

NOTE

***** Pages 343 - 741 attached hereto should be read with Items 9.3.1 to 9.3.2 respectively of the agenda of the monthly meeting of the Municipal Council of Windhoek, to be held on Thursday, 27 October 2022 at 17:30, in the new Council Chambers, Windhoek.**

Compiled by: Ms MF Gous

Windhoek Economic Development Strategy 2022 -2027

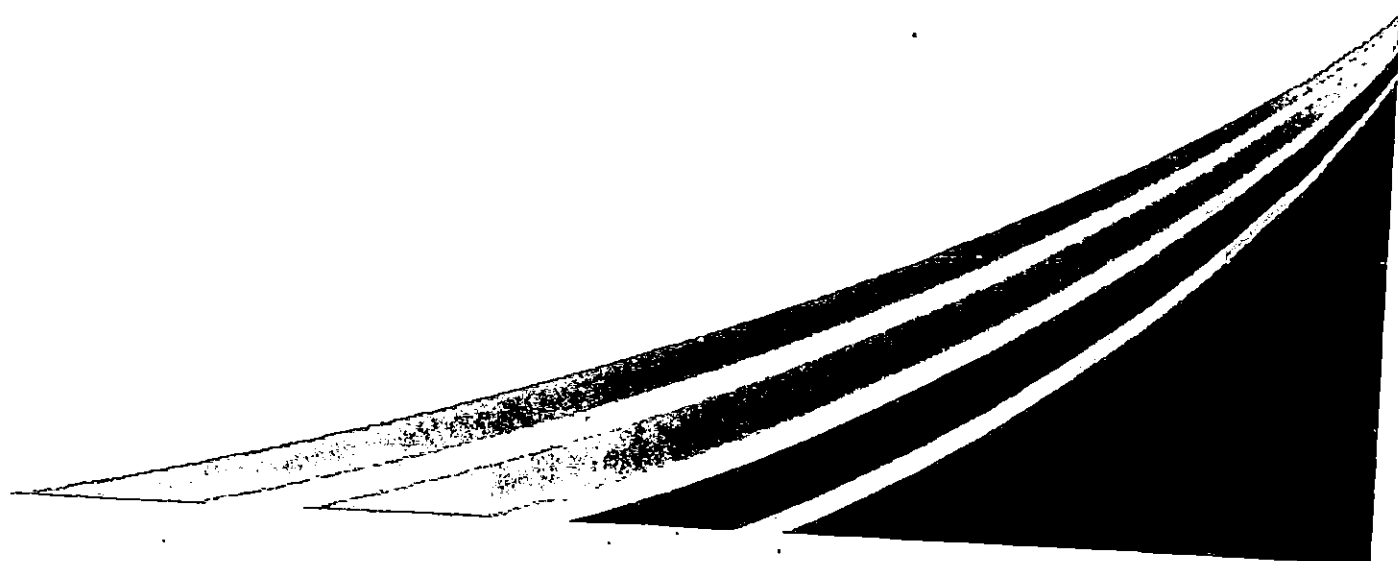


Table of Contents

1. Executive Summary.....	1
1.1. Purpose of the Study	1
1.2. Key Benefit of the WED Strategy	1
1.3. Status Quo	3
1.4. Key Issues	5
1.5. WED Strategic Framework	6
1.6. Strategic Intervention: Agriculture and Agro-Processing.....	8
1.7. Strategic Intervention: Transport and Logistics	10
1.8. Strategic Intervention: Tourism.....	13
1.9. Strategic Intervention: Micro, Small and Medium Enterprises (MSME)	16
1.10. Strategic Intervention: Informal Sector	19
1.11. Strategic Intervention: Social Development	21
1.12. Strategic Intervention: Create an Enabling Environment	21
1.13. WED-Implementation Plan and Monitoring and Evaluation Framework.....	22
1.14. Monitoring and Evaluation.....	23
2. Introduction.....	23
2.1. Purpose of the Studies.....	24
2.2. Study Location.....	27
2.3. Study Methodology	27
2.4. Document Structure	27
2.4.1. Strategy.....	28
3. Summary of Status Quo	28
3.1. Policy Framework	28
3.2. Key Issues	28
3.2.1. In-Migration	29
3.2.2. Water Security	30
3.2.3. Food Security	30
3.2.4. Housing	30
3.2.5. Budget constraints	30
3.2.6. Transportation	32
3.2.7. Information and Telecommunications	33
3.2.8. Education Levels.....	33
3.2.9. Tourism	33
3.3. Sectoral Comparative Analysis	36
4. WED Strategic Framework	40
4.1. Strategic Intervention: Agriculture and Agro-Processing.....	40
4.1.1. Objective of the Strategic Intervention.....	40
4.1.2. Factors Influencing Agriculture and Agro-Processing	41
4.1.3. Introduction	42
4.1.4. Food Security	42
4.1.5. Water and Land Resources	43
4.1.6. Agriculture and Agro-Processing Stakeholders Engagement	44
4.1.7. Agricultural Produce.....	44

4.1.8.	Fresh Produce Business Hub (FPBH).....	52
4.1.9.	Agriculture and Agro-Processing Programmes and Projects	54
4.1.10.	Spatial Analysis	54
4.1.11.	High-Level Bulk Infrastructure Assessment.....	56
4.1.12.	Strategic Intervention Outcome	58
4.2.	Strategic Intervention: Transport and Logistics	59
4.2.1.	Objective of the Strategic Intervention.....	59
4.2.2.	Factors Influencing Transport and Logistics Development	59
4.2.3.	Introduction	60
4.2.4.	Windhoek's Comparative Advantage in Transport and Logistics.....	60
4.2.5.	Current and Future Transport and Logistics Infrastructure	61
4.2.6.	Logistics Support Structures	61
4.2.7.	Local Transport System.....	61
4.2.8.	Non-Motorised transport.....	61
4.2.9.	Transport and Logistics Programmes and Projects.....	62
4.2.10.	Spatial Analysis	62
4.2.11.	High-Level Bulk Infrastructure Assessment.....	64
4.2.12.	Strategic Intervention Outcomes	65
4.3.	Strategic Intervention: Tourism.....	66
4.3.1.	Objective of the Strategic Intervention.....	66
4.3.2.	Factors that Influence Tourism.....	66
4.3.3.	Introduction	67
4.3.4.	Tourism System	69
4.3.5.	Windhoek as a Tourist Attraction.....	69
4.3.6.	Tourism Distribution Channels and Marketing	72
4.3.7.	Transportation Infrastructure.....	74
4.3.8.	Support Services.....	74
4.3.9.	Accommodation	75
4.3.10.	Hospitality.....	75
4.3.11.	Tourism Entities and Forums	75
4.3.12.	Tourism Programmes and Projects	76
4.3.13.	Spatial Analysis	76
4.3.14.	High-Level Bulk Infrastructure Assessment.....	79
4.3.15.	Strategic Intervention Outcome.....	81
4.4.	Strategic Intervention: Micro, Small &Medium Enterprises (MSME)	82
4.4.1.	Objective of the Strategic Intervention.....	82
4.4.2.	Factors Influencing MSME Development	82
4.4.3.	Introduction	83
4.4.4.	Stakeholder Engagement and Partnerships	84
4.4.5.	Retail Capacity	84
4.4.6.	Online Shopping	85
4.4.7.	Leakage	86
4.4.8.	MSME Programmes and Projects.....	86
4.4.9.	Spatial Analysis	87
4.4.10.	High-Level Bulk Infrastructure Assessment.....	87
4.4.11.	Strategic Intervention Outcome.....	88
4.5.	Strategic Intervention: Informal Sector	89
4.5.1.	Objective of the Strategic Intervention.....	89
4.5.2.	Factors Influencing Informal Sector Development	89
4.5.3.	Introduction	90

4.5.4.	Stakeholder Engagement	91
4.5.5.	Informal Trading Market Areas and Zones	91
4.5.6.	Informal Trading Licences and Permits.....	91
4.5.7.	Informal Sector and Tourism Linkages	91
4.5.8.	Informal Sector Programmes and Projects.....	92
4.5.9.	High-Level Bulk Infrastructure Assessment.....	93
4.5.10.	Spatial Analysis	93
4.5.11.	Strategic Intervention Outcomes	93
4.6.	Strategic Intervention: Social Development	95
4.6.1.	Objective of the Strategic Intervention.....	95
4.6.2.	Factors that Influence Social Development.....	95
4.6.3.	Introduction	96
4.6.4.	Housing.....	96
4.6.5.	Health Care	97
4.6.6.	Retirement.....	97
4.6.7.	Education	98
4.6.8.	Precinct Development Approach	100
4.6.9.	Social Development Programmes and Projects.....	100
4.6.10.	Spatial Analysis.....	101
4.6.11.	High-Level Bulk Infrastructure Assessment.....	102
4.6.12.	Strategic Intervention Outcomes	104
4.7.	Strategic Intervention: Create an Enabling Environment	104
4.7.1.	Objective of the Strategic Intervention.....	104
4.7.2.	Introduction	104
4.7.3.	Local Economic Development and Investment Platforms	105
4.7.4.	CoW Branding and Marketing Promotion	105
4.7.5.	Buy-in.....	107
5.	WED Implementation Plan and Monitoring and Evaluation Framework	108
5.1.	Budget Responsibility	108
5.2.	Department of Economic Development and Community Services Project Key Performance Indexes (KPIs) and Budget.....	112
5.3.	Monitoring and Evaluation.....	113
5.3.1.	Introduction	113
5.3.2.	Monitoring & Evaluation Objectives.....	113
5.3.3.	Proposed M&E Framework	113
5.3.4.	Evaluation	117
5.3.5.	Reporting.....	117
6.	References	118
6.1.	Image Sources	118
6.2.	Bibliography	118
7.	Addendum.....	123
7.1.	Completing the Project Scorecard.....	123
7.2.	Completing the Project Management Report	123
7.3.	Completing the Thematical Priority Area Assessment Tool.....	124

Index of Figures

347

Figure 1: WED Strategy Outcomes.....	5
Figure 2: The Windhoek Economic Development Strategic Pillars.....	6
Figure 3: WED Strategy Outcomes.....	36
Figure 4: WED Strategic Framework.....	37
Figure 8: Factors Influencing Agriculture and Agro-Processing.....	40
Figure 9: An Overview of the Agro-processing Sector.....	42
Figure 10: Garlic Market Value Chain Explaining its Applications.....	45
Figure 11: Garlic Market Value Chain.....	46
Figure 12: Structure of the Poultry Egg Industry Value Chain.....	48
Figure 13: Windhoek Fresh Produce Business Hub Illustration.....	53
Figure 15: Factors Influencing Transport and Logistics Development.....	59
Figure 16: Factors Influencing Tourism.....	66
Figure 17: Tourism System.....	69
Figure 18: Potential Riverwalk Development Concept.....	72
Figure 21: Factors Influencing MSME Development.....	82
Figure 22: Factors Influencing Informal Sector Development.....	89
Figure 23: Factors Influencing Social Development.....	95
Figure 24: Potential Health and Retirement Precinct Development Concept.....	98
Figure 25: Impact Monitoring Framework.....	114

Index of Maps

Map 1: Regions of Namibia.....	24
Map 2: CoW Position in Khomas Region based on New and Old Demarcation.....	25
Map 3: CoW Constituency Boundaries.....	26
Map 4: Proposed location of the Pilot Project for Agricultural Production.....	55
Map 5: Proposed Location of land for further Agricultural Development.....	56
Map 6: Schematic of the River Walk proposal.....	78
Map 7: Potential Circle Route.....	79
Map 8: Proposed Health Precinct Policy Area.....	101
Map 9: Roads along which water pipelines of 160mm or larger diameter are located.....	103

Index of Tables

Table 1-1: Summary of Comparative Industry Advantages for Khomas Region.....	4
Table 1-2: Factors Influencing Agriculture and Agro-Processing.....	6
Table 1-3: Agriculture and Agro-Processing Programmes and Projects.....	7
Table 1-4: Strategic Intervention Outcome for Agriculture and Agro-Processing.....	7
Table 1-5: Factors Influencing Transport and Logistics Development.....	8
Table 1-6: Summary of the Transport and Logistics Programmes and Projects.....	9
Table 1-7: Strategic Intervention Outcome for Transport and Logistics.....	9
Table 1-8: Factors Influencing Tourism.....	10
Table 1-9: Tourism Programmes and Projects.....	11

Table 1-10: Strategic Intervention Outcome for Tourism 348	12
Table 1-11: Factors Influencing MSME Development.....	13
Table 1-12: MSME Programmes and Projects.....	14
Table 1-13: Strategic Intervention Outcome for MSME	15
Table 1-14: Factors Influencing MSME Development.....	16
Table 1-15: MSME Programmes and Projects.....	17
Table 1-16: Strategic Intervention Outcome for MSME	18
Table 1-17: Factors Influencing Social Development.....	19
Table 1-18: Social Development Programmes and Projects	20
Table 1-19: Strategic Intervention Outcome for Social Development	21
Table 3-1: Summary of Namibia and Khomas Industry GDP data - 2011.....	34
Table 3-2: Summary of Comparative Industry Advantages for Khomas Region.....	35
Table 4-1: Strategic Intervention Programmes and Projects	37
Table 4-2: Factors Influencing Agriculture and Agro-Processing	41
Table 4-3: Agriculture and Agro-Processing Programmes and Projects.....	54
Table 4-4: Strategic Intervention Outcome for Agriculture and Agro-Processing.....	58
Table 4-5: Factors Influencing Transport and Logistics Development.....	60
Table 4-6: Transport and Logistics Programmes and Projects	62
Table 4-7: Strategic Intervention Outcome for Transport and Logistics	65
Table 4-8: Factors Influencing Tourism.....	67
Table 4-9: Tourism Programmes and Projects	76
Table 4-10: Strategic Intervention Outcome for Tourism	81
Table 4-11: Factors Influencing MSME Development.....	83
Table 4-12: MSME Programmes and Projects.....	86
Table 4-13: Strategic Intervention Outcome for MSME	88
Table 4-14: Factors Influencing Informal Sector Development	90
Table 4-15: Informal Sector Programmes and Projects.....	92
Table 4-16: Strategic Intervention Outcome for the Informal Sector	93
Table 4-17: Factors Influencing Social Development.....	96
Table 4-18: Social Development Programmes and Projects	100
Table 4-19: Strategic Intervention Outcome for Social Development	104
Table 5-1: Budget Responsibility for Agriculture and Agro-Processing Projects.....	108
Table 5-2: Budget Responsibility for Transport and Logistics Projects.....	109
Table 5-3: Budget Responsibility for Tourism Projects	109
Table 5-4: Budget Responsibility for MSME Projects	110
Table 5-5: Budget Responsibility for Social Development Projects	111
Table 5-6: Projects to be Led and Funded by the Department of Economic Development and Community Services in CoW.....	112
Table 5-7: Project Scorecard	115
Table 5-8: Project Management Report.....	115
Table 5-9: Thematic Priority Area Assessment Tool.....	116
Table 5-10: Example of Indicators for Thematic Priority Areas.....	116
Table 7-1: Project Scorecard	123
Table 7-2: Example on How to Complete Project Management Report.....	123
Table 7-3: Example on How to Complete the Thematical Priority Area Assessment Tool.....	124

AGRIBUSDEV	-	The Agricultural Business Development Agency
AMTA	-	Agro-Marketing and Trade Agency
B2B	-	Business to Business
CAGR	-	Compound Annual Growth Rate
CAN	-	Central Areas of Namibia
CBNRM	-	Community Based Natural Resource Management
CoW	-	The Municipal Council of Windhoek (Council)
DAFF	-	Department of Agriculture, Forestry and Fishing of South Africa
DS	-	Distribution Station
DTT	-	Digital Terrestrial Television
EDD	-	Economic Development Department
EDM	-	Economic Development Manager
EPA	-	Economic Partnership Agreements
EU	-	European Union
FPBH	-	Fresh Produce Business Hub
FTA	-	Free Trade Agreement
GAP	-	Good Agricultural Practices
GDP	-	Gross Domestic Product
GPS	-	Global Positioning System
GVA	-	Gross Value added
GWWTWP	-	Gammams Waste Water Treatment Plant
HAN	-	Hospitality Association of Namibia
ICT	-	Information and Communications Technology
KPI	-	Key Performance Indexes
LC	-	Load Centre
MAR	-	Managed Aquifer Recharge
MAWF	-	Ministry of Agriculture, Water and Forestry
M&E	-	Monitoring and Evaluation
MICE	-	Meetings, Incentives, Conferencing and Events
MICIT	-	Minister of Information and Communication Technology
MITSMED	-	Ministry of Industrialization, Trade and SME Development
MSME	-	Micro Small Medium Enterprise
OWWTWP	-	Otjomuise Waste Water Treatment Plant

NGWRP	-	New Goreangab Water Reclamation Plant
NSA	-	National Statistics Agency
NtB	-	Non-tariff Barriers
NUST	-	Namibian University of Science and Technology
SADC	-	South African Development Community
SEO	-	Search Engine Optimization
SUTMP	-	Sustainable Urban Transport Master Plan
NTB	-	Namibia Tourism Board
TKC	-	Trans Kalahari Corridor
ToR	-	Terms of Reference
UAA	-	Urban Arterial Account
UNAM	-	University of Namibia
VBWTP	-	Von Bach Windhoek Treatment Plant
WED	-	Windhoek Economic Development
WWTP	-	Waste Water Treatment Plant

1. Executive Summary

1.1. Purpose of the Study

The main purpose of the study was to compile and complete an WED Strategy review that highlights the areas that needs focus on to ensure that it creates an enabling environment for investment, employment creation and economic growth.

This study has delineated Windhoek's development needs and opportunities, as well as its competitive and comparative advantages, which will help to facilitate economic development and job creation and encourage private sector investment.

1.2. Key Benefit of the WED Strategy

The key benefit of the WED is the identification of both public and private sector investment opportunities based on a comprehensive review of the City's status quo, including its social, labour, economic, spatial and infrastructure conditions. The WED further addresses the current and future issues faced by the municipality, which impact the creation of an enabling environment for investment, employment creation and economic growth within Windhoek.

The WED indicates the best options for municipal resource allocation to encourage local economic growth, job creation as well as improved infrastructure that will translate into increased wellness and prosperity for those who reside in Windhoek.

1.3. Status Quo

The status quo report was informed by an extensive secondary and primary research study which included a manufacturers, retail and tourism study. This information was used as baseline for the Windhoek Economic Development Strategy (WED) is referenced throughout the document which included the following:

- ◆ Overview of the policy framework
- ◆ Reference framework, including economic development and investment concepts
- ◆ Global, regional and local investment, trade and marketing outlook
- ◆ Status quo profile of CoW
- ◆ Synopsis of interviews and surveys conducted
- ◆ Potential analysis for CDM
- ◆ Best practices and case studies

The study team conducted a business survey focusing on retail within the City. A sample size of 368 was used to achieve a 95% confidence level and 5% confidence interval during March and April 2019. The respondent profile can be summarised as per follow:

- Respondents were a good mix between sole owners, co-owners, managers, supervisors and employees with 40% being managers.
 - Some 52% of these businesses were micro businesses with 53% being owned by one person or a small group of people who only own that specific firm. Some 13% of respondents were large businesses and 24% of respondents described themselves as branches and 11% as head offices.
 - Some 67% of respondents were retailers, while 17% described themselves as general dealers and 5% as wholesalers.
 - There is a negative correlation between firms that are branches and businesses owned by one person or a small group of people (-0.60).
 - Some 30% of respondents produce, sell or manufacture textiles, 21% shoes, 16% vehicles or parts, 12% groceries, 11% jewellery and 5% clothing.
 - The respondents were evenly spread out amongst the different malls in Windhoek.
 - There is a high positive correlation between firms that produce, sell or manufacture liquor and beverages and businesses that are bottle stores (0.93).
 - There is a positive correlation between firms that produce or sell textiles and businesses that produce or sell clothing.
-
- There is a positive correlation between firms that produce or sell furniture and businesses that produce or sell clothing (0.71).
 - There is a very strong positive correlation between firms producing or selling textiles and business that produce or sell shoes (1).
 - There is a strong positive correlation between business that produce sport or hobby products and business that produce or sell gifts.
 - Some 96% of businesses are registered businesses with 89% registered for VAT.

A business survey focusing on manufacturers was conducted. A sample size of 293 businesses to achieve a 95% confidence level and 5% confidence interval during March and April 2019 was used. The respondent profile can be summarised as follow:

- The respondents were a good mix between micro business with a turnover of less than N\$300,000 (59%), small business with a turnover of less than N\$3,000,000, (29%), medium size business with a turnover of less than N\$10,000,000 (9%) and large (4%) companies with a turnover with more than N\$10,000,000.
- The industry spread was 20% in the primary, 35% in the secondary 34% in the tertiary industry and 11% in the quaternary industry.
- Businesses indicating that they were large businesses had a positive correlation with businesses indicating that they are head offices (0.35). This may indicate that most large enterprise in Windhoek are also head offices.
- Businesses indicating that they were micro businesses had a high positive correlation with businesses employing only 1-4 full time employees (0.47).
- Businesses indicating that they were small businesses had a positive correlation with businesses employing 10-19 (0.22), 20-49 (0.23), 50-99 (0.15) full time employees.
- Businesses indicating that they were medium size businesses had a high positive correlation with businesses employing 50-99 full time employees (0.23).
- Businesses indicating that they were large businesses had a high positive correlation with businesses employing 100-149 (0.30) and over 150 full time employees (0.73).

A study was conducted focusing on tourist orientated businesses in the City. A sample size of 330 business was surveyed to achieve a 95% confidence level and 5% confidence interval between March and April 2019 for the survey.

- Some 66% of businesses indicated that they are micro businesses with a turnover of less than N\$300,000, 24% small businesses with a turnover of less than N\$3,000,000, 6% medium size businesses with a turnover of less than N\$10,000,000 and 4% were large businesses with a turnover of more than N\$10,000,000.
- A large proportion of businesses (38%) were in the hotel and restaurant industry, while the rest of the businesses were almost equally distributed amongst self-catering accommodation (5%), transport (5%), marketing services (5%) and lodges (4%). A significant portion (43%) were other tourist orientated businesses, which included, but were not limited to guesthouses, bars, gambling, places of interest, etc.
- Most respondents were registered. Some 94% stated that they were a registered business, although only 82% were registered for VAT and 86% have a bank account. There is a positive correlation between businesses that do not have bank accounts and that they are not registered for VAT (0.55).
- Some 75% of the businesses are owned by one or a small group of people who owns only that firm, 18% of respondents are one or multiple persons who owns more than one business, 3% are large businesses and 5% were branches of large corporates.
- Regarding legal status, 79% of businesses identified with being owned by one or a small group of people, 8% headquarters of large firms, 6% were franchises, 6% of large corporations' branches and 2% regional offices of large corporations.
- Only 30% of the respondents identified themselves as being the sole owner of the business, while 30% identified with being the manager, 11% being the co-owner, 11% with being a supervisor and 17% with being an employee.
- Some 100% of respondents indicated that their business is due to tourism. This indicates that the survey focussed on the correct respondents. There is also a positive correlation between Micro businesses and that they have 1-4 full time employees (0.55), and a positive correlation between large businesses and that they have more than 150 full time employees (0.58). This indicates that the respondents were truthful in their responses and which in turn indicates that the results of this survey have a high degree of reliability.

1.4. Key Issues

Some of the key issues identified during the status quo included the following.

- ◆ **In-migration:** It is estimated that the Khomas population in 2018 was between 431,938 and 433,939 of which between 415,074 and 416,997 lived in Windhoek. It is projected that in 2030 the Khomas population will be between 644,073 and 654,550, of which between 626,229 and 636,416 will live in Windhoek. This implies that the population is likely to increase by about 50% in 12 years.
- ◆ **Water Security:** Limited water is an ever-present concern in Windhoek.
- ◆ **Food Security:** The lack of agriculture in and near the city is of concern as it directly influences food security.
- ◆ **Housing:** Housing remains a serious issue in Windhoek. A significant share of households already lives in informal communities, predominantly towards the north and north-west of the city. It is estimated that about 31% of households in Khomas lived in improvised housing units or shacks in 2011. If this rate persisted, then 41,459 households in Khomas would have lived in shacks in 2018. The influx of people that will be accelerated by in-migration will create significant additional demand for housing. If current growth rates are considered, then by 2030, the city may require an additional 50,000 to 65,000 housing units.

- ◇ **Budget Constraints:** CoW is currently experiencing financial constraints which, in turn, hamper serviced land delivery across all income housing brackets. The CoW fell behind with serviced land delivery, which also inflated property prices. During the recent past, the CoW also committed to various social servicing projects, resulting in a poor return on capital investment, if any.
- ◇ **Transportation:** While the city already has a local transport system of decent quality, there is significant room for improvement.
- ◇ **Information and Telecommunication:** There are few signs of CoW achieving its vision of becoming a smart city. For most processes, 'clients' still have to go to the CoW offices for service. Most processes are still time-consuming, offline and paper-based. It was indicated by several key stakeholders that improving processes by making them simpler, faster and more reliable will already serve as an incentive for them to conduct more business with CoW. One feasible drive towards the SMART City vision is the Information and Telecommunications Department's fibre optic data network project to connect every citizen and business, with the fibre optic network acting as an economic enabler for everything else such as water and electrical metering, intelligent traffic flow management and other SMART services. The implementation of these services supports the Harambee Prosperity Plan and should be fully implemented by 2030.
- ◇ **Education Levels:** The city has good educational infrastructure, with several primary and secondary schools and the presence of the University and Vocation Training Cluster (UNAM, NUST, IUM) This cluster provides the city with a comparative advantage in education and skills compared to the rest of Namibia. Namibia's education level is low.

Tourism: The CoW Tourism Strategy is being developed in parallel with this strategy; its results and outcomes were not available by the time this study was concluded. Windhoek is not perceived as a tourism destination by many tourists, even though it has the potential to provide a good tourism product to visitors. The city can leverage its advantage of being a main port of entry by creating a tourist product that will captivate tourists for a day or two after they arrive and before they leave. The main constraint to tourism is underdeveloped tourism sites and attractions. Although Windhoek has many potential sites and attractions, few offer a more-than-adequate experience. For example, the National Museum has very few art exhibits, no guides and no interactive displays.

Table 1-1: Summary of Comparative Industry Advantages for Khomas Region

	Importance of Industry in Khomas	Comparative Scale Advantage over rest of Namibia	Industry Growth in Namibia
Agriculture	0.40%	2.56%	-2.67%
Fishing			0.51%
Mining and Quarrying	4.95%	16.59%	1.49%
Manufacturing	10.58%	26.31%	-0.86%
Electricity and Water	1.14%	19.87%	6.53%
Construction	2.48%	22.23%	12.83%
Wholesale and Retail Trade	4.16%	11.47%	8.63%
Hotels and Restaurants	0.37%	6.49%	7.60%
Transport and Communication	4.33%	26.46%	6.63%
Financial Intermediation	5.24%	29.27%	8.48%
Real Estate and Business Services	0.71%	2.55%	3.86%
Community, Social and Personal Services			-2.36%
Public Administration and Defence	11.52%	32.63%	4.75%
Education	8.24%	32.46%	5.09%
Health	7.37%	74.95%	10.41%
Private Households with Employed Persons	0.79%	23.02%	1.86%

Source: NSA, 2018 and Calculations by Urban-Econ, 2019

Green indicates best performers, Yellow indicates intermediate performers, and Red indicates worst performers.

1.5. WED Strategic Framework

Economic development is one component of sustainable development. Although the focus of the strategy focuses on economic development, it is cognisant of the cross-cutting goals which promote and protect the environment, the people who live in the city, infrastructure, and the policy and institutional environment within which CoW operates.

The most crucial cross-cutting strategic goals identified are:

- ◆ To protect the city's natural resources, especially water
- ◆ To densify specific areas within the city
- ◆ To increase connectivity, access to opportunities and spatial justice
- ◆ To ensure food security and social cohesion
- ◆ To ensure efficient and cost-effective service delivery

Within this context, the below are the economic development goals:

- ◆ To create a sustainable economy
 - Strategic importance to local economy
 - Scale advantage
 - GDP growth rate advantage
- ◆ To create employment opportunities

The below outcomes are expected should the Windhoek Economic Development Strategy be implemented in its entirety.

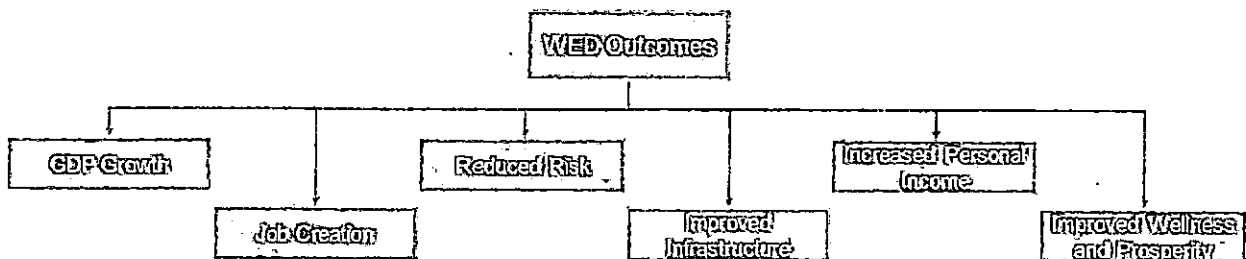


Figure 1: WED Strategy Outcomes

Taking cognisance of the cross-cutting and economic development goals, the overall vision of becoming a SMART and CARING city, and economic development outcomes, the figure below illustrates the Windhoek economic development (WED) strategic pillars.

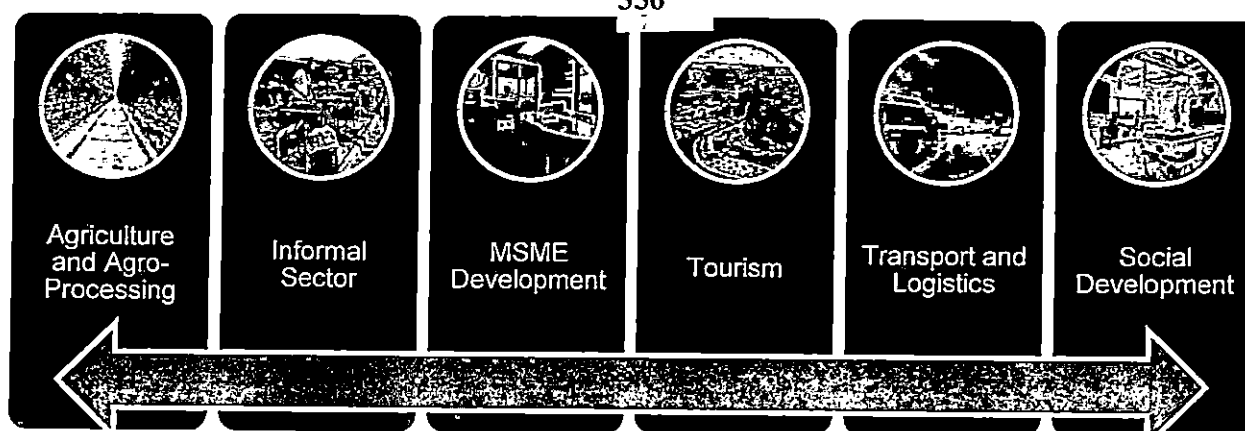


Figure 2: The Windhoek Economic Development Strategic Pillars

1.6. Strategic Intervention: Agriculture and Agro-Processing

The objective of this strategic intervention is to increase the cultivation of agricultural products and to add value to this primary input through local manufacturing and processing plants. This is of strategic importance to reduce food-security risk to the City.

Table 1-2: Factors Influencing Agriculture and Agro-Processing

Indicator	Rating	Comment
Food Security		About 36% of all household income is spent on food and beverages, which translates into about N\$5.7 billion of food and beverages being consumed in the City in 2018. Based on current population growth rates, this may increase to N\$8.6 billion by 2030.
Agricultural GVA		Agricultural GVA in Khomas Region was about N\$108.93 million in 2011. Khomas Region contributed an estimated 2.56% of the national agriculture GVA.
Agricultural Sector Importance to CoW		The agricultural sector in Khomas Region contributed about 0.40% of total GVA in Khomas Region in 2011.
Agricultural GVA Growth		The national agriculture sector GVA growth was about -2.67% p.a. between 2011 and 2016.
Freshwater Availability		Water supply is an ever-present concern in the City. The region receives about 350mm rainfall p.a., while the nearest perennial water source is over 700km away.
Reclaimed Water		In 2015, CoW could reclaim approximately 5.09 Mm ³ /a of water or about 22% of water required. In addition, about 0.92 Mm ³ /a of non-potable water was produced for irrigation.
Agricultural Land		After demarcation, the new City boundaries include some agricultural land.
Availability of Agricultural Produce		Agricultural GVA suggests that limited agricultural produce is cultivated in CoW and Khomas Region.
Manufacturing GVA		Manufacturing GVA in Khomas Region was about N\$2,870.05 million in 2011. Khomas Region contributed an estimated 26.31% of the national manufacturing GVA.
Manufacturing Sector Importance to CoW		The manufacturing sector in Khomas Region contributed about 10.58% of total GVA in Khomas Region in 2011.
Manufacturing GVA Growth		The national agriculture sector GVA growth was about -0.88% p.a. between 2011 and 2016.

Note! Colour-coding is used to indicate the status quo of an indicator in the context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

Table 1-3: Agriculture and Agro-Processing Programmes and Projects

Programmes	Projects
Increase Water Recovery	<ul style="list-style-type: none"> • Increase non-potable water recovery for agricultural use
Access to Farmland	<ul style="list-style-type: none"> • Boreholes • Review farmland access and availability in Windhoek • Identify municipal farmland close to existing non-potable water infrastructure for aquaponics and hydroponic farming
Increase Water Supply to Selected Farmland	<ul style="list-style-type: none"> • Water pipeline for potable and/or non-potable water between water plant and cluster of farms
Increase Agriculture Stakeholder	<ul style="list-style-type: none"> • Schedule agriculture and agro-processing sessions as a regular feature in the Economic Development and Investment Forum (see section 4.6.9) • Partner with agriculture and agro-processing stakeholders such as existing commercial farmers, academic institutions to improve agricultural production (genetics, technology, methods, etc.) within the City
Increase Agricultural Produce (crops, organic and livestock)	<ul style="list-style-type: none"> • Conduct an Agriculture Cultivation and Agro-Processing Strategy study to identify the best crops, freshwater fish and livestock options for the City • Support aquaponics and hydroponic farmers: <ul style="list-style-type: none"> • Rent available for agricultural land to aquaponics and hydroponic farmers • Supply these farms with non-potable water infrastructure • Increase livestock (egg/layer and pig) production <ul style="list-style-type: none"> • Rent available for owned agricultural land to livestock farmers • Ensure that these farms have the required water rights • Supply these farms with water infrastructure (e.g. boreholes) to ensure water suitable for livestock production • Support organic agriculture produce production • Support household agriculture/roof gardening, etc.
Value-Chain Development of Agricultural Produce	<ul style="list-style-type: none"> • Develop Agricultural Produce Value Chains <ul style="list-style-type: none"> • Conduct market value-chain studies (local and export supply and demand studies) for all selected crops • Identify potential agro-processing investment opportunities • Identify potential agro-processing investors
Agro-Processing	<ul style="list-style-type: none"> • Support the Fresh Produce Hub (AMTA)

Table 1-4: Strategic Intervention Outcome for Agriculture and Agro-Processing

Indicator	Rating	Comment
Food Security		More food is produced, which in turn increases food security.
Agricultural GVA		Agricultural GVA increases.
Agricultural Sector Importance to CoW		The agricultural sector in Khomas Region contributes more to the Khomas GVA.
Agricultural GVA Growth		Agricultural project will contribute to national agricultural growth.
Freshwater Availability		New and improved agricultural techniques ensure that less strain is placed on freshwater usage.
Reclaimed Water		Additional non-potable water is produced for irrigation.
Agricultural Land		Agricultural land is more optimally used in City.
Availability of Agricultural Produce		Additional agricultural produce is available for agro-processing.
Manufacturing GVA		Manufacturing GVA in Khomas Region will increase due to the availability of additional agricultural produce and increased agro-processing.
Manufacturing Sector Importance to CoW		The manufacturing sector in Khomas Region will contribute more to total GVA in Khomas Region.
Manufacturing GVA Growth		Agro-processing projects will contribute to national manufacturing growth.

Note! Colour-coding is used to indicate the anticipated status of an indicator in the context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability after all proposed interventions have been implemented. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

1.7. Strategic Intervention: Transport and Logistics

The objective of this strategic intervention is to improve connectivity by improving its local and bulk transport and logistics networks.

Table 1-5: Factors Influencing Transport and Logistics Development

Indicator	Rating	Comment
Geographical Location		Windhoek is centrally located in Namibia.
Transport GVA		Transport GVA in Khomas Region was about N\$1,174.70 million in 2011. Khomas Region contributed an estimated 26.46% of the national transport GVA.
Transport Sector		The transport sector in Khomas Region contributed about 4.33% of total GVA in Khomas Region in 2011.
Importance to CoW		
Transport GVA Growth		The national transport sector GVA growth was about 6.63% p.a. between 2011 and 2016.
Airports		Windhoek has two main airports, namely Hosea Kutako International Airport and Eros Airport.
Air Cargo		Eros Airport is predominantly used by small charter planes.
Rail		Windhoek is located at the core of TransNamib's rail network.
Bulk Rail Cargo		Transport of freight by rail between Namibia and South Africa is not viable. An agreement had been signed Botswana and Namibia for the development of the Trans-Kalahari railway, which is estimated to cost US\$9.5 billion. The line will link Walvis Bay through Windhoek and Gaborone to Johannesburg. However, the timeline for this intervention is not clear yet. A bilateral Memorandum of Agreement was signed in 2014 between the Namibian and Botswana Governments for the development of the Trans-Kalahari Railway. At the time, the project was scheduled for completion by 2019, hence a construction period of five years. However, five years later the project has not yet kicked off. Although the project remains in limbo, Botswana Railways did indicate that it is still committed to the development of the Trans-Kalahari Railway.
Road		Several major roads pass through or near Windhoek, including the B1 (South Africa and Angola), B2, B6 (Botswana), and B8 (Zambia). These form the backbone for the cross-border corridors such as Trans-Cunene Corridor, Trans-Oranje Corridor, and Trans-Kalahari Corridor, and have easy access to the Walvis Bay-Ndola-Lubumbashi Development Corridor.
Heavy Vehicles		Heavy vehicles make up a significant proportion of all traffic on major highways. The more common routes include: Rehoboth – Windhoek: 12% of all traffic (616 trucks per day out of 5,184 vehicles total); Windhoek – Brakwater: 9% (1,415 / 15,378); Windhoek – Hosea Kutako Airport: 10% (322 / 3,273); and Windhoek – Walvis Bay: 12% (10 / 84).
Imports		Between 2012 and 2017, Namibia was a net importer, with the exception of 2017. About 55% of all imports came from South Africa. Due to the lack of train services in South Africa, most of this is transported using trucks.
Exports		South Africa was the predominant export market for Namibia as it contributed about 21.79% to the exports of Namibia in 2017. Other countries that imported from Namibia include Botswana, Switzerland and China.
Public Transport		Windhoek has a reasonably good bus service operating throughout the day in half-hour intervals. In addition, local metered taxis cover most of the outskirts of Windhoek.
Traffic		Windhoek does not have significant traffic congestion issues, but unsynchronised traffic lights add to travel time.
Parking		Windhoek, especially in its city centre, lacks parking.
Non-Motorised Transport		Windhoek lacks a non-motorised transport system.

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Table 1-6: Summary of the Transport and Logistics Program and Projects

Programmes	Projects
Logistics Support Structures	<ul style="list-style-type: none"> Upgrade Logistics Hub such as truck stop, rail yards, air cargo and piggyback infrastructure Upgrade Rail Support Services such as rolling stock maintenance yard and marshalling yards Review capacities of storage facilities (warehouses, cold storage, etc.) as logistical support structures to assess sufficiency to accommodate logistics growth trends
Local Public Transport	<ul style="list-style-type: none"> Review of Transport Plan (together with Spatial Development Framework) <ul style="list-style-type: none"> Transport node developments Transport route developments Airport-tourist hub bus route Licensing of private sector operators in tourist areas
Implement Non-Motorised Transport Plan	<ul style="list-style-type: none"> Implement Non-Motorised Transport Strategy <ul style="list-style-type: none"> Pedestrian walkways Cycling lanes

Table 1-7: Strategic Intervention Outcome for Transport and Logistics

Indicator	Rating	Comment
Geographical Location	No Change	
Transport GVA		Transport GVA in Khomas Region may increase.
Transport Sector Importance to CoW		The transport sector in Khomas Region will become an important sector in Khomas.
Transport GVA Growth		Due to increased transportation and logistics activity, the sector will continue to grow.
Airports	No Change	
Air Cargo	No Change	
Rail		Windhoek is located at the core of TransNamib's rail network. This can be leveraged to increase Windhoek's share to provide additional transport support services.
Bulk Rail Cargo		Windhoek could become a major player in providing bulk rail freight to neighbouring countries. This may be unlocked by the agreement signed between Botswana and Namibia for the development of the Trans-Kalahari railway, which is estimated to cost US\$9.5 billion. It must be noted that the implementation of this project in Windhoek is still uncertain due to topographical constraints towards the west of Windhoek.
Road	No Change	
Heavy Vehicles		Less heavy vehicles use major highways, decreasing damage to road infrastructure.
Imports		Namibia and Windhoek will become a hub through which imported goods destined for neighbouring countries can be moved.
Exports		Namibia and Windhoek will become a hub through which export goods destined for neighbouring countries can be moved. This may assist manufacturers in Windhoek to export additional products to these countries.
Public Transport		CoW will improve its public transport system's efficiency to connect labour with areas that provide job and economic opportunities. The public transport system will be expanded to increasingly more areas, including the airport to ensure additional transportation options for tourists.
Traffic	No Change	
Parking		Since more people utilise public and non-motorised transport, there will a reduced need for parking in Windhoek, especially in the city centre.
Non-Motorised Transport		By implementing the reviewed non-motorised transport plan, more people will have access to economic opportunities.

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1.8. Strategic Intervention: Tourism

The objective of this strategic intervention is to improve on its tourism product offering to encourage tourists to extend their stay within the City.

Table 1-8: Factors Influencing Tourism

Indicator	Rating	Comment
Tourism Business Growth		Some 41% of tourism businesses in this sector indicated that they had experienced an increase in turnover during the previous three years (2016-2018), while 38% indicated a decline in turnover.
Tourism Business Confidence		Some 71% of businesses in the sector indicated that they expect growth in turnover in the next 12 months. Other indicators included employment (52% vs. 6%), market share (54% vs. 6%), and physical space (34% vs. 3%).
Business Expansion		Some 40% of tourism-orientated businesses are considering expanding their businesses, of which 45% are considering opening a new branch and 35% are considering expanding their current product range.
Tourism Business Promotion		Only 21% of tourism-orientated businesses have websites.
Tourism Promotion		Some 68% of tourism-oriented businesses indicated that Windhoek is well-promoted to foreign tourists, yet the official website has significant technical issues.
Tourist Attractions		Windhoek has a cluster of high potential tourist attractions in and around the city centre that are underdeveloped. In addition, the top four tourists' attractions indicated by tourist-oriented business in Windhoek were Heroes Acres (19%), Craft Market (14%), Joe's Beerhouse (13%) and National Art Gallery (10%). The Riverwalk development may also provide a boost to Windhoek's range of tourist attractions.
Tourist Accommodation		Windhoek has a well-developed tourist accommodation industry with various accommodation options.
Tourism Grading		Only 15% of tourist businesses were graded. Most were graded as 2 stars with only 12% being 5-star.
Tourism Associations		Only 18% of tourist businesses were registered with an official tourism association.
Local Transport System		Windhoek has a reasonably good bus service operating throughout the day in half-hour intervals. In addition, local metered taxis cover most of the outskirts of Windhoek.
Tourist Support Structures		Windhoek has a strong tourism system including support systems, enabling environment and soft infrastructure.
Ports		Windhoek has two main airports, namely Hosea Kutako International Airport and Eros Airport. Most non-African foreign tourists enter Namibia through these ports.
Tourism Safety and Security		Windhoek has a dedicated policing unit that focuses only on the safety and security of tourists.
Tourism Information Centre		The tourism information centre in Windhoek is hidden away in a corner in Post Mall Street.
Tourism Signage		Tourism signage is reasonably good, but some are outdated and the signage for the tourism information centre in Windhoek is in the middle of a tree.

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Table 1-9: Tourism Programmes and Projects

361

Programmes	Projects
Tourism Attraction Development	<p>Circular Walkable Tourist Route</p> <ul style="list-style-type: none"> Develop circular walkable routes (with Route Markers) Employ qualified tour guides Develop a CoW tour guide mobile app (GPS prompts) that is interlinked with the open data channels currently being developed by the CoW Smart City Unit as mentioned by the CoW Tourism Strategy (PWC Namibia, 2019). This tour guide should ideally also link with the mobile phone app which is currently being developed under the City of Windhoek Passenger and Transport Section. Upgrade and develop tourist attractions (with attraction custodians) Transfer custodianship of attractions to CoW if required <p>Riverwalk Development</p> <ul style="list-style-type: none"> Theatre Boutique retail Hotels Restaurants Entertainment area
Tourism Transport	<ul style="list-style-type: none"> Facilitate development of tourist transport between tourist attractions <ul style="list-style-type: none"> Bus service to airport Licensing of transport operators on and between tourist attraction routes, e.g. Tuk-tuk service, red bus, etc.
Tourism Zoning	<ul style="list-style-type: none"> Rezoning businesses in tourism areas
Tourism Grading and Marketing	<ul style="list-style-type: none"> Promote tourism grading Tourism Destination Marketing – Update CoW website's tourism section (or create a CoW tourism website) <ul style="list-style-type: none"> Create interactive content for the website (text, images, videos) <ul style="list-style-type: none"> Walkable routes Windhoek tourist attractions Events Accommodation Restaurants Search Engine Optimisation Review Tourism Signage
Tourism Skills Training	<ul style="list-style-type: none"> Relocate Tourism Information Centre Basic tourism skills short courses, e.g. food preparation, receptionist training, housekeeping, etc.

Table 1-10: Strategic Intervention Outcome for Tourism

362

Indicator	Rating	Comment
Tourism Business Growth		The Tourism industry was growing before the COVID pandemic. However, the effect of the COVID pandemic will have devastating effect on the industry.
Tourism Business Confidence		Tourism growth will increase tourism orientated business confidence.
Business Expansion		Tourism businesses will expand due to more demand for tourism-orientated products and services.
Tourism Business Promotion		The CoW tourism website provides local tourism-orientated business with the opportunity to promote their businesses without having to create their own websites.
Tourism Promotion		The CoW tourism website, together with appropriate Search Engine Optimisation, will promote the tourism offering in Windhoek.
Tourist Attractions		Improving the quality of tourist attractions in Windhoek will improve the overall tourism product offering in Windhoek.
Tourist Accommodation		Windhoek has a well-developed tourist accommodation industry with various accommodation options.
Tourism Grading		More graded tourism accommodation options will enhance the accommodation profile of Windhoek. It will also provide tourists with insights into the quality of the product offering.
Tourism Associations		More tourism-orientated businesses will be registered with an official tourism association.
Local Transport System		No Change
Tourist Support Structures		Windhoek has a strong tourism system including support systems, enabling environment and soft infrastructure
Ports		No Change
Tourism Safety and Security		No Change
Tourism Information Centre		A more visible tourism information centre will be able to promote tourist attractions to tourists.
Tourism Signage		Improved signage will enable tourists to find the tourism information centre and tourist attractions more easily.

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1.9. Strategic Intervention: Micro, Small and Medium Enterprises (MSME) ³⁶³

The objective of this strategic intervention is to diversify and expand existing formal and informal businesses in Windhoek through business support and networking and to stimulate the development of new businesses.

Table 1-11: Factors Influencing MSME Development

Indicator	Rating	Comment
Trade MSME Growth		About 39% of trade businesses indicated that they had some growth while 40% indicated some decline in turnover.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Trade GVA		Trade GVA in Khomas Region was about NS1,127.67 million in 2011. Khomas Region contributed an estimated 11.47% of the national trade GVA.
Trade Sector Importance to CoW		The trade sector in Khomas Region contributed about 4.16% of total GVA in Khomas Region in 2011.
Trade GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016.
Trade MSME Business Confidence		Some 66% of businesses in the sector indicated that they expect growth in turnover in the next 12 months for their business compared to only 15% who expected a decline in turnover. However, this was pre COVID.
Retail Space		Some 36% of the businesses indicated that there is not enough retail space available in Windhoek, but 56% also indicated that there is rental space available in their neighbourhood.
Leakage		Only 35% of businesses procure their products in Windhoek and 17% in the rest of Namibia.
Ease of Doing Business		Namibia ranked a low 107 out of 190 nations in Ease of Doing Business. Namibia scored low in many sub-sectors, including Starting a Business (172), Dealing with Construction Permits (83), Getting Electricity (71), Registering Property (174), Getting Credit (73), Protecting Minority Investors (99), Paying Taxes (81), Trading Across Borders (136), Enforcing Contracts (58) and Resolving Insolvency (125).
Permits		Only 58% of businesses applying for liquor licenses and 60% of businesses selling food indicated that the process to acquire the necessary permit was easy or very easy. Some 36% of those applying for liquor licenses and 22% of those that sold food indicated that their permit application process took longer than three months.
Local Business Promotion		Only 30% of local businesses have business websites.
Stakeholder Engagement		Only 33% of businesses have ever participated in local forum meetings, while only 22% participated in local economic development meetings, 16% in local police forums and 27% attended or participated in investment conferences or trade fairs.
Incentives		Some 9% of businesses enjoy benefits from Free Trade Agreements (FTAs) and 8% enjoy benefits from Economic Partnership Agreements (EPAs). In addition, only 7% exploit local or regional incentives of which 58% were rebates, 21% were fiscal and 21% were non-fiscal.

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Table 1-12: MSME Programmes and Projects

364

Programmes	Projects
Local Forums	• Implementation of WED and Investment Forum
	• Localisation
	• Create or support a 'Buy Windhoek' programme
	• Local procurement should be prioritised by CoW's supply chain
MSME Support and Promotion	• Include a MSME support desk inside the Business Development/ Investor Liaison Desk
	• Assist small businesses to apply for national incentives
	• Assist small businesses with marketing and promotion
	• Business directory
Informal Trade Support	• Develop levels of incubation centres
	• Upgrade trading facilities (Katutura Industrial Stalls, Menarorandu Industrial Stalls, Bokamoso Entrepreneurial Centre)
	• Develop public facilities near trading facilities
	• Roll out Wi-Fi hotspots
Improved Wi-Fi Connectivity	• Partner with MSME Development Agencies
	• Partner with Development agencies such as NCCI Windhoek Branch, NUST, Team Namibia etc.
Reduce Red Tape	• Research and Development
	• Entrepreneurship and Incubation
	• Innovation Marketplace
	• Marketing and Promotion
Export Development	• Review permit processes
	• Facilitate development of e-systems for the following processes:
	• Dealing with construction permits
	• Getting electricity
Facilitate development of e-systems for permits:	• Registering property
	• Liquor license
	• Sell food license
	• Certificate of Fitness
Develop an Export Strategy	• Identify local businesses that produce products which could potentially be exported
	• Identify potential markets for locally-produced products including leather, cosmetics, etc.

Table 1-13: Strategic Intervention Outcome for MSME

Indicator	Rating	Comment
Trade MSME Growth		By improving trading space and marketing Windhoek as an attractive investment location for MSME by reducing red tape, improving the ease of doing business, and providing MSME with investment incentive support, the amount and size of the MSME sector will increase within the city.
Population Growth		No Change
Trade GVA		By improving trading space and marketing Windhoek as an attractive investment location for MSME by reducing red tape, improving the ease of doing business, and providing MSME with investment incentive support, the trade and wholesale GVA will increase within the city.
Trade Sector Importance to CoW		The trade and wholesale sector will increase and become an important sector within Windhoek.
Trade GVA Growth		Additional national trade sector GVA growth.
Trade MSME Business Confidence		MSME business confidence will increase as the industry experiences growth.
Retail Space		Spatial optimisation improvements at trading spaces and incubators will increase the total amount of retail space available in Windhoek.
Leakage		The 'Buy Windhoek' programme and placing more emphasis on local procurement within Windhoek's supply chain will reduce leakage.
Ease of Doing Business		The review of processes and increased use of e-government systems will improve the ease of doing business.
Permits		The review of processes and increased use of e-government systems will decrease the waiting time for permits (building permits, compliance certificates, etc.).
Local Business Promotion		The CoW website directory will give more exposure to local business.
Stakeholder Engagement		The Windhoek Economic Development and Investment Forum will provide local MSME with the opportunity to engage with CoW on their issues.
Incentives		The inclusion of the MSME support desk inside the Business Development / Investor Liaison Desk will assist small businesses to apply for national incentives.

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1.10. Strategic Intervention³⁶⁶. Informal Sector

The objective of this strategic intervention is to diversify, integrate and support existing informal businesses in Windhoek through business support, improved infrastructure, and facilities.

Table 1-14: Factors Influencing Informal Sector Development

Indicator	Rating	Comment
Informal Sector Employment		The informal sector employs 64 266 individuals, which constitutes 38.9% of total employment in Khomas in 2018. The informal sector provides employment and income opportunities for low skilled and unskilled individuals, which can reduce poverty and unemployment rates.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Informal Sector GVA		Trade GVA in Khomas Region was about N\$1,127.67 million in 2011. Khomas Region contributed an estimated 11.47% of the national trade GVA. There is currently a lack of data available to measure the performance of the informal sector.
Informal Sector Importance to CoW		The informal sector plays a key role in stimulating economic development and creates employment opportunities for those looking for work or unemployed.
Informal Sector GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016. There is currently a lack of data available to measure the performance of the informal sector.
Informal Trading Market Areas and Zones		There is a need for a more structured informal sector, equipped with Wi-Fi and facilities to support the informal trade.
Product Diversity		Informal traders generally sell very similar goods, such as jewellery, trinkets, and hand-crafted statues. However, there is a need to increase the variety of products sold.
Informal Trading Licenses and Permits		Only 58% of businesses applying for liquor licenses and 60% of businesses selling food indicated that the process to require the necessary permit was easy or very easy. Some 36% of those applying for liquor licenses and 22% of those that sold food indicated that their permit application process took longer than 3 months. There is currently a need to improve regulations of informal trading permits in the CoW and develop efficient management practices regarding licences and permits for the informal sector. A large number of informal traders are involved in food preparations, which requires regulation and enforcement of better hygiene practices.
Crime and Safety		Crime plays an important role in the growth and development of the informal sector. 61% of businesses indicated that crime plays a role in the success of their businesses. Crime also deters tourists from visiting informal trading areas.
Stakeholder Engagement		Only 33% of businesses have ever participated in local forum meetings, while only 22% participated in local economic development meetings, 16% in local police forums and 27% attended or participated in investment conferences or trade fairs. There is currently no forum available for the informal sector to engage government and raise concerns.
Infrastructure and Facilities		There is a strong need to install and/or upgrade infrastructure and facilities available in the areas/zones for informal markets. This relates to improvement and maintenance of service delivery infrastructure, including electrical power networks, clean water supply, and sanitation.

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Table 1-15: Informal sector Programmes and Projects

367

Programmes	Projects
Informal Trade Support	<ul style="list-style-type: none"> Upgrade selected informal markets <ul style="list-style-type: none"> Oshetu market at the Katutura Single Quarters Soweto market Nangenda Kaduuluma market in Wanahedra Lyeeta open market in Okuryangava Develop public facilities near informal markets <ul style="list-style-type: none"> River Walk Initiative Non-motorized Transport Strategy Public Transport Nodes Consider developing new informal markets based on the locality decisions made by informal traders themselves: <ul style="list-style-type: none"> "4 Ways" – Corner of Monte Christo and Maishiishi Roads Eveline Street China Town – clustered street vendors "Fruit and Veg Market" in Nelson Mandela Avenue - Klein Windhoek River Olympia – Corner of Frankie Fredericks and Jason Hamutenya Ndadi Streets Corner of Monte Christo and Otjomuise Roads
Informal Sector Forum	<ul style="list-style-type: none"> Establishment of an Informal sector forum
Informal Sector Incubation	<ul style="list-style-type: none"> Participation of the informal sector at the Local Economic Development and Investment Forum
Improved Wi-Fi Connectivity	<ul style="list-style-type: none"> Develop an informal sector incubation centre
Partner with the Informal Sector	<ul style="list-style-type: none"> Roll out Wi-Fi hotspots in informal trading markets Partner with the informal sector, through stakeholder engagements and forums, to address the need for: <ul style="list-style-type: none"> Business support Entrepreneurship support and mentorship Access to funding and/or financing
Reduce Red Tape	<ul style="list-style-type: none"> Review permit processes Facilitate Development of e-systems for permits: <ul style="list-style-type: none"> Liquor license To sell food licence Certificate of Fitness

Table 1-16: Strategic Intervention Outcome for Informal sector ²⁰²¹ 368

Indicator	Rating	Comment
Informal Sector Employment		By providing support and promotion of the informal sector, those unemployed or currently not economically active may resume seeking opportunities in the sector. Low and unskilled individuals may also increase their employment and income levels through the promotion of the sector. This will exhibit an overall reduction in current unemployment rates.
Population Growth		No change.
Informal Sector GVA		While there is currently no data available on GVA for the informal sector, through engagements via forums and various platforms, there can be increased access to knowledge and data on the sector. However, with a strong focus on informal sector support, GVA is expected to increase as a result of increasing business activity.
Informal Sector Importance to CoW		The informal sector plays a key role in stimulating economic development and creates employment opportunities for those looking for work or unemployed. The informal sector will remain a key economic driver in the City.
Informal Sector GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016. There is currently a lack of data available to measure the performance of the informal sector. However, GVA is expected to increase.
Informal Trading Market Areas and Zones		Informal trade will become more sustainable for business owners, increasing the overall effect on employment and income levels. The informal sector will also experience increased foot traffic for the general public as well as tourists.
Product Diversity		Through collaboration between the City and informal traders, the variety of goods and services offered from the informal sector will increase and boost market attractiveness.
Informal Trading Licenses and Permits		Improved management and regulation of informal businesses, especially those that sell food and meat products. Licenced informal traders will also be in a better position to benefit from infrastructure and facility developments by the City.
Crime and Safety		Reduced crime and improved safety will entice tourists and the general public to shop and visit the informal market areas and zones. Tourists will also have a sense of safety when visiting tourist attractions.
Stakeholder Engagement		An informal sector forum will enable the City to partner with the informal sector.
Infrastructure and Facilities		Informal traders will be able to operate in a more conducive environment for business activities.

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1.11. Strategic Intervention: Social Development

The objective of this strategic intervention is to become a caring city by addressing the social needs of those who reside in it.

Table 1-17: Factors Influencing Social Development

Indicator	Rating	Comment
Housing		Some 31% (or about 41,459) of households lived in Improvised Housing in 2018. It is estimated that an additional 50,000 to 60,000 housing units will be required by 2030.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Health Care Facilities and System		Windhoek has the largest concentration of public hospitals and clinics and serves and acts as the main healthcare hub in the country. People bypass the primary care system (clinics) and go directly to one of the hospitals, creating pressure on this component of the healthcare system. The Ministry of Health and Social Services has plans to construct a new hospital towards the west of the city. The Ministry of Health and Social Services acknowledges that there is a general lack of other types of health care services such as mental health institutions, old-age care, etc.
Health GVA		Health GVA in Khomas was about N\$2,001.13 million in 2011. Khomas contributed an estimated 74.95% of the national health GVA.
Health Sector Importance to CoW		The health sector in Khomas contributed about 7.37% of total GVA in Khomas in 2011.
Health GVA Growth		The national health sector GVA growth was about 10.41% p.a. between 2011 and 2016.
Education GVA		Education GVA in Khomas was about N\$2,236.19 million in 2011. Khomas contributed an estimated 32.46% of the national health GVA.
Education Sector Importance to CoW		The education sector in Khomas contributed about 8.24% of total GVA in Khomas in 2011. CoW is the centre for tertiary education for Namibia.
Education GVA Growth		The national education sector GVA growth was about 5.09% p.a. between 2011 and 2016.
Education Levels		Of all adults over 15 years of age, about 22.6% of the National population have completed secondary education while an additional 8% have completed tertiary education. Since CoW is the centre of tertiary education in Namibia, the city has more educated and skilled workers than the rest of the country.
Pension and Retirement Funded Households		About 10.2% of all household income in Namibia is derived from a state pension and an additional 1.3% from a private pension in 2016. In Khomas, only 3.4% of households derive their income from a state pension and 3.4% from an old-age pension, in 2016.
Adults with Disabilities Funded Households		About 0.8% of all household income in Namibia is derived from a disability grant for adults over 16, compared to 0.2% in Khomas in 2016.
State Child Maintenance Grants Funded Households		About 0.7% of all household income in Namibia is derived from child maintenance or orphan's grant in 2016, compared to 0.2% in Khomas.

Note! Colour-coding is used to indicate the status quo of an indicator in the context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; Red = Poor; Yellow = Average; Green = Good

Table 1-18: Social Development Programmes and Projects

Programmes	Projects	Housing	
		<ul style="list-style-type: none"> ○ Densification of Housing Precincts ○ Identify available land for development ○ Re-activate an integrated erf development and servicing programmes ○ Low-Cost Municipal Rental Housing ○ Repurposing under-utilised buildings ○ Encourage private sector involvement in below-entry-level housing market (e.g. re-think density, mixed land-use and bulk) 	
Health and Care Precinct	Hospital		
	Health Care Precinct	<ul style="list-style-type: none"> ○ Clinic ○ Training college for nurses ○ Housing for nurses and students ○ Shelter for the homeless ○ Soup kitchen ○ Hospice ○ Place of safety for women and children ○ School (with hostel) for the physically and mentally handicapped ○ Training facility for the physically and mentally handicapped 	
Retirement Precinct	Psychiatric Institution		
	Retirement Village	<ul style="list-style-type: none"> ○ Self-care housing units ○ Assisted living units ○ Dependent living units ○ Frail care units ○ Low-cost retirement units 	

Table 1-19: Strategic Intervention Outcome for Social Development

Indicator	Rating	Comment
Housing		More housing opportunities will be available near economic opportunities.
Population Growth		No Change
Health Care Facilities and System		Windhoek health system, especially its social services, will improve significantly.
Health GVA		Health GVA in Khomas Region will increase.
Health Sector Importance to CoW		The Health services sector is and will remain an important sector in Windhoek.
Health GVA Growth		The Health services sector is and will continue to be an important growth sector in Windhoek.
Education GVA		No Change
Education Sector Importance to CoW		No Change
Education GVA Growth		No Change
Education Levels		No Change
Pension- and Retirement-Funded Households		More people will be able to afford to retire in Windhoek.
Adults with Disabilities Funded Households		More adults with disabilities will be cared for in Windhoek.
State Child Maintenance Grants-Funded Households		No Change

Note! Colour-coding is used to indicate the anticipated status of an indicator in the context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability after all proposed interventions have been implemented. The ratings are:

 = Neutral;  = Poor;  = Average;  = Good

1.12. Strategic Intervention: Create an Enabling Environment

The objective of this strategic intervention is to facilitate an enabling environment to encourage economic development and investment in Windhoek. This strategic intervention represents cross-cutting activities that had already been included in the other strategic interventions. In this strategic intervention, these activities are reviewed from a holistic perspective:

- ◆ Local Economic Development and Investment Platforms
- ◆ SMART City Activation
- ◆ Bulk Infrastructure and Serviced Land
- ◆ CoW Branding and Marketing Promotion
- ◆ Buy-in

1.13. WED Implementation Plan and Monitoring and Evaluation Framework

The Strategy provides a project-based budget and budget responsibility framework. It further provides a list of projects to be led and funded by the Department of Economic Development and Community Services, including KPIs.

1.14. Monitoring and Evaluation³⁷²

The Strategy provides a Monitoring and Evaluation Framework (M&E), including project-specific impact monitoring and thematic priority area impact monitoring based on objectives of M&E in the context of the WED Strategy.

2. Introduction

373

This section introduces the purpose of the study, the study location, and how the study was conducted. To inform this study, extensive research was conducted, including desktop, surveys and personal interviews, which was packaged within a status quo report. This provided a baseline for the potential analysis in Windhoek, which in turn provided guidance to the development of the Strategy.

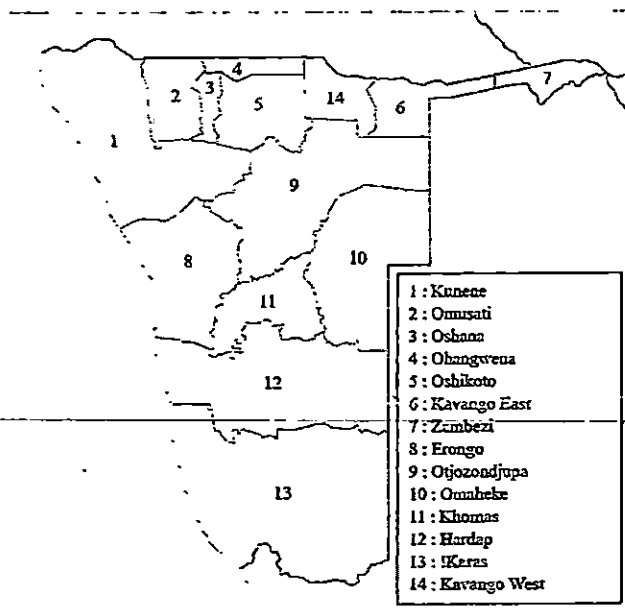
2.1. Purpose of the Studies

The main purpose of the study was to compile and complete a WED Strategy review that highlights the areas of focus to ensure that it creates an enabling environment for investment, employment creation and economic growth.

This study has delineated Windhoek's development needs and opportunities, as well as its competitive and comparative advantages, which will help to facilitate economic development and job creation and encourage private sector investment.

2.2. Study Location

Namibia is divided into 14 regional councils and 57 unitary local authorities comprising 13 municipal councils, 26 towns and 18 village councils. The municipal councils are further subdivided into three Part I municipalities (cities) and 15 Part II municipalities and Part III municipalities. Windhoek is classified as a Part I municipality.



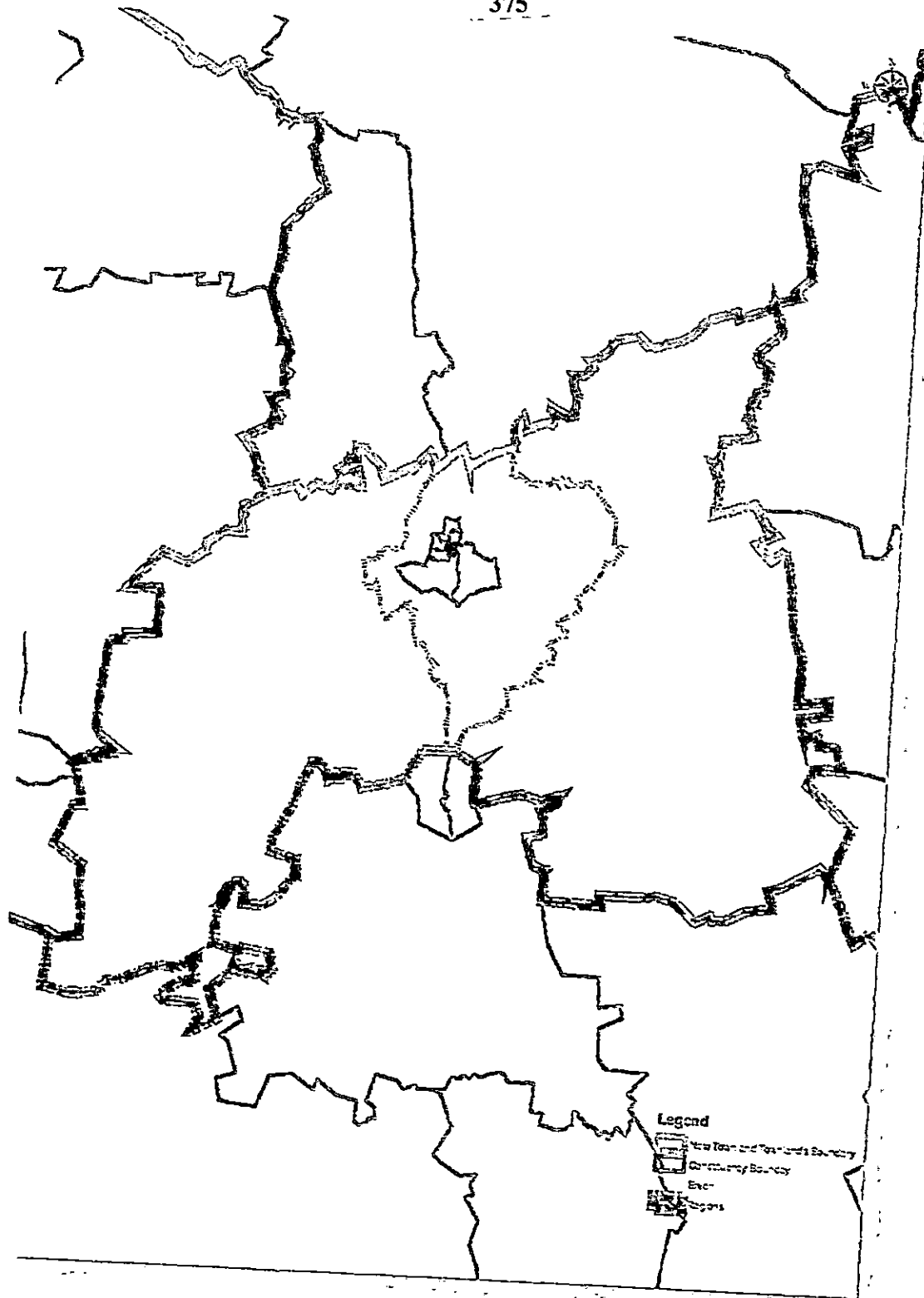
Windhoek is located in the Khomas Region. As illustrated Map 1, the Khomas region is located at the centre of Namibia in a basin between the Khomas Highlands, the Avis mountains and the Eros mountains, about 1650m above sea level.

The Khomas region borders four other regions, namely:

- ◇ Erongo – towards the west
- ◇ Otjozondjupa – towards the north
- ◇ Omaheke – towards the east
- ◇ Hardap – towards the south

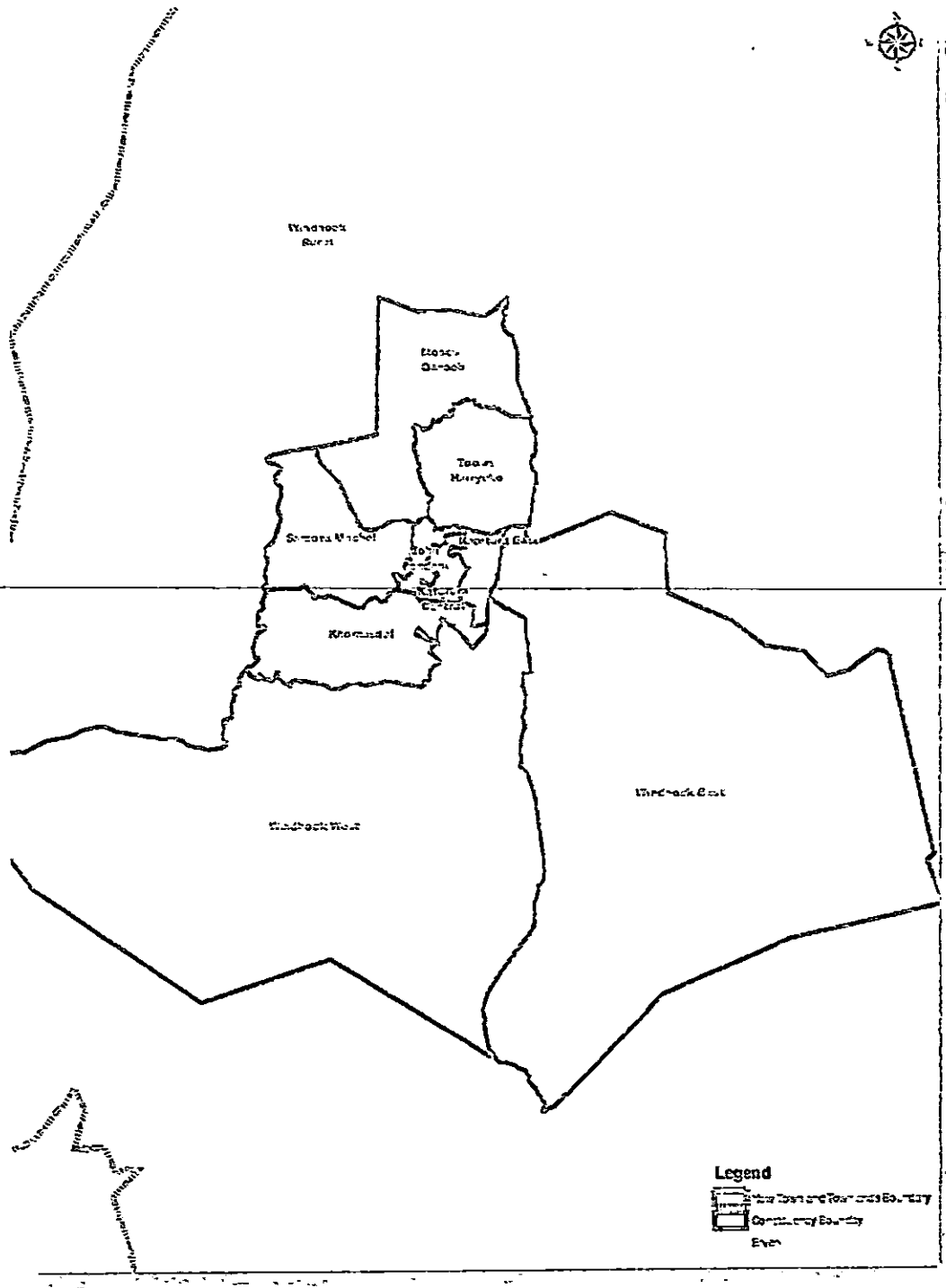
Map 1: Regions of Namibia

According to the Khomas Development Profile of 2015, the Khomas region covers a total area of 36,861 km², which is about 4.5% of the total area of Namibia. Map 2 illustrates the city's position in the Khomas Region based on its current and previous demarcation, while Map 3 shows the constituencies within the city.



Map 2: Windhoek's Position in Khomas Region based on New and Old Demarcation

Source: (Urban Dynamics, 2019)



Map 3: Windhoek Constituency Boundaries

Source: (Urban Dynamics, 2019)

2.3. Study Methodology

377

This study focused on identifying economic development opportunities, utilising a sectoral comparative advantage approach as illustrated section 3.3 on page 33 by which research method (survey). Where comparative advantages were identified and where data allowed for analysis, the opportunity was further investigated by identifying which constituency had the best spatial comparative advantage.

2.4. Document Structure

2.4.1. Strategy

The focus of the strategy document has the following chapters:

Chapter 1: Introduction, purpose and rationale of the study

Chapter 2: Overview of the status quo profile, including policy framework, key issues and comparative analysis.

Chapter 3: WED Strategic Framework

Chapter 4: WED Implementation Plan and Monitoring and Evaluation Framework

3. Summary of Status Quo³⁷⁸

3.1. Policy Framework

The policy framework provided the legislative framework within which the study was conducted.

3.2. Key Issues

3.2.1. In-Migration

In-Migration is a phenomenon that is taking place all over the world. People migrate to areas which they perceive to have better socio-economic opportunities. In Windhoek's case, many people from outside of Khomas move to the area for better job opportunities (or lack of job opportunities in their own area), education, health care, etc.

It is estimated that the Khomas population in 2018 was between 431,938 and 433,939 of which between 415,074 and 416,997 lived in Windhoek. It is projected that in 2030 the Khomas population will be between 644,073 and 654,550 of which between 626,229 and 636,416 will live in Windhoek. This implies that the population is likely to increase by about 50% in 12 years. (NSA and calculations by Urban-Econ)

This will have a serious impact on spatial planning and housing, local transport, food and water security, education and health institutions, and the local economy in the city. Some of these issues will be briefly discussed below:

- ◆ The impact of in-migration on the economy depends greatly on the skills of the migrants. Skilled migrants are highly sought after as these individuals can greatly contribute to the economy, while unskilled labour generally tends to be a burden on the host. Based on the national education profile, it is expected that the city will receive predominantly unskilled labour.
- ◆ In-migration of unskilled labour may result in Windhoek having a huge pool of cheap labour.
- ◆ In-migration will increase consumption and market demand within the city.
- ◆ In-migration can have an impact on social cohesion. While globally it is accepted that a multi-cultural society is normally good for a city, on occasions it can lead to friction, discrimination and violence amongst cultural groups.
- ◆ In-migration tends to lead to considerable leakage, especially amongst labour migrants where one person will move and work in the city but will send a proportion of his or her income to their non-migrant family.
- ◆ Housing demand will increase significantly. This demand will predominantly be below entry level which is not financially feasible for the private sector to supply.
- ◆ The city will experience increases in local transport demand. Since a large proportion of people are dependent on taxis for transport, the city may experience an increase in congestion as the number of taxis increase to meet demand.
- ◆ In-migration will place strain on resources and infrastructure. This will especially be felt with bulk infrastructure and services such as healthcare, education and policing.
- ◆ In-migration will place strain on water and food security.
- ◆ In-migration will test the effectiveness and enforcement of local policies and by-laws. This will especially be felt with informal and backyard dwellings, illegal connections and urban sprawl.

With the average rainfall at about 350mm p.a. and the nearest perennial water source over 700 km away, water is an ever-present concern in Windhoek. CoW is responsible for water supply, sewage collection and treatment for each of the city's 22 localities. CoW covers about 99% of households for water and about 75% for sewage. (Scheepers, 2017)

Water is supplied to the City from multiple sources. The main source of supply is surface water from the 3-dam system (Omatako-Swakoppoort-Von Bach) which is supplied by NamWater. The water from the 3-dam system is treated by NamWater at the Von Bach Water Treatment Works (VBWTP) near Okahandja, from where it is transferred to Windhoek by the Von Bach – Windhoek Transfer Scheme. NamWater can augment this system with groundwater from the Karst area through the Eastern National Water Carrier during emergency drought periods.

The City of Windhoek augments the water supplied by NamWater with groundwater abstracted from the Windhoek Aquifer through the CoW's own boreholes. In addition to this CoW also makes use of the following unconventional water resources:

- ◊ Direct potable water reclamation through the New Goreangab Water Reclamation Plant (NGWRP);
- ◊ Reclamation of semi-purified water used for restricted irrigation;
- ◊ Managed Aquifer Recharge of the Windhoek Aquifer with surface water which can be abstracted during periods of drought.

The City has an existing water demand in the order of 30 million m³/annum of potable water (82,200 m³/day). Of this, about 75% is supplied by NamWater, Namibia's national bulk supplier from surface water sources. During 2015, CoW sourced and supplied 4% from around 50 boreholes and 22% from the water reclamation plant, as well as 4% non-potable reuse for irrigation. CoW can reclaim approximately 5.09 million m³ of water/annum. (Scheepers, 2017)

CoW's ability to supply water is vulnerable to both drought and increased rainfall intensity (Scheepers, 2017):

- ◊ Drought:
 - Reduced rainfall and increased evapotranspiration → reduce available water from surface water sources and groundwater resources → a reduced volume of treated wastewater and water available for reclamation.
 - Industries may be affected, which has a knock-on effect on the economy.
- ◊ Increased rainfall intensity:
 - Potential to damage the catchment areas and increase the siltation of surface water resources.
 - Flooding can directly affect the ability of assets to work.
 - Flooding and increased rainfall intensity can lead to ingress into sewer systems, potentially overwhelming them and hydraulically overloading wastewater treatment plants and polluting of downstream surface water resources.

It is evident that Windhoek currently has a lack of water resources that are vulnerable to both droughts and increased rainfall intensity. This will also affect economic development as CoW will have to make several difficult choices regarding this resource. This may include excluding water-intensive industries from its industry mix.

It should be noted that several projects are currently being investigated on a national and regional scale to ensure sustainable and resilient water supply to the Central Areas of Namibia (CAN) including Windhoek. NamWater is currently investigating the implementation of the following large-scale projects that will ensure sustainable water supply to Windhoek:

- ◊ Desalination and transfer of water from the Central Coast to CAN;
- ◊ Okavango River abstraction and link to Eastern National Water Carrier;

In addition to these projects CoW is also busy with the investigation and possible near future implementation of the following projects to increase the long-term water supply and resilience (City of Windhoek Bulk Water:

- ◇ The extension of Gammams Waste Water Treatment Plant to increase the wastewater treatment capacity. In addition, it is planned to increase the direct potable reuse capacity with the expansion of their reclamation facilities. These two plants will have a direct influence in the security of supply of potable and possibly semi-purified water which will have a positive effect on the current developments in and around Windhoek;
- ◇ The establishment of the final Managed Aquifer Recharge (MAR) system which will enhance and make the Windhoek Aquifer a possible sustainable water resource;
- ◇ The establishment of pre-treatment for some borehole sources;
- ◇ Expansion of the Semi-Purified supