



## Interim Report KAZA “Sustainable Lodges”



### Summary of Project Phase I (Milestones 1-3)

## **Milestone 1: Analysis of the current situation regarding sustainable accommodation (“sustainable lodges”) in Southern Africa**

The activities of Milestone 1 were carried out through a combination of desk research and consultations with relevant stakeholders. These included national tourism boards, private tour operators as well as the WWF Namibia. Furthermore, reports and other documentary on tourism and tourism plans in KAZA were reviewed. The main methodology was an analysis of the websites of the national tourism boards of Botswana, Namibia, Zambia and Zimbabwe as well as a review of the websites and criteria of the organisations offering certification systems and standards.

### **Task 1: Inventory and analysis of existing sustainability standards and certification systems for accommodation in Southern Africa**

Six sustainability or environmental labels for tourism accommodation were identified that are currently present in Southern Africa. These are:

- Botswana Ecotourism Certification System
- EcoAwards Namibia
- Fair Trade Tourism, South Africa
- Heritage Environmental Rating Programme / Green Line Responsible Tourism Certification, South Africa
- Green Leaf Eco Standard, South Africa
- Global Ecosphere Retreats (The Long Run Initiative), Kenya

Of these, the following are active in the KAZA area:

- Eco Awards Namibia: 4 certified accommodation businesses and another 4 in the assessment process
- Botswana Ecotourism Certification: 20 certified lodges and 13 that are currently in the assessment process
- Global Ecosphere Retreats: two certified properties in Botswana and one in Zambia

Thus, certification of sustainable accommodation presently plays a role in only three of five KAZA countries. Botswana has by far the most certified accommodations, followed by Namibia, which also has a great number of certified businesses overall, but not in KAZA.

Furthermore, &Beyond and Wilderness Safaris are two of the leading and well renowned ecotourism operators in Southern Africa, who also operate several lodges in the KAZA area. Thus, their own company sustainability standards were considered in addition to the independent certification systems.

Finally, Travelife, the international certification system for hotels and other forms of accommodation, was included in the analysis as it is a standard which is used by a number of international tour operators, among them Thomas Cook. However, Travelife does not currently have any certified businesses in Southern Africa.

## Task 2: Assessment of relevant standards against the GSTC criteria, the goals of Futouris and those of the KAZA TFCA

With the exception of the Heritage Environmental Rating Programme (which focusses on large city hotels) and the Green Leaf Eco Standard (which does not provide clear information on its programme), each standard was analysed against a set of criteria. These were mostly derived from the Global Sustainable Tourism Criteria (GSTC), which are an internationally agreed upon minimum standard that businesses and destinations should achieve in order to achieve social, environmental, cultural, and economic sustainability. A special emphasis was put on community benefits and local supply chains as these are especially important to the KAZA management, in conjunction with biodiversity conservation. Furthermore, quality management was included as a criterion to make sure that certified businesses can also provide high quality experiences for visitors. Futouris' main goals of biodiversity conservation, climate protection and poverty alleviation fit very well into the overall picture.

Finally, it is important that sustainability standards also involve the trustworthiness of the certification process itself. Therefore, the following process-related criteria were applied:

- Transparency
- Verification/audit process
- Levels of certification
- Validity period of the certificate
- Recognition (or not) by the Global Sustainable Tourism Council

Of the company standards, Wilderness Safaris was evaluated based on its "Sustainability Review 2014" brochure. &beyond declined to make its standard public.

The following chart summarizes the analysis of the five schemes and the sustainability management efforts of Wilderness Safaris with regard to their contents:

Criteria	Botswana Ecotourism Certification	Eco Awards Namibia	Fair Trade Tourism	The Long Run Initiative	Travelife	Wilderness Safaris
Sustainable management	(●)	(●)	•	•	(●)	•
Socio-economic benefits	•	(●)	••	•	•	••
Cultural heritage	(●)	(●)	•	(●)	(●)	•
Environmental sustainability	••	••	(●)	•	(●)	•
Community benefits	•	(●)	••	••	•	••
Quality management	•	(●)	•	•	(●)	•
Local supply chains	•	(●)	•	•	•	•

•• = very detailed, • = well covered, (●) = basic coverage

The following chart shows the process-related comparison of the systems and the evaluation of their rigorousness and requirements in different areas:

