oil and gas along African West Coast. • Expansion of iron ore mining production and beneficiation.
<p><i>Steel Masterplan, 2022</i></p>	<p><i>To deliver a coherent overall plan for South Africa’s steel industry development.</i></p>	<p><i>The masterplan recognises the existence of the Amsa plant and importance of its re-opening. “Isacor’s Saldanha plant was built as a state of the art integrated producer. It has been mothballed. It has been proposed that the plant be restarted and incorporated in a West Coast steel complex, including the re-rollers and other users. Exports from Saldanha are geographically well placed for Africa, the USA, South America and the EU. Investigations in this respect are under way” (p35).</i></p>
<p><i>Transnet National Ports Authority and SBIDZ-LC, MOU in 2019/ 2020.</i></p>	<p>The shared vision is the establishment of an marine oil and gas and marine fabrication and repair complex within the confines of the Port of Saldanha and the SEZ.</p>	<p><i>Detail not available.</i></p>
Name of plan	Purpose of Plan	References to Saldanha Bay
Provincial Level		

<i>Western Cape Provincial Growth and Development Strategy, 2019-2024 and linked Western Cape Strategic Plan 2019-2024.</i>	Sets out the Western Cape Government's strategic vision and priorities	<p>The Saldanha Bay industrial Development Zone (SBIDZ) Under the section on 'Growth and Jobs', and subheading 'Attracting investment into Catalytic infrastructure'.</p> <p>SBIDZ is seen as a driver of the oil, gas and marine engineering sector.</p> <p>Tourism is also recognised as a labour intensive export sector.</p>
<i>Western Cape Infrastructure Framework</i>	The infrastructure portfolio is aligned to the long-run growth and development of the Western Cape as well as the provincial Recovery Plan	The WCIF identifies that the harbour and industrial development in Saldanha will create a need for a substantial transition in infrastructure coordination, administration and provision related to bulk water supply, energy generation, transportation and Information and Communications Technology.
<i>Western Cape Provincial Spatial Development Framework, 2014</i>	To guide municipal integrated development plans and spatial development frameworks so as to prioritise and align investment and infrastructure in the Western Cape Province through a clear indication of the desired development directions for the province.	<p>The PSDF identified specific issues and strategies. For SBM these include:</p> <ul style="list-style-type: none"> • Prepare an industrial development / environmental conservation plan for Saldanha Bay that acknowledges this sub-region's extreme environmental and economic sensitivities. • Prepare an action plan to adapt to global climate change. • Formulate a coastal management plan to address pressure for development along the coast. • Promote ecological corridors linking the coastal zone to the Cederberg Mountains. <p>Specific to the West Coast District, the PSDF map includes the following spatial designations, which are considered relevant to the West Coast District SDF:</p> <ul style="list-style-type: none"> • Saldanha-Vredenburg as an urban functional region, being the growth and economic node in the District.
Name of plan	Purpose of Plan	References to Saldanha Bay
<i>District level</i>		
<i>West Coast DM IDP, 2022 - 2027</i>	The IDP is a planning and strategic framework to help municipalities fulfil their developmental mandate	<p>Economic objectives include to:</p> <ul style="list-style-type: none"> • Create opportunities for growth and jobs, in urban and rural areas; • Promote and enhance resource-use efficiency and invest in renewable 'green' energy projects;

		<ul style="list-style-type: none"> • Improve and expand infrastructure – Saldanha IDZ and iron ore railway line. <p>Multiple points of reference and relevance for SBM including with respect climate change, coastal management, air and water pollution and quality, other planning and capabilities. It recognises that for certain functional areas the municipality is under resourced and proposes to focus “available resources on those issues that are deemed to be significant and require urgent response and to embark on a “cycle of improvement”.</p>
<i>West Coast Spatial Development Framework, 2020</i>	The tool to integrate the local municipal strategies, acknowledging linkages between municipalities, proposing spatial growth continuity at a broader scale and addressing district-wide spatial issues and challenges	<p>The SDF points to popularity of the DM for its natural flower display in parts of the Matzikama and Cederberg areas as well as the Cederberg Mountains, the seaside villages such as Yzerfontein, Paternoster and Lambertsbay as well as the Rooibos cultivation area and the Langebaan Lagoon.</p> <p>It also notes both the strategic location of the Saldanha Port and the sensitive areas of biodiversity. It recommends future development be aligned towards the major regional development centre, including Vredenburg, Saldanha, Langebaan, St Helena Bay and Velddrif. Saldanha Bay is upgraded to a regional node and the SDF is aligned the various infrastructure plans which privilege the IDZ and port development for economic growth.</p>

Name of plan	Purpose of Plan	References to Saldanha Bay
Local Level		
<i>SBIDZ Strategic Plan 2020 - 2024</i>	This plan is located within the National SEZ programme and the provinces PSP.	No specific details
<i>Saldanha Bay IDP</i>		A new IDP is under development.
<i>Socio-economic futures report, 2019</i>	The Municipality appointed StratEcon to develop a strategic economic and financial framework to facilitate economic inputs into the next generation IDP ^{xiii} .	<p>This report is arranged around a specific job creation target, following three cumulative growth paths and various socio-economic shocks.</p> <p>The report indicates that the target of 6 500 additional jobs by 2027 will not be achieved with the current socio-economic trajectory (even with the expected economic boost from the IDZ). Additional growth needs to come from either from existing or new industries. Nine potential industries are identified:</p> <ul style="list-style-type: none"> • Agriculture – 1) olive farming and 2) aquaculture; • Manufacturing – 3) olive processing, 4) petroleum products, 5) maritime components and 6) maritime fabrication (boat building); • Electricity generation through 7) renewable energy; • Services – 8) tourism and 9) the retirement industry. <p>See 3.1 below for a discussion of this report.</p>
<i>Saldanha Bay Municipal SDF</i>	Adopted in 2019, this plan is the principal tool the municipality uses to achieve its desired spatial form.	The SBIDZ is identified as part of a number of development initiatives that influenced industrial development and contributed to the broadening of the economic base of the municipal area. The SDF reflects that the “identification of areas for future industrial development” as a key strategy towards implementing part of its spatial vision relating to the “promotion of the industrial area, including high-tech economic development, to take advantage of global demand opportunities and encourage local employment and capacity building”.

Name of plan	Purpose of Plan	References to Saldanha Bay
<i>Saldanha Bay Municipal Infrastructure growth plan</i>	The purpose of the plan is to provide an overview of the infrastructure needs of Saldanha Municipality within the broader context of economic, developmental and human settlement related factors.	The SBIDZ and the envisioned developments in the IDZ are viewed as a determining factor that will shape the economic and basic service delivery infrastructure.
<i>Saldanha Bay Local Economic Development plan</i>	<i>Addresses economic development and growth potential for the SBM</i>	<p>The plan states that additional growth requires reduction of key constraints and to earn more revenue from external markets:</p> <ul style="list-style-type: none"> • Strategy 1: Retain large existing exporting businesses • Strategy 2: Promote Aquaculture-, Fishing-, and Food processing sectors • Strategy 3: Tourism growth • Strategy 4: Attract new industrial investors by creating a more enabling environment Increase local enterprise share of local markets: • Strategy 6: Support local SME to access more opportunities • Strategy 7: Credible vocational skills development and tertiary education available.
<i>Environmental management framework for greater SBM</i>		<p>An environmental management framework (EMF) for SBM and a portion of the Bergriver municipality was produced by the provincial government in 2021 with the intention to have one integrated Spatial Development Framework / EMF in the future to promote consistent decision-making.</p> <p>Two conservation-focused Environment Management Zones (EMZs) and three development-focused EMZs have been determined. One of the development EMZs is for the Industrial Activity Zone which includes the port area. It notes the biodiversity and pollution risks associated with an expanded port together with potential economic benefits.</p>

Development potential – making choices between sectors

While the strategic environment frameworks and environmental management frameworks try to assess, and spatially address and manage, relative perceived resource needs, uses, impacts, and constraints, most economic plans tend to be reduced to GDP contribution and gross job impacts (not considering trade-offs, or whether jobs are local or ‘imported’, for example).

The Socio-economics Future report of 2019 is an exception. It provides scenarios and scoring based on a novel approach to industry identification using revealed comparative advantage (RCA) and combining this with a multicriteria decision framework (MCDA) of six components. At a local level, the RCA amounted to an assessment of which industries have had a strong historic performance, combined with employment intensity.

Nine industries in four sectors were identified using the RCA, growth and employment potential criterion, shown in Table 3.

Table 3: Nine high-potential industries in SBM

Sectors	Industries
Agriculture/ aquaculture	Olive Farming
	Aquaculture
Manufacturing	Olive Processing
	Boat Building
	Maritime components
Energy generation	Petroleum
	Renewables Electricity
Services	Tourism
	Retirement industry

Source: Stratecon, 2019.

The MCDA’s six components provide a measure of political considerations and broader linkages and impacts. The MCDA was based on a measurable objective: job creation, with a ten-year job creation target set. Against this, each industry was considered in terms of necessary turnover and resource use – with land and water recognised as the major resource constraints and electricity and skilled labour as short-term resource constraints. In terms of local area incentives, considerations included direct incentives, marketing costs and ability to lobby either directly or indirectly.

Also, the potential of the identified industries to use treated effluent water/ground water; the distance to relevant markets; low rents relative to other areas; potential to cluster the industry; climate (where wind and the lagoon are important) and an existing iron ore terminal were considerations. Similarly, impact of an industry on the water table and potential solid waste, air, and water pollution were also considered, as was the requirement for upfront capital expenditure. Other risks considered were long-term secular decline; climate change and the risk of international and national recessions.

Tourism emerged as the top industry with a score of 4.21 out of a possible 5. Second was olive farming with 3.63, followed by aquaculture. The lowest-scoring industries were petroleum products, renewable electricity generation, and olive processing. A sensitivity analysis was also undertaken with different emphases between objectives, constraints, opportunities, and risks. The tourism and retirement industries were consistently ranked as the top industries.

This study is the only one to undertake some consideration of resources, constraints, and linkages between natural and human capital well as the use of local incentives and comparative advantage. It clearly establishes tourism as the industry with the most potential for overall positive impacts.

4. Tourism: an important economic sector in South Africa

A tourist is by definition someone who travels outside his/her/their normal environment for more than 24 hours but less than one year for any purpose other than undertaking remunerated work in the destination. Tourism accordingly comprises local tourists (from the same province, but not the same municipality), other domestic tourists (from outside of the province), and foreign tourists. The main purposes of travel are usually for holidays, visiting friends and relatives, business events (like conferences, exhibitions, and meetings), business travel, travel for religious reasons, education, health, etc.

Prior to Covid, in 2019, South Africa received just over 10 million foreign tourist arrivals with most coming from neighbouring countries. Most foreign tourist arrivals to the Western Cape are air arrivals and not cross-border regional tourists and their expenditure per tourist is higher than the average for the country.

Domestic tourism remains the largest contributor in value terms to the South African tourism economy. In 2019, there were 28.2 million overnight domestic trips undertaken^{xliii}. More recent data, from SA Tourism, which covers January and September 2022, shows that domestic tourism has rebounded, with 24 million overnight trips in that period alone. This is a 138.6% growth rate over the same period in 2021^{xliv}.

Economic impacts, industries and employment

In Tourism, economic value is established through the Tourism Satellite Account methodology which uses a consumption-based approach. Tourism-characteristic industries are identified based on where visitors' expenditure is a significant share of total consumption. Tourism-characteristic industries include passenger transport, accommodation, restaurants, travel agencies and similar, cultural and sports, and recreational services^{xlv} These are the industries in which tourists spend money. Retail is also important for tourism, but is a non-characteristic industry as visitor expenditure on retail only comprised 9% of all retail income in 2019. Accommodation, water and air transport, transport equipment rental industry, travel agencies, and other reservation services are the industries most highly reliant on tourism – that is, where the tourism industry ratio is 65% or over. That means that more than 65% of the income in those industries is from tourists.

In terms of its economic contribution, the 2019 provisional Tourism Satellite Account for South Africa^{xlvi}, estimates Tourism's direct economic contribution to the South African economy was about 3.7% of GDP, amounting to some R121 billion in export earnings in that year and 773 533 direct tourism jobs. There was also an estimated additional 740 000 indirect and induced jobs^{xlvii} in that year, as estimated by the World Travel and Tourism Council. Tourism has a high employment intensity and can absorb relatively low-skilled workers. Direct employment numbers are shown below in Table 4 for 2019.

Table 4: Direct tourism employment, 2015 – 2019, in South Africa

	2015	2016	2017	2018	2019
--	------	------	------	------	------

Direct Employment numbers	635 544	630 509	575 910	611 737	773 533
Tourism share of total employment in SA	4%	4%	3,6%	3,7%	4,7%

Source: Statistics South Africa. 2021. Provisional Tourism Satellite Account, 2019.

In 2019, the breakdown of the total 773 533 direct tourism jobs (that is, those jobs created by foreign and domestic visitor consumption in tourism-characteristic industries) was:

- road passenger transport industry, 241 155 jobs;
- food and beverage industries, 147 833 jobs;
- retail trade industries, 151 625 jobs; and
- accommodation industry, 118 346 jobs.

The smaller industries of travel agencies and other reservation services, the cultural industry, and the sports and recreation industry, together accounted for about 67 000 jobs in 2019.

Black African South Africans held 76% of total jobs across the tourism industries in 2019 and women comprised 40% of all tourism industry jobs. There are considerably more women than men employed in the food and beverage serving industry and accommodation industry, but far fewer women working in industries like road transportation.

Tourism, small towns, and firms

Tourism disperses economic activities across the country and is a critical source of income for many small towns around the country, including the SBM. For example, Bitou, Knysna, and Overstrand in the Western Cape; Bela-Bela in Limpopo; and Okhahlamba in KwaZulu-Natal, are municipalities where more than 30% of local GDP came from tourism pre-Covid^{xlviii}.

Research into tourism in small towns and rural areas indicates that small towns rely mainly on domestic tourists. In South Africa, in 2012, there were 15 million tourism trips to small towns, with a value of R51 billion in expenditure. While this research is somewhat dated, it is likely the trend of small towns relying on domestic tourists has continued as Covid spurred domestic travel and also resulted in new domestic segments travelling.

Most tourism enterprises are small, medium and micro-enterprises (SMMEs). There were approximately 50 000 tourism SMMEs tax-registered in South Africa in 2018^{xlix}. In fact, SMMEs are estimated to constitute about 90% of all tourism businesses in the country.³ Many informal tourism enterprises also exist, including tourist guides, crafters, informal food operators, home-sharing establishments, and informal transport providers. Transformation of the sector has been slow and the sector is dominated by white-owned and managed SMMEs. Many of these operate family-owned businesses. The majority of large enterprises have low levels of procurement from enterprises with a majority Black shareholding^l.

Tourism supply chains

Tourism supply chain analysis and studies have not been comprehensively undertaken for the tourism sector in South Africa. These could be instrumental in mapping procurement opportunities for local

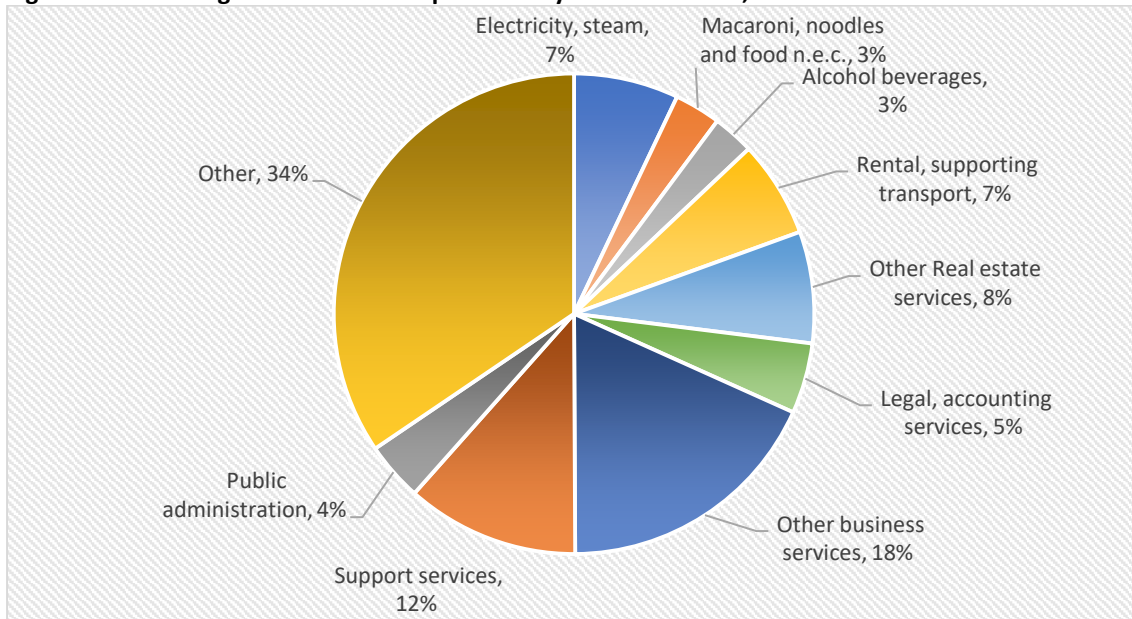
³ In 2019/20, of the total number of 39 824 enterprises registered with CATHSSETA, 37 928 were small enterprises. The CATHSSETA's funds are severely curtailed as SMMEs are exempt from paying the Skills Development Levy. This limits the tourism human resource development work that can be undertaken (CATHSSETA, 2020).

economies to capture more local value.

Statistics South Africa's 2019 Supply Use Tables provide an indication of which goods and services specific tourism-characteristic industries spend their money on. An assessment of this data sheds light on major procurement expenditures by certain tourism-characteristic industries.

For the category, 'Hotels' (which includes all accommodation), the total output for this industry at basic prices in 2019 was R68 billion, up from R64 billion in 2018. In 2019, of the R68 billion, R29 billion was total uses at purchasers' prices, or procurement spend. 'Other business services', and 'support services' are the highest spend categories; followed by 'other real estate', 'electricity, steam', and 'other transport services'. These comprise the main goods and services bought by hotels and other accommodation in that year overall.

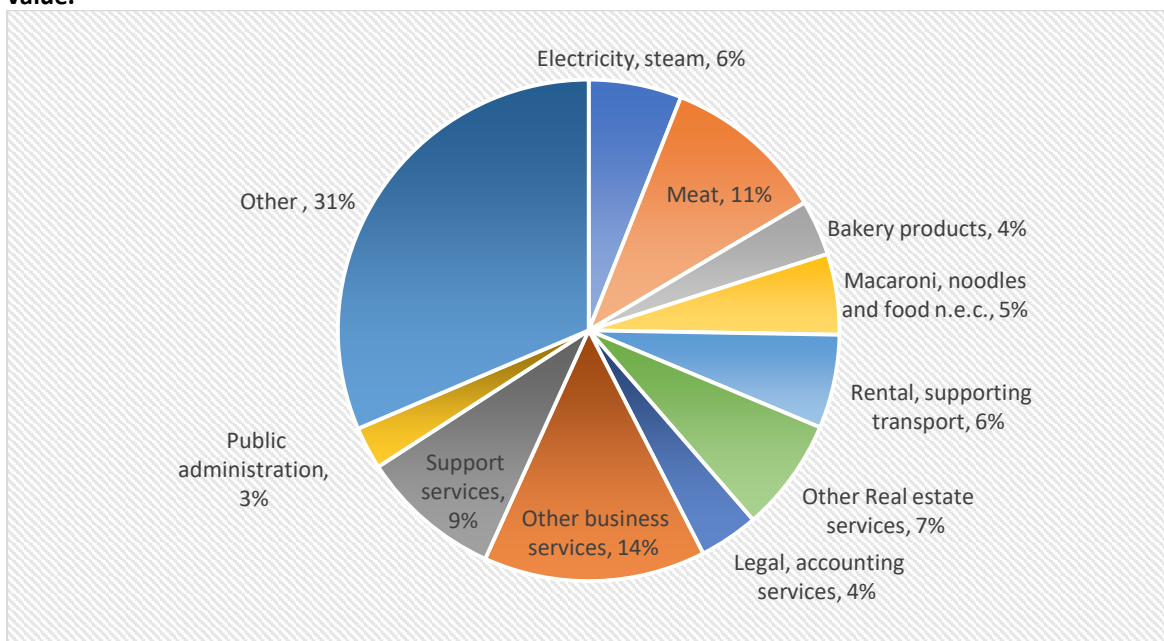
Figure 4: The main goods and services procured by 'Hotels' in 2019, as a share of R29 billion in 'use' value.



Source: Statistics South Africa, 2021. Supply-use tables.

In 2019, the 'Restaurant industry' had a total output of R88 billion, of which 'total uses at purchasers' prices' was R67 billion. The main goods and services procured by 'Restaurants' are shown in Figure 5, by percentage share. These were 'other business services', 'meat', 'support services' followed by 'other real estate', and 'electricity, steam'.

Figure 5: The main goods and services procured by 'Restaurants' in 2019, as a share of R67 billion in 'use' value.



Source: Statistics South Africa, 2021. Supply-use tables.

The above charts indicate that 'business services' and other kinds of 'support services' are major categories of procurement expenditure by hotels and restaurants. These are the industries with the strongest links to tourism in value terms, including the stimulation and support of indirect jobs. 'Other

business services include legal, accounting, tax, market research, consultancy, architectural, engineering and technical, and advertising.

Other industries often cited as providing goods and services include the construction industry, agricultural and agro-processing (food and beverage) industries, as well as car hire.

Covid impacts and recovery

Covid had severe impacts on tourism around the world. With an enormous contraction in demand and restrictions on travel and gatherings, much tourism income and many jobs were lost. Recent data for 2022 shows global tourist numbers beginning to recover. In South Africa, strong domestic numbers (as described above) and forward bookings for foreign tourists for summer 2022/2023 season see a return back to close to 2019 levels. Most forward bookings are from Europe and the Americas. There has been an 88% increase in bookings for September 2022 to February 2023 from the USA alone^{li}.

5. Tourism performance and plans

Tourism economy of Saldanha Bay

While one source of data indicates that in 2016, prior to Covid, Tourism comprised between 16 and 20% of the local GDP of Saldanha Bay^{lii}, the most recent Municipal Economic Review and Outlook for 2022/3 indicates that SBM relies more on the primary and secondary sectors than the tertiary, into which tourism characteristic industries fall. In fact, 'wholesale and retail trade, accommodation and catering' was estimated at 11% of regional GDP for SBM in 2020.

It is not clear why there is this anomaly in the data. Perhaps it is in part due to difficulties with measuring the tourism sector's full impacts without tourism satellite accounting at the local level. Furthermore, as indicated above, tourism comprises more than the catering and accommodation industries, with many other industries also making a contribution in terms of GDP and employment.

Other tourism performance reports

A tourism report for January to June 2022 for the WCDM^{liiii} draws on data provided by local tourism offices, based on surveys completed by visitors to their offices. It is accordingly indicative of trends of these visitors but is not statistically representative of all tourists to the DM.

It provides a number of data points and insights:

- Between January and June 2022, the largest proportion of travellers to the Weskus (WCDM) originated from the domestic market (86,8%), in particular from within the Western Cape (76,4%) itself.
- The overseas market accounted for 13,2% of visitors over the period, led by the United Kingdom, Germany, and Netherlands.
- The main purpose of travel to the Weskus was for holiday (over 80%) and 3% for business. Wine tasting ranked as the top tourism activity enjoyed in the region, followed by shopping, adventure, cuisine, and beaches.
- 54,7% of visitors took day trips to the Weskus and overnight stays accounted for 45,3% of trips, with two nights as the most common length for overnight stays. Most visitors fell within the age groups 36-50 and 51-70 years.

- The largest proportion of respondents travelled to the region in pairs or on their own. Own motor vehicles (57,1%) were the preferred mode of transport over the period, Just over 20% of visitors to the West Coast spent between 0-R200 and R1001-R2000 per day in the region respectively, followed by 17,6% who indicated an average expenditure of R501-R1000. 32% of respondents did not specify their average daily spend.
- Word of mouth (27,9%) ranked as the top information source utilised across the period and 11,7% of visitors used the internet as their main tool for information.

In terms of the performance of major tourist attractions, the West Coast National Park, !Kha ttu and the Old Jail in Vanrhynsdorp together received a total of 81,138 visitors between January and June 2022 and showed strong recoveries of volumes relative to 2019 numbers. The best recovery was recorded by !Kha ttu (at 93%).

The *West Coast National Park* welcomed 72,103 visitors between January and June 2022. The park recorded a year-on-year increase of 6.5% when compared to 2021 and recovered to 64% of 2019 visitor numbers.

Tourism role-players and industry organisation

Tourism cuts across all three spheres of government with each having roles and responsibilities for the sector. It also involves many different agencies of government such as national and provincial parks bodies, museums, and heritage agencies.

Many industry associations also exist for most of the tourism-characteristic industries. While the Tourism Business Council of South Africa (TBCSA) is the umbrella body that represents the sector at large, tourism often also has local tourism associations which can be fully government-funded and driven, public-private partnerships, or fully private bodies. These local tourism organisations typically coordinate and market (and some also transact, or book) on behalf of their local tourism enterprise members. Currently (February 2023), SBM does not have a dedicated tourism resource in the municipality.

The *West Coast Way* is a private sector destination marketing company active in the West Coast region. It focuses on marketing the biodiversity-rich nature and culturally-rich small towns through road trips⁴.

⁴ The organisation was founded in 2014 by a group of business people who wanted economic growth for the Cape West Coast. The first route was the Culture Route, followed in 2015 and 2016 with more routes. 6 routes now exist: the Culture Route, Foodie Route, Berg Route, Tractor Route, Wild Route and the Cape Way. Private businesses sign up for the route promotion service to benefit from marketing support, exposure, and networking.

Figure 6: Westcoastway routes



Source: <https://www.westcoastway.co.za/wp-content/uploads/2021/12/West-Coast-Way-Route-South-Africa-2021.png>

Tourism Plans

A number of tourism sector strategies provide strategic priorities for the sector's inclusive growth. These are summarised in Table 5, which follows.

Table 5: Tourism plans

Name of plan	Purpose of Plan	Reference to Saldanha Bay	Implications and considerations
Tourism Sector Response Plan	While a national tourism masterplan does not currently exist, the Tourism Sector Recovery Plan for the country was approved by Cabinet in April 2022. It contains high-level strategic interventions.	None – not geographically focussed.	Generally supportive of demand and supply side measures
Provincial Tourism Blueprint 2030	Guide tourism’s development to 2030	Visitor attraction potential of the West Coast region	Identifies product gaps; areas needed strengthening; thematic opportunities
Saldanha Bay tourism development plan Phase 3 (2013)	Identifies tourism development potential and opportunities	For SBM	Supports nature and culturally based tourism development, improved institutional development and upgrading of experiences and products. Not clear if ever funded and implemented.
West Coastal National Park plan, 2013-2023	This is a required plan in terms of the National Environmental Management : Protected Areas Act in order to provide a reference for the management and development of the Plan.		There were updates to a number of sections in 2018. A list of management challenges noted in the Park Plan are provided in Figure 7.

Tourism Sector Response Strategy

The national Tourism Sector Response Strategy (to Covid) has eclipsed the National Tourism Sector Strategy. It contains a number of high-level strategic interventions⁵. The strategy is a high-level document without reference to local or district locations or market segments.

Western Cape Tourism Blueprint

The Western Cape Tourism Blueprint 2030, the provincial strategy for tourism, amongst other analysis, includes a comprehensive analysis of what more than 300 000 people have said online about the West Coast District over the duration of one year. Overall, outdoor activities and relaxation and wellness generate the highest volume of online conversations. The main ‘conversation drivers’ were about assets and experiences in the WCDM referred to beaches and shorelines, nature photography and restaurants

Key data for the main attractions and experiences in the WCDM is indicated in Figure 7, which follows. While !Khwattu falls close to the municipal boundary, the West Coast Fossil Park, Buffelsfontein, Thali Thali Game Lodge, and the West Coast National Park fall clearly within SDM boundaries. These are among the main tourist attractions in the district.

Figure 7: Attractions performance in the WCDM

Attraction	% domestic	% international	Opening times	Closed days	Dwell time (hrs)	Full Time Employees	Contract Employees
!Khwattu	75%	25%	09:00 – 17:00	0	3.5	32	10
West Coast Fossil Park	89%	11%	08:00 – 17:00	0	2	15	5
West Coast National Park	n/a	n/a	08:00 – 18:00	0	4	n/a	n/a
Bird Island Lambert's Bay	99%	1%	07:30 – 18:00	0	2	n/a	n/a
Cederberg Wilderness Area	99%	1%	open access	0	8	n/a	n/a
Thali Thali Game Lodge	50%	50%	09:00 – 21:00	0	5	18	2
Buffelsfontein Game Park	30%	70%	08:00 – 17:00	0	3	25	5
Darling Brew	85%	15%	10:00 – 17:00	0	1.5	5	25
Darling Olives	n/a	n/a	09:00 – 16:00	1	1	3	0

* = Admissions data from 2018/2019

Source: Western Cape Government, 2019. Tourism Blueprint 2030

The Western Cape Tourism Blueprint identifies many tourism opportunities available to the West District Municipality and the industry to attract visitors and their money. Priorities identified which are of particular relevance to SBM and this assignment include:

- The sound arterial road system, the R27 and N7 draws visitors to most of the region’s attractions, and can assist in driving geographic spread and broaden the appeal of the district.

⁵ These include Implement norms and standards for safe operation across the tourism value chain to enable safe travel and rebuild traveller confidence; Stimulate domestic demand through targeted initiatives and campaigns; Strengthen the supply-side through resource mobilisation and investment facilitation; Support for the protection of core tourism infrastructure and assets; Execute a global marketing programme to reignite international demand; Integrate regional tourism; and Review the tourism policy to provide enhanced support for sector growth and development.

- The international interest in Wolfgat restaurant can be used to showcase the food from the West Coast. There is an opportunity to leverage off the uniqueness of West Coast hyperlocal food experiences such as rooibos tea, roosterkoek and seafood. The trend is toward local unique food experiences and the region offers a wide range of restaurants to meet this trend (e.g. Strandloper).
- Opportunities exist to invest in an observational experience – that attracts visitors of all ages and is open all year round. This experience could be ideal as a vantage point during the flower season. West Coast National Park and Bird Island would be two sites suitable for this^{liv}.

Tourism in West Coast DM IDP

Within the WCDM IDP, it is noted that the district has the mandate to develop and promote tourism and that municipalities are responsible for leading, managing and planning for development, and responsible for the “Promotion of local tourism for the area of the district municipality”. The WC IDP implementation plan contains a number of areas relating to tourism development and marketing, the main objectives being:

- To empower and enhance the community’s ability to start enterprises
- Tourism product packaging
- Co-operation and collaboration amongst tourism stakeholders
- Marketing, advertising, and communication.

Tourism in the Greater Saldanha Environmental Management Framework

Governing environmental management and impacts is the greater Saldanha Bay Environmental Management Framework 2021, which states that the natural characteristics of the area are seen as an important asset, particularly for the tourism industry.

- Protected areas such as the park, Langebaan Lagoon, and the Berg River Estuary are identified as providing natural areas that serve as important tourist destinations. The West Coast Biosphere Reserve also plays a role in this regard.
- Outdoor activities are recognised as important drawcards for both local residents and visitors, particularly water sports.
- The plan notes comments from local interest groups indicating growth in nature-based tourism to the area, and tourism demand. Furthermore, the rich cultural history of the area is also identified a resource.

6. Tourism and nature: conceptual and practical links

While all life depends on nature’s ecosystem services, tourism activities also usually are reliant on nature-based experiences. These are universally major motivators of travel.

A 2022 World Travel and Tourism Council report, ‘Nature positive travel and tourism’ makes three key points about the linkages between nature and tourism:

1. Globally, over half of Travel & Tourism demand is driven by the desire to explore nature.
2. More than 80% of tourism’s goods and services are highly dependent on nature.

3. Conservation efforts, protected areas, and local economies are fuelled by the presence of visitors and their expenditures.

The point is also made that the tourism sector has a unique opportunity to reverse biodiversity loss as it can educate and raise awareness of travellers, hosts, and employees. At the destination and business level, adopting responsible tourism practices can reduce the impacts of tourists at sites.

Textbox 2: Tourism and Nature

The Business Case for Nature

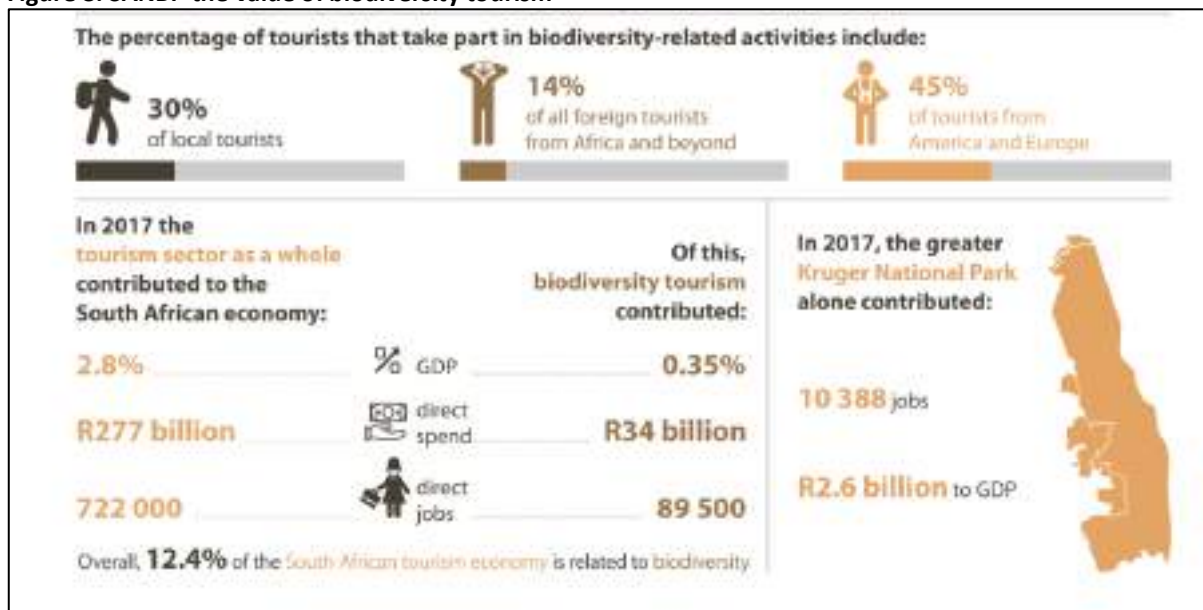
- **More than 80% of the value of Travel & Tourism goods and services is highly dependent on nature** – from the demand for raw materials to the popularity of nature-based tourism.
- **Nature plays an essential role in climate change mitigation and adaptation**, with more biodiverse habitats typically storing more carbon and being more resilient to climate change.
- An Economist Intelligence Unit survey found that **over 90% of people, across the world, are concerned about the loss of animal and plant species.**
- Businesses around the world are likely to be required to assess and disclose impact and dependencies on biodiversity, and report on actions to avoid or minimise harmful practices and to protect biodiversity and restore nature.
- Travel & Tourism businesses are supportive of a Nature Positive agenda but there is limited understanding of the fundamental concepts and what actions are necessary to put a Nature Positive commitment into practice.
- Travel & Tourism should adopt the Nature Positive approach as an integral part of business, working with destination partners and suppliers to halt any exploitation or degradation of the natural world while undertaking and enabling additional actions to restore nature.

Source: World Travel & Tourism Council. 2022. Nature Positive Travel & Tourism.

While the broad business case for the tourism sector as an ally to nature can readily be made, consistent and comparable data does not exist on this relationship. Nonetheless, a number of useful data points exist. These include:

- *Around the world*, Tourism has become a particularly important source of income for protected areas, helping to fund biodiversity conservation. In total, the value of the wildlife safari industry in Africa was estimated at between USD 12.4 billion (direct) and USD 42.9 billion (total) in 2019^{iv}. In South Africa in 2019, SANParks generated 80% of its operating income from tourism^{vi}. This is just the tourism value of biodiversity, and does not account the multiple other values and uses associated with biodiversity, ecosystem services and nature's potential.
- *In South Africa*, tourism is heavily reliant on natural scenery and wildlife^{vi}. Beaches, wildlife and mountains are the top tourism attractions. According to SANBI, in 2017, domestic and international biodiversity visitors collectively spent R34 billion in South Africa, providing 89 500 jobs. (There is no updated data on this figure, but it is likely that similar values are valid today).

Figure 3: SANBI- the value of biodiversity tourism



Source: SANBI, 2018.

- *In the Western Cape*, according to research undertaken by South African Tourism into the activities of foreign tourists in South Africa in 2021, 52,5% of surveyed tourists visited Natural Attractions; 50%, Beaches; 29%, Wildlife; and 34%, Adventure experiences⁶.

Tourism and nature: linkages in the SBM

In the SBM, the West Coast National Park and Langebaan Lagoon are major sites of tourism, recreation, and leisure. According to Conservation International:

'the WCNP is the centrepiece of the ecological biodiversity-driven economy of Saldanha Bay and Langebaan Lagoon. Therefore, managing the lagoon is key to the economy of the area. Without the lagoon and its quality and quantity of water being maintained to support marine life and human activities, the value of the area as a tourist destination and human settlement would be greatly diminished'^{viii}.

Examples of linkages between the tourism destination experience and offering to visitors, and the natural attributes of the area include:

- During flower season, thousands of visitors flock to the area to enjoy the beautiful flowers and colours and spend money not only at the park, but in the broader region. The West Coast National Park is the fifth most-visited national park in South Africa, receiving 250,638 visitors in 2019/2020.
- Kite surfing on Langebaan Lagoon which relies on the water quality of the Lagoon remaining good. The West Coast is recognised as one of the leading kite surfing destinations in the world particularly for new learners or less advanced kites. Catering to this niche market, Langebaan has approximately 10 kitesurfing schools, and an estimated 80 000 lesson hours were estimated for kiteboarding in Cape Town and Langebaan together (in 2018) with an average

⁶ The definitions for these categories are not clear but the overall reliance on natural for experiences is clearly demonstrated.

price of R500 per hour. 70% of these lessons are for visiting foreigners who comprise approximately 15 000 visitors a year^{lix}.

- Many other recreational activities in WCNP and Langebaan lagoon as well as the region are based upon the natural environment and the landscapes and biodiversity of the area. Pollution, invasive alien species, marine and terrestrial biodiversity loss will all threaten the tourism appeal of the SBM. The variety of wildlife is key drawcard for the area. Significant losses will detract from its appeal.

Textbox 3: Kite-surfing data, 2018

- R480 million kitesurfing and windsurfing sector in Cape Town
- >15 000 tourists visit Cape Town annually to kitesurf
- R60 000 – R140 000 average spend of kitesurfing tourists
- +/- 80 000 lessons in Cape Town and Langebaan annually
- 70% of lessons given to tourists
- +/- 1 500 local kitesurfers in the Cape Town area

Source: University of Cape Town, 2019

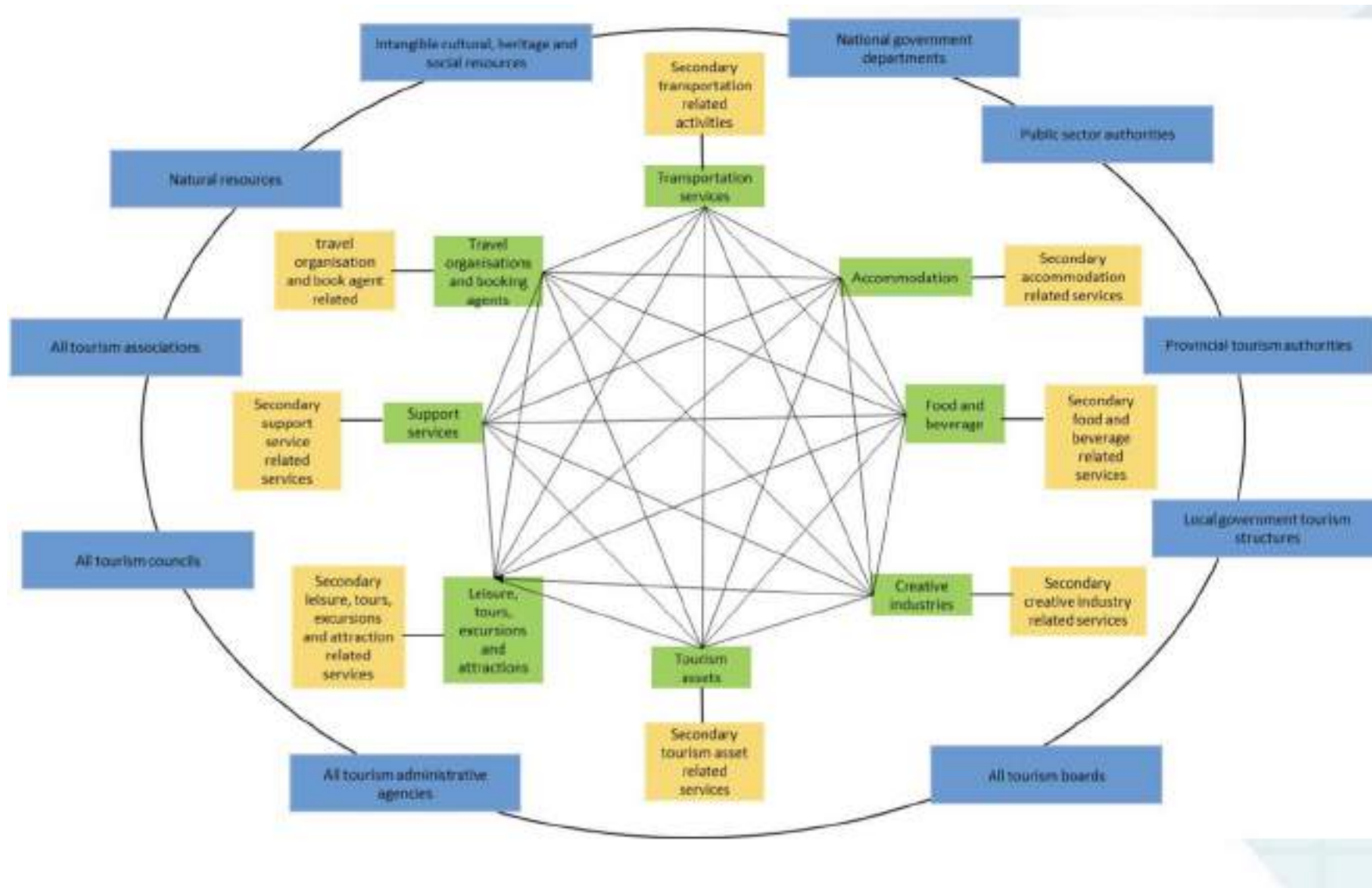
Despite the importance of beaches to tourism in the area, the 2019 draft coastal management plan^{lx} notes that while 2 beaches in SBM once attained Blue Flag status (an eco-label), namely Yzerfontein (2009-2011) and Strandfontein (2012-2015) none now do, due to port, aquaculture, and processing activities that take place along the coastline.

Furthermore, in the case of the SBM, nature and tourism are strongly linked to a rural development objective. In terms of rural tourism and small towns, tourism is often viewed as a tool for building competitive local development. Some of the research into small towns proposes the adoption of sustainable development strategies that emphasise flexibility and greater customisation of products through “economic gardening”, defined as expanding the economy from the inside out through the support of entrepreneurs and small businesses^{lxi}. This has strong parallels with the idea of transition towns and local tourism experiences, innovations, and supply chain development is well-suited and aligned to this approach. The Western Cape Tourism Blueprint 2030 makes this point too, in its proposals regarding ‘hyper local’ experiences based on the unique natural and cultural attributes of the area. Recent research^{lxii} points to the value of rural tourism to:

- Create local income, employment and growth
- Contribute to economic and social infrastructure
- Contribute to local resident amenities and services
- Support conservation of the environment and cultural resources.

Figure 9, over the page, provides a graphic depiction of some of these relationships.

Figure 9: Rural tourism linkages and system



Source: CSIR, Rural tourism, 2022

7. Concluding comments

The IDZ - 'Freeport Saldanha' - is a prominent initiative highlighted in the economic plans of all the spheres of government. At the same time as it is being pursued, nearly all the planetary boundaries of the municipal area have been breached. This could result in escalating negative impacts on residents and also impact destination attractiveness, as well as fishing viability and other nature and biodiversity-based activities and businesses, particularly Tourism. The Socio-Economic Futures report clearly identifies Tourism as the sector with the greatest prospects for development in the area, based on both comparative advantage and multi-criteria decision-making, taking into account resource constraints and risks, opportunities, and threats.

Better and more integrated planning; environmental management capabilities; and enhanced risk frameworks and management is required to manage the impacts of the Freeport now and into the future.

Better assessment of sector linked impacts and trade-offs

- Recent announcements around prospects for green hydrogen, and steel from scrap, indicate that Amsa and Sasol may align themselves with the low-carbon and just transition narratives, irrespective of the local development and environmental impacts of new investments in the SBM area. Understanding actual likely impacts and management of risks and negative effects is critical as these plans are further developed, beyond the announcement stage.
- While Tourism is routinely identified as an important sector in economic plans, and despite its priority status in the Socio-Economic Futures report, it is not as clearly prioritised as the development of the IDZ. Details on the risks to tourism in the area posed by the Port and IDZ are completely absent from current plans. The overall destination and its many SMMEs that rely on the sector for income and employment will be negatively affected if the quality of the natural attractions of the lagoon and West Coast National Park deteriorates due to the new IDZ developments. These effects will be far-reaching.
- Deeper research is required to more fully assess the local jobs likely to be created, the existing skills base, taxes from the various industries, and broader economic impacts on supplier industries.

Updating and aligned plans

Existing district and local tourism plans are outdated. These need to be updated in line with national and provincial priorities. They should have a broader focus than the usual tourism development and marketing strategies: it will be important for these plans to look at risks, linkages with other sectors, critical success factors, biodiversity, climate change, and resourced capabilities. Are there industrial activities incompatible with tourism and its natural asset based in the SBM? If so, these need to be clearly stated.

Capabilities and enforcement

Risk mitigation should be a prioritised area of action for the district municipality. The WCD IDP clearly points to deficiencies in staffing and skills in certain district functions, such as coastal management, climate change mitigation, and adaptation. These areas require a strong and growing set of capabilities with an associated mandate to monitor, manage and enforce certain areas as more industrial impacts are experienced in the area. This is a major concern and risk to the prospects for sustainable development in the area. A similar point related to deficiencies in capabilities is also made regarding the SBIDZ-LC and its internal environmental management activities.

There is a linked opportunity to activate certain commitments made by the SBIDZ to ensure greater environmental responsibility and the prioritisation of the ocean and coastal economy, with the possibility of local skills and local supply chain development. Talk of the green economy and clean energy, as well as environmental responsibility, may amount to little more than lip service if capabilities are not a priority investment area for the Freeport, and municipality as well as the district authority.

There are also few dedicated capacities, particularly at a strategic level, for tourism in the area and this needs to be addressed.

Opportunities for engagement

The provincial GreenCape and the Atlantis IDZ entities are already active in green industry development. They are in close physical proximity to SBM and there may be an opportunity for them to become more involved in the 'greening' of the IDZ and addressing certain risk factors and skills gaps.

In terms of stakeholders, SANParks is a particularly important interested and affected party. The environmental impacts from developments at the port and the IDZ will likely impact the MPA, the broader area, and the national park. A new park management plan is due in 2023, given that the old one was for 2013 – 2023. This presents an opportunity to re-engage SANParks on the state of and risks to ecosystems and biodiversity as well as to jointly prioritise key actions. A full Conservation Development Framework will also be developed for WCNP in the near future^{lxiii}. A reconsideration of buffer zones and activities could allow for a strategic conversation on complementary economic activities adjacent to the park.

Overall, a far more strategic conversation is required at the local, district and provincial level on tourism in the area, its importance to the wider economy, and how best to manage risks for the port's development. The province should be involved in these discussions too.

More generally, as the IDZ plans are a clear priority for the government, it is critically important that residents, tourism stakeholders, environmental organisations, and others have their inputs heard in the various approvals and planning processes such as the EIA that is underway for the first phase of the SBIDZ and the current IDP process of the SBM.

Annexure 1: EMZ4 in the Draft EMF for the Greater Saldanha area.

EMZ 4: INDUSTRIAL ACTIVITY ZONE / SPC: URBAN DEVELOPMENT		
ATTRIBUTE	RATIONALE	COMMENTS/NOTES
Port expansion	<ul style="list-style-type: none"> Port expansion will allow for the development of an oil and gas service facility in the area. 	<ul style="list-style-type: none"> This expansion of the port will contribute largely to the country's GDP and job creation. The port contains a high diversity of species and therefore careful management of biodiversity is needed during the expansion of the port.
Industrial Zoning and Industrial expansion.	<ul style="list-style-type: none"> The expansion of industries in this area has the potential to promote job creation and increased economic growth, in a sustainable manner. To develop a competitive environment to attract foreign and domestic investment within the oil and gas industry. 	<ul style="list-style-type: none"> The IDZ will act as a catalyst to ensure industrial investment thus creating jobs and ensuring sustainable development within the area. Consideration must be made of the cumulative impacts on the marine environment of port expansion.
IDZ PM10	<ul style="list-style-type: none"> PM10 pollution limits the types of development that should be allowed within the area. 	<ul style="list-style-type: none"> Industrial development should aim to concentrate pollution related activities to within the already polluted area to enable more effective management and mitigation.
Undetermined areas	<ul style="list-style-type: none"> Unidentified areas adjacent to the Industrial Activity Zone, that contained no inherent sensitivities, were allocated to this zone. 	<ul style="list-style-type: none"> The allocation of these areas to this zone, allows for increased industrial development to occur. Thus contributing largely to the country's GDP and job creation. By allowing industrial development in these areas,

Source: Draft Greater Saldanha Spatial Development Framework, 2021

References

- ⁱ Hamilton, G. 2022. Weaving a path to a better future. BusinessDay. Available at: <https://www.businesslive.co.za/bd/opinion/2022-12-08-gillian-hamilton-koeksister-economics-weaving-a-path-to-a-better-future/>
- ⁱⁱ Engineering News, 2021. Saldanha Bay IDZ announces R2,5 bn expansion project. Available at <https://www.engineeringnews.co.za/article/saldanha-bay-idz-announces-r35bn-phase-1-expansion-project-2021-05-06>
- ⁱⁱⁱ Independent Online. <https://www.iol.co.za/weekend-argus/news/amsas-plan-to-revive-saldanhas-steel-industry-set-to-create-600-jobs-c7dc0623-4300-40d9-9b78-55bf0e3a023c>
- ^{iv} Makgetla, N. 2021. Learning from Experience: Special Economic Zones in South Africa. Wider Working Paper 2021/ 124.
- ^v Conservation International, 2022. Growing a Sustainable Oceans Economy in South Africa, while expanding Marine Conservation: Lessons from Saldanha Bay.
- ^{vi} Makgetla, N., 2021. Learning from Experience: Special Economic Zones in South Africa. Wider Working Paper 2021/ 124
- ^{vii} The Green Connection, 2022. Doughnut Economics Indicators for Saldanha Bay Municipality. Provided by email.
- ^{viii} Saldanha Bay Municipality. 2011. Saldanha Bay Municipal Spatial Development Framework. Available at: <https://sbm.gov.za/wp-content/uploads/Pages/SDF/6.1-Saldanha-Bay-Whole-Mun-SDF-section.pdf>
- ^{ix} In Le Grange, 2018. Master's Thesis: Regional Spatial Development Framework for Saldanha Bay municipality: pursuing a more ecologically integrated future.
- ^x Ibid
- ^{xi} StratEcon. 2019. Saldanha Bay Municipality- Socio-economic futures. Input into the Integrated Development Plan
- ^{xii} West Coast District Municipality, 2022. Integrated Development Plan 2022 – 2027. May 2022.
- ^{xiii} Extracted from Rogerson, C.M & Rogerson J.M. (2020). COVID-19 and Tourism Spaces of Vulnerability in South Africa. African Journal of Hospitality, Tourism and Leisure, 9(4):382-401. DOI: <https://doi.org/10.46222/ajhtl.19770720-26>. Available at: https://www.ajhtl.com/uploads/7/1/6/3/7163688/article_1_9_4___382-401.pdf
- ^{xiv} Municipal Economic Review and Outlook, 2022/3: West Coast. Available at <https://www.westerncape.gov.za/provincial-treasury/files/atoms/files/West%20Coast%20REPRO%20LR.pdf>
- ^{xv} Western Cape Government Environmental Affairs and Development Planning. 2020. Environmental Management Framework for the Greater Saldanha Area. Available: https://www.westerncape.gov.za/eadp/files/atoms/files/ADOPTED%20AND%20GAZETTED%20GSA%20EMF_%20March%202021_0.pdf

-
- xvi World Travel and Tourism Council, 2022. Nature Positive Travel and Tourism: travelling in harmony with nature. Available at: <https://wttc.org/Portals/0/Documents/Reports/2022/Nature-Positive-Travel-And-Tourism.pdf>
- xvii SANBI, 2016. Biodiversity is a tourism asset. Available here:
<http://opus.sanbi.org/bitstream/20.500.12143/6997/1/Biodiversity%20is%20a%20tourism%20asset%20SANBI%20factsheet%20final.pdf>
- xviii South African Tourism, 2022. Tourism Performance, 2021 Annual report. Available at:
<https://live.southafrica.net/media/298047/sa-tourism-performance-report-2021.pdf?downloadId=402333>
- xix Davidson, V and Tedder, B. 2019. Cape Town's Ocean sports Economy profile. Available: <https://bluecape.co.za/wp-content/uploads/2020/06/Ocean-Sports-Profile-Final-Rev-22-July-2019.pdf>
- xx Hamilton, G. 2022. Weaving a path to a better future. BusinessDay. Available at:
<https://www.businesslive.co.za/bd/opinion/2022-12-08-gillian-hamilton-koeksister-economics-weaving-a-path-to-a-better-future/>
- xxi Municipal Economic Review and Outlook, 2022/3: West Coast. Available at
<https://www.westerncape.gov.za/provincial-treasury/files/atoms/files/West%20Coast%20REPRO%20LR.pdf>
- xxii Saldanha Bay Municipality, 2019. Saldanha Bay Coastal Management Programme, second generation. Available at: <https://sbwqft.org.za/second-generation-coastal-management-programme-2019-2024/>
- xxiii Ibid
- xxiv Saldanha Bay Municipality, 2022. Long Term Financial Plan, For the period 1 July 2022 – 30 June 2032. Available: https://sbm.gov.za/wp-content/uploads/Pages/Financial_Documents/Budget/Budget_2022_2023/Original_Budget_2022_2023/Long-Term-Financial-Plan-for-Saldanha-Bay-municipality-31-May-2022.pdf
- xxv West Coast District Municipality, 2022. Integrated Development Plan 2022 – 2027. May 2022.
- xxvi The Green Connection, 2022. Doughnut Economics Indicators for Saldanha Bay Municipality. Provided by email.
- xxvii Conservation International, 2022. Growing a Sustainable Oceans Economy in South Africa, while expanding Marine Conservation.: Lessons from Saldanha Bay.
- xxviii Le Grange, 2018. Master's Thesis: Regional Spatial Development Framework for Saldanha Bay municipality: pursuing a more ecologically integrated future.
- xxix StratEcon. 2019. Saldanha Bay Municipality- Socio-economic futures. Input into the Integrated Development Plan.
- xxx West Coast DM IDP, 2017 – 2022 review for 2021-2022.
- xxxi Conservation International, 2022. Growing a Sustainable Oceans Economy in South Africa, while expanding Marine Conservation.: Lessons from Saldanha Bay
- xxxii Saldanha Bay Municipality: 4th Generation Integrated Development Plan 2017 – 3rd Amendment

-
- xxxiii Conservation International, 2022. Growing a Sustainable Oceans Economy in South Africa, while expanding Marine Conservation: Lessons from Saldanha Bay.
- xxxiv Makgetla, N., 2021. Learning from Experience: Special Economic Zones in South Africa. Wider Working Paper 2021/ 124
- xxxv ibid
- xxxvi Engineering News, 2021. Saldanha Bay IDZ announces R2,5 bn expansion project. Available at <https://www.engineeringnews.co.za/article/saldanha-bay-idz-announces-r35bn-phase-1-expansion-project-2021-05-06>
- xxxvii Makgetla, N. 2021. Learning from Experience: Special Economic Zones in South Africa. Wider Working Paper 2021/ 124.
- xxxviii <https://www.iol.co.za/weekend-argus/news/amsas-plan-to-revive-saldanhas-steel-industry-set-to-create-600-jobs-c7dc0623-4300-40d9-9b78-55bf0e3a023c>
- xxxix <https://www.news24.com/news24/community-newspaper/weslander/plans-for-green-amsa-20221019>
- xl Bulbulia, T. 2022. Refurbished Saldanha Bay harbour development to benefit local economy, communities – De Lille. Engineering News. Available: <https://www.engineeringnews.co.za/article/refurbished-saldanha-bay-harbour-development-to-benefit-local-economy-communities-de-lille-2022-06-07>
- xli <https://infrastructuresa.org/wp-content/uploads/2022/01/Strategic-Integrated-Projects-July-2020.pdf>
- xlii Stratecon. 2019. Saldanha Bay Municipality- Socio-economic futures. Input into the Integrated Development Plan.
- xliii https://static.pmg.org.za/SAT_ANNUAL_REPORT_2019-20.pdf
- xliv Available here: <https://www.tourismupdate.co.za/article/tourism-fast-highway-recovery-sisulu>
- xlv Statistics SA, 2021. Report-04-05-07 - Tourism Satellite Account for South Africa, final 2017 and provisional 2018 and 2019, 2019 https://www.statssa.gov.za/?page_id=1854&PPN=Report-04-05-07&SCH=73010
- xlvi Ibid
- xlvii World Travel and Tourism Council, 2022. South Africa: 2022 Annual Research: key highlights. www.wttc.org
- xlviii Rogerson, C.M. 2016. Outside the cities: Tourism pathways in South Africa's small towns and rural areas. African Journal of Hospitality, Tourism and Leisure, Special edition. Vol 5(3).
- xlix Glocker and Haxton, 2020. Leveraging tourism development for sustainable and inclusive growth in South Africa. Economics Development working papers no 1621, OECD> [https://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP\(2020\)29&docLanguage=En](https://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP(2020)29&docLanguage=En)
- l Tourism Transformation Council of South Africa, 2021.
- li Available here: <https://www.tourismupdate.co.za/article/tourism-fast-highway-recovery-sisulu>

-
- lii Extracted from Rogerson, C.M & Rogerson J.M. (2020). COVID-19 and Tourism Spaces of Vulnerability in South Africa. *African Journal of Hospitality, Tourism and Leisure*, 9(4):382-401. DOI: <https://doi.org/10.46222/ajhtl.19770720-26>. Available at: https://www.ajhtl.com/uploads/7/1/6/3/7163688/article_1_9_4___382-401.pdf
- liii WESGRO, 2022. Weskus Tourism Visitor Trends, January to June 2022. <https://www.wesgro.co.za/corporate/resources/weskus-tourism-visitor-trends-january-june-2022>
- liv Western Cape Government, 2021. Tourism Blueprint: 2030. Available at: https://www.westerncape.gov.za/assets/departments/economic-development-tourism/dedat_tourism_blueprint_report_final_draft_pdf.pdf
- lv UNWTO, 2020d in Snyman, S et al., 2021.. State of the Wildlife Economy in Africa, ALU School of Conservation.
- lvi SANParks Annual report, 2020/21. Available: <https://www.sanparks.org/assets/docs/general/annual-report-2021.pdf>
- lvii SANBI, 2016. Biodiversity is a tourism asset. Available here: <http://opus.sanbi.org/bitstream/20.500.12143/6997/1/Biodiversity%20is%20a%20tourism%20asset%20SANBI%20factsheet%20final.pdf>
- lviii Conservation International, 2022. Growing a Sustainable Oceans Economy in South Africa, while expanding Marine Conservation.: Lessons from Saldanha Bay.
- lix Davidson, V and Tedder, B. 2019. Cape Town's Ocean sports Economy profile. Available: <https://blue-cape.co.za/wp-content/uploads/2020/06/Ocean-Sports-Profile-Final-Rev-22-July-2019.pdf>
- lx Saldanha Bay Municipality, 2019. Second Generation Coastal management programme: 2019 – 2024. Available at: <https://sbwqft.org.za/second-generation-coastal-management-programme-2019-2024/>
- lxi Rogerson, 2014. *African Journal of Hospitality, Tourism and Leisure SPECIAL EDITION Vol. 5 (3) - (2016)*
- lxii CSIR, Rural tourism presentation. 2022. Available: https://www.tourism.gov.za/CurrentProjects/2022_Research_Seminar/Documents/CSIR_TRansformation%20of%20the%20South%20African%20tourism%20value%20chain%20toward%20sustainable,%20resource%20effecient%20and%20inclusive%20growth%20path.pdf
- lxiii According to the Western Cape Government: Environmental Affairs and Development Planning's Draft Environmental Planning Framework for the Greater Saldanha area. March 2021.