	Botswana Ecotourism Certification	Eco Awards Namibia	Fair Trade Tourism	The Long Run Initiative	Travelife
<b>Levels</b>	3	5	-	3	2
<b>Scores &amp; Weighting</b>	1 point per criterion, most mandatory points to receive for "management" and "tour execution"	One point per criterion, no weighting except from distribution of points (most to be scored in sections "water" and "waste")	Mandatory criteria + general criteria of which 75% must be complied with	Scores scale from 0 – 4; no information on weighting available	116 of 150 criteria are mandatory; no weighting
<b>Transparency</b>	Standard published	Standard published	Standard published	Standard published	Standard published
<b>Verification</b>	On-site 2 <sup>nd</sup> party	On-site 3 <sup>rd</sup> party	On-site 3 <sup>rd</sup> party	On-site 3 <sup>rd</sup> party	On-site 3 <sup>rd</sup> party
<b>Validity</b>	2 years	2 years	3 years	6 years	2 years

The assessment showed that whereas ecological issues are comprehensively and thoroughly covered by Botswana Ecotourism and Eco Awards Namibia, socio-economic criteria are underrepresented. Botswana Ecotourism is based on a three-tiered model with certification levels ranging from *Green* to *Green+* and *Ecotourism*. Compliance with social aspects is largely required to get a *Green+* or *Ecotourism* certificate. Botswana Ecotourism has received preparatory training by the GSTC in order to be able to comply with the GSTC standard in the near future.

At the time of evaluation Eco Awards Namibia only had rudimentary social criteria. This has recently been changed substantially. The new, more demanding sustainability standard has already been used for incoming agencies and is soon to be applied for accommodation. In order to facilitate entry into the system, the organisation grants five levels of certification (one to five "desert flowers"), which range from a minimum of 40% of compliance (one flower) to a minimum of 90% to receive five flowers.

Fair Trade Tourism (FTT) and The Long Run Initiative (Global Ecosphere Retreats) are most demanding in terms of social benefits. FTT is a pioneering sustainable tourism certification scheme in Southern Africa and the first one to receive GSTC recognition. The Global Ecosphere Retreats scheme was also recently recognized by the GSTC, thus confirming that all four dimensions of sustainability (including managerial) have been adequately covered. This is also the case with Travelife for hotels, even though it seems that the standard is somewhat less rigorous than the two others.

The company standard of Wilderness Safaris (WS) is comprehensive and of a very high quality, but lacks, in itself, independent verification of individual lodges' actual sustainability performance. However, many WS properties in Botswana and Namibia have also been certified by the respective national certification schemes.

In terms of transparency all analysed schemes have published their standard and set of criteria. Regarding verification, all five (with the exception of Botswana Ecotourism) use external (3<sup>rd</sup> party) auditors. Among the analysed Southern African certification systems Botswana Ecotourism is the only one managed by a governmental organization, the Botswana Tourism Organisation. Eco-awards

Namibia is operated by a broad alliance consisting of private sector associations, government agencies and NGOs. FTT is an NGO. Finally, Global Ecosphere Retreats is managed by a private foundation, the Zeitz Foundation.

### **Task 3: Development of recommendations for an adequate standard for this project**

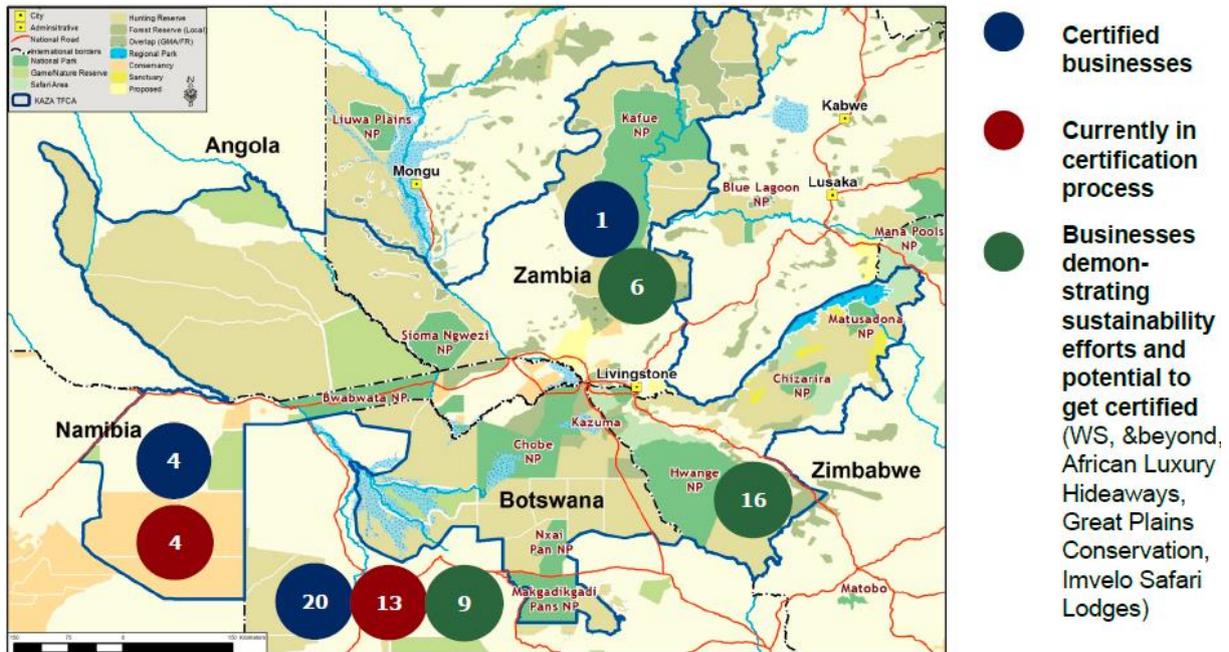
The previous analysis shows that all four certification systems present in the region cover the major sustainability sets of criteria, most notably environmental sustainability (biodiversity and resource conservation) and socio-economic benefits (especially in relation to the local economy), albeit to varying degrees. Quality assurance – an important prerequisite for the marketability of products – is also present in all of the schemes. Transparency and independent verification are also granted, with the exception of exclusive company standards. As was later confirmed during the two stakeholder workshops in Germany and Victoria Falls (see Milestones 2 and 3), independent verification must be an indispensable component of any sustainability standard.

GSTC recognition would automatically qualify a certification scheme for the project. A challenge for the Sustainable Lodges project is that those two systems that have actually achieved this international recognition are hardly present in the KAZA region. FTT is currently negotiating with the tourism authorities of Zimbabwe and Zambia to “export” their system to those countries. Botswana Ecotourism and Eco-awards Namibia are not (yet) GSTC-recognized and they do have some weaknesses, but they are nevertheless good systems and enjoy broad support in their respective countries. It is therefore suggested that properties certified by them will be recognized as representing Sustainable Lodges, perhaps with the exception of their lowest certification levels (“Green” in Botswana; only one or two “desert flowers” in Namibia). This needs to be clarified in the next project phase.

### **Task 4: Identification and short description (location, type of business and offers) of certified businesses (or those with a sustainability management system) in the KAZA area**

In order to get an overview of lodges in the KAZA area that are certified by any of the systems described previously or that otherwise show some visible commitment to sustainable development, an inventory based on a web analysis was compiled. The web analysis covered the websites of the national tourism boards (accommodation section) as well as the member lists of the certification systems.

The following map gives an overview of the number of certified accommodation businesses (or those currently in the process of getting certified) in the KAZA countries. As there is a strong focus on Botswana, and most notably the Okavango Delta, and a very sparse presence of certified lodges in other parts of KAZA, it was decided to widen the inventory and also include lodges run by companies that show some commitment to sustainability on their websites and thus hold a potential to become certified in the near future. This inclusion was by no means systematic, thorough or comprehensive, but provided at least a certain orientation of where to look for lodges that could be included in the projects, provided that they agree to get certified. Most of these lodges are subsidiaries of larger, international safari companies such as Wilderness Safaris, & beyond or Imvelo Safari Lodges.



In total, 69 businesses were identified, of which 25 are certified and 13 are currently in the certification process. 31 show some sustainability efforts. Apart from the Okavango Delta, most of the lodges are located in key tourism areas: Zambezi province of Namibia, Chobe National Park (Botswana), Hwange NLP (Zimbabwe) as well as Victoria Falls and surroundings. A few lodges with some sustainability commitment can be found in the northern part of KAZA in Zambia (Kafue NLP) and in the Northeast in the Lake Kariba area (Zimbabwe). There is no visibly sustainable accommodation in Angola.

The main type of accommodation are tented camps or lodges that are small to medium-sized, providing an average of 5 to 10 rooms. Most lodges provide fully inclusive packages including accommodation, meals and activities. Safaris (game drives or sometimes walking safaris) and water-based activities (boat cruises) are typical activities. Some cultural activities are being offered as well, but these tend to be an add-on to the predominant wildlife safaris. Botswana in particular (but also Zambia to a certain degree) is a high-end tourism destination dominated by 4 and 5-star establishments. Lodges in Namibia tend to cater more to mid-market segments.

It is notable that sustainability certificates are hardly published on the websites of the businesses, even though these companies do state that they are committed to sustainable development. In the communication there is a strong focus on conservation-related activities, followed by social activities that are to benefit local communities.

All identified businesses were contacted by e-mail and informed about the Futouris project and their opportunities in participating in the project. Furthermore, they were invited to the joint presentation of the project with the Namibia Tourism Board and the KAZA Secretariat during the Namibia Tourism Expo in Windhoek on June 12, 2015. The list was also made available to the KAZA Secretariat.

## **Milestone 2: Inventory/analysis of the suitability of Futouris members & other TOs (regarding types of products & destinations offered) as well as their willingness to actively participate in the KAZA project**

### **Tasks 1:**

**Analysis of the product and destination portfolios of Futouris member companies (tour operators and travel agencies offering wildlife and cultural tourism in Southern/Eastern Africa)**

**Comparison of potentially matching offers with attractions/services offered in the KAZA area and identification of potential Futouris member companies that could play a role in the project**

**Approach:** In a first step suitable Futouris members were identified on the basis of their expressions of interest to participate in the KAZA project and their business involvement in the region. The members were scrutinized with regard to their destination portfolios and sustainability visions in general and then more specifically in relation to their work and product portfolios in Southern Africa, more precisely in the KAZA countries. The product portfolios (itineraries and modules) in the KAZA countries were studied on the basis of current online/print catalogues and price lists (Nov 2014-October 2015), as well as websites. Thereby the itineraries were analysed, together with the featured accommodations. The accommodations (hotels, camp sites, lodges) featured in the catalogues of the Futouris tour operators were entered into a database and listed according to the activities they offer (e.g. safaris, cultural excursions etc.), the size of accommodation (number of beds), price, star category and sustainability efforts (certified or other). The information was mostly taken from the websites of the lodges. As many lodges only have a limited internet presence, it was not always possible to obtain prices and information about the sustainability commitment of the lodges. The featured lodges were mapped in the KAZA area with regards to their location in/ or close to a protected area within KAZA. Certified Futouris partners were visualised on a separate map.

**Results:** Jointly with the Futouris management the decision was made to focus on **TUI, Thomas Cook, Gebeco and Green Pearls**<sup>1</sup> as close partners for the Sustainable Lodges project. TUI, Thomas Cook and Gebeco offer a total of 20 tours (round trips) along the tourism hotspots of the KAZA region (focus on Okavango, Chobe, Victoria Falls), together with different individual modules (activities and lodges). It was found that: over 100 lodges are featured by the tour operators in KAZA countries, of which roundabout 60 lodges are situated in the KAZA region. 20% of these lodges are certified or show sustainability efforts (for all results please see attachment 1 – Futouris portfolios). Green Pearls does not feature any properties in the KAZA countries yet, but plans to expand its portfolio with Sustainable Lodges.

**Task 2: Contacting and interviewing potentially qualifying Futouris member companies regarding the integration of “Sustainable Lodges” into their existing product portfolio**

**Approach:** In the next step the Futouris member companies were contacted and interviews were scheduled. A questionnaire was developed (see attachment 2), which was sent to the interviewees prior to the talk.

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<sup>1</sup>Der Touristik was accepted as a new Futouris member in September 2015 and will be actively approached in the second phase of the Sustainable Lodges project.

TO	Name	Position	Form of contact
<b>TUI</b>	<b>Martina Horter</b>	Senior Product Manager Afrika	interview
<b>TUI</b>	<b>Luisa Wolter</b>	CSR manager	email
<b>Green Pearls</b>	<b>Stefany Assmann-Staudt</b>	Managing director	interview
<b>Thomas Cook</b>	<b>Claudia Schulze</b>	Product manager, Southern Africa	interview
<b>Thomas Cook</b>	<b>Friederike Grupp</b>	CSR manager	email
<b>Thomas Cook</b>	<b>Swantje Lehnert</b>	Former CSR manager	interview
<b>Gebeco</b>	<b>Kirsten Hulvershorn</b>	Product manager Africa Gebeco	interview

The interviews lasted approximately 30-40 minutes and addressed the offer/ demand for products in KAZA, the significance of sustainability for trips to the KAZA region, the application of standards and the general interest in participating in the Sustainable Lodges project.

**Results:** The interviewees confirmed their motivation to actively support the project (for more detailed information on the replies see attachment 1). It can be said that generally the product managers spoke very favourably about the potential of the KAZA region, although as such it is not a major destination in terms of actual tourist bookings. However the potential is clear and the product managers, especially from TUI and Gebeco seemed very open for cooperation and sharing their ideas among each other.

### **Task 3: Analyse product portfolios of international affiliated companies of Futouris members and selected non Futouris members and contact/interview potentially qualifying ones.**

**Approach:** Additionally to the Futouris members, the list of members of the Travel Foundation was assessed in order to pinpoint tour operators which are active in the KAZA region. Expert Africa, Virgin Holidays, Hayes & Jarvis, Thomas Cook UK, Explore! and Travelmatters were identified and their respective product portfolios in the KAZA region were assessed. It was found that compared to the German operators, the Travel Foundation members feature Botswana as the most popular country on offer, with a large proportion of camps and higher average prices for round trips. Approximately 50 lodges and 110 camps are featured in the KAZA region. Practically all sustainable lodges in KAZA (list based on our research) are part of Travel Foundation members' product portfolios.

Graeme Jackson, Head of Partnerships of the Travel Foundation, was contacted and informed about the Sustainable Lodges project. He passed the relevant information on to the respective partners. However, despite several follow-up attempts, no further feedback or expressions of interest to join the project were received. All 6 identified Travel Foundation members operating in KAZA were contacted directly and invited to the stakeholder workshop in Victoria Falls. Nick Wilson, Destination Manager - Indian Sub-Continent, East/Southern Africa & Latin America for Hayes & Jarvis put us in touch with their local DMC (Followme2Africa), who were also invited to the workshop, but did not respond to the invitation.

**Results:** It is concluded that, due to the limited scope and time frame of the project and the hesitant reaction of the UK operators, the focus should be put on the Futouris members for the second phase, and this even more so, considering the fact that DER Touristik recently joined as a Futouris member. As the German operator with the largest product portfolio in Southern Africa, DER Touristik already offers sustainable/certified trips to some extent and would be an ideal additional partner for the project, as it already enjoys a positive reputation in the KAZA region.

#### Task 4: Preparing, conducting and documenting a one-day stakeholder workshop in Germany (on project standard and tours/products in KAZA)

**Approach:** The one-day stakeholder workshop was held on July 14<sup>th</sup> in Hannover and brought together all relevant actors from TUI, Gebeco and Green Pearls. Unfortunately Ms. Schulze, the product manager of Thomas Cook, could not attend the workshop. Therefore a telephone briefing was conducted after the workshop. The workshop discussion was very vivid and attendees agreed upon the proposed project standard and certification systems/ standards, presented by Wolfgang Strasdas. In a second step, the workshop discussed the development of Sustainable Lodges roundtrips and packages, with the attendees agreeing upon the following model:

##### 1. Existing itineraries:

- Non-certified lodges: sensitize lodges which are already part of product portfolio/ convince them to get certified
- Certified lodges: Add them to itineraries, possibly in exchange for non-certified lodges not willing to participate

##### 2. Add-on lodges:

Admission of sustainable lodges as individual add-on option to a trip, with the possibility of a special label/ preferred placement in catalogue

##### 3. FIT (Free independent traveller):

Possibility to choose sustainable lodges plus activities on a FIT basis (but booked through a tour operator)

**Results:** Overall attendees emphasized that there is not so much the need to create new itineraries but to work and optimize existing ones to include more sustainable lodges. Also the increase in individual package bookings (FIT) was seen as a positive development to offer sustainable lodges as add-on options or individual travel modules. Attendees agreed upon participating in a joint KAZA Sustainable Lodges ITB event 2016 and predicted that the first Sustainable Lodges could make it into the catalogues by the end of 2016.

#### Task 5: Communicating the agreed upon draft standard as a basis for further discussion to KAZA stakeholders

**Approach:** Following the Hannover-workshop, all necessary documentation was sent to the workshop attendees (workshop report, list of sustainable accommodation in KAZA, maps and list of non-certified Futouris partners in KAZA). As jointly discussed in Hannover, the incoming agencies are key strategic partners in the region and were therefore invited to the KAZA Stakeholder Workshop in Victoria Falls.

**Results:** Representatives from ATC and Thompsons attended the Vic Falls workshop and the person in charge from Südafrika Hautnah replied favourably with prospects of a future cooperation.

Incoming Agency	Name	Position
African Travel Concept (ATC), partner of TUI & Gebeco	<b>Anita Streich</b>	Managing director
Wilderness Safaris Zimbabwe – Thompsons, partner of Thomas Cook	<b>Moses Nyamasoka</b>	Representative
Südafrika Hautnah, partner of Green Pearls	<b>Birgit Bergener</b>	Managing director

### Milestone 3:

#### **Task 1: Preparation, implementation and documentation of an information workshop at the Windhoek Tourism Expo 2015**

The Windhoek Tourism Expo was used to introduce the Futouris Sustainable Lodges project to a broader professional tourism audience from Namibia and its neighbouring countries. The information event on 12 June was organized in cooperation with the Namibia Tourism Board and PMTC Consultants (working on tourism development on behalf of the KAZA Secretariat).

Apart from that, several talks with actual and potential project partners were conducted. The most important one was with Edward Humphrey of PMTC Consultants who also acts as the coordinating procurement officer for the KAZA Secretariat and thus has some influence on how the Secretariat spends its budget. It was agreed that the KAZA Secretariat would indeed fund the stakeholder workshop that would eventually take place in Victoria Falls in September (see following chapter). At the occasion of the information event Mr. Givemore Chidzidzi of the Zimbabwe Tourism Authority offered to host the workshop in Victoria Falls.

Another important tourism stakeholder in KAZA is the World Wildlife Fund (WWF) Namibia for the development of a sustainable tourism in KAZA. The WWF is currently working on a comprehensive tourism inventory in KAZA (location and types of lodges, transport infrastructure, etc.). An important aspect of this project is to develop new tourism routes away from the current tourism hotspots that are to strengthen so-called Wildlife Dispersal Areas (WDAs) and the wildlife migration corridors between them. The WWF project offers potential synergies with the Futouris project.

Furthermore, a memorandum of understanding was prepared (and later signed) between Futouris and the South African certification organization Fair Trade Tourism (FTT), based in Pretoria. FTT intends to train and advise lodges in Zimbabwe and Zambia that are interested in getting certified. A similar, but more informal agreement was concluded with EcoAwards Namibia.

#### **Task 2: Conceptualization, implementation and documentation of a one-day workshop in the KAZA area (objectives: discussion of, and decision on, the “Sustainable Lodges” standard; identification of organization(s) to manage the standard; identification of at least 10 lodges committed to participating in the project)**

**Approach:** Invitation management was coordinated jointly with the KAZA secretariat. A focus was on inviting the relevant incoming agencies and contacting other private sector actors (e.g. Gondwana lodges, individual properties which are already part of Futouris partner portfolios). The workshop combined information on the various tourism activities in KAZA with a participatory approach that intended to

- a) develop a common understanding of what a Sustainable Lodge should be like (discussion/elaboration of key criteria)
- b) get an orientation for planning the next project phase.

**Results:** A successful one and a half day event was hosted in Victoria Falls with a diverse group of attendees from the KAZA ministries, NGOs, certification organisations, the KAZA Secretariat and most importantly from the private sector (tourism associations, incoming agencies and lodge owners). The detailed results of the workshop can be found in attachment 3.

Regarding the standard for sustainable lodges, the strong focus on local community development and community relations that is already expressed in the management objectives of the KAZA Secretariat was confirmed by the working group participants. Staff qualification and retention was also emphasised. Secondly, biodiversity conservation (e.g. by actively preventing poaching) received a high ranking as wildlife is the prime tourism resource of the KAZA area. Overall, the workshop participants confirmed the recommendations elaborated by the Futouris consultants (see Milestone 1) and endorsed by the Futouris member companies at the Hannover workshop, including the insistence on transparency and independent verification.

The presentation by Netsai Sibanda of the Sustainable Tourism Certification Alliance Africa clearly showed that the criteria developed by "The Alliance" for Southern and Eastern Africa matched those elaborated by workshop participants, including its strong focus on social issues. The Alliance is currently negotiating with the KAZA Secretariat to achieve a formal recognition of its standard by the latter as a guidance for sustainable tourism development in KAZA. Nevertheless, there appears to be a strong desire to also have national standards or certification systems. This hampers FTTs planned expansion into Zimbabwe where some important stakeholders are planning on its own national system, a process that will most likely take a year or much more. In addition, Zambia's tourism authority seems to be inactive at the moment regarding a sustainable tourism standard.

The situation in both countries represents a challenge for the Futouris project as certification of Sustainable Lodges has become unlikely in the near future. Additional certification will be easier in Botswana and Namibia, but here as well it is questionable whether the entire process can be completed in just a few months (that is, in time for ITB 2016). This means that it will probably be necessary to develop some sort of a preliminary solution that would mark lodges that are on their way to sustainability certification as "in transition" or the like. The concrete solution to this challenge needs to be discussed with relevant stakeholders in Phase 2 of the project.

Overall, however, the workshop confirmed the possibilities for integrating sustainable lodges into Futouris product portfolios (existing itineraries, add-on lodges, FIT), but also brainstormed on two new potential routes, which should encompass two areas of KAZA which are less developed but full of potential in regards to their strategic location close to Wildlife Dispersal Areas and available touristic infrastructure. It was agreed together with the WWF representative Clive Poultney and the incoming agencies that these two routes should be developed in close cooperation.

Four companies present at the workshop have expressed their interest in getting involved in the project: Victoria Falls Hotel (one of the biggest in town), Imvelo Safari Lodges (6 lodges in Victoria Falls and Hwange National Park, Zimbabwe), Pangolin Photo Safaris (operating a houseboat in Chobe National Park, Botswana) and Ndhovu Safari Lodge (in the Namibian part of KAZA).

**Conclusion Phase I:** It can be said that the first phase confirmed the vast tourism potential of the KAZA area, a destination still rather unknown to German travellers, hosting internationally renowned major icons such as the Okavango Delta and Victoria Falls, as well as stunning wildlife. Many of the lodges operating in the KAZA region are per se already sustainable, as they operate in deep synergy with the surrounding nature and wildlife. However, many lodge owners have so far not been convinced of certification (mainly due to perceived cost), but wish to gain access and an understanding of the German market. The Sustainable Lodges project offers an ideal way to combine certification with the incentive of market access. During the KAZA workshop in Victoria Falls the Futouris incoming agencies in the region (particularly ATC) emphasized their interest and commitment to the project and will be our primary focal points for the second phase. Together with

the expertise of the WWF in regards to the Wildlife Dispersal Areas, we aim to develop two unique and new route options for the consideration of the Futouris product managers. These routes can also be divided into individual modules for the FIT market. In addition to itinerary development, individual properties will be contacted for certification and inclusion into the Sustainable Lodges project. We have identified approx. 50 lodges, which are part of Futouris member portfolios, but not yet certified. Furthermore we have received several expressions of interest from private sector workshop attendees in Victoria Falls. The tight timeframe until ITB 2016, as a major milestone for presenting preliminary results and commitment to the industry, urges us to proceed as soon as possible with the second phase and in liaising with the different project partners. As the communication and exchange with TUI and Gebeco has been very productive, the immediate focus should be on convincing Thomas Cook of a more active participation and gaining DER Touristik as an additional partner for the project.

However, as mentioned above, the certification of additional lodges will be a challenge, given the tight timeframe of the Futouris project and the slow pace of processes in a multinational Southern African context that involves a large number of stakeholders. However, we are confident that we can find a workable solution with the certification organisations, which would most likely be based on a preliminary assessment of lodges that show a clear commitment to sustainability and that can convincingly be seen as "in transition" to certification.

**Annex:**

- 1. Presentation: Futouris Portfolios**
- 2. Questionnaire: Interview with Futouris members**
- 3. Report: KAZA Stakeholder Workshop Victoria Falls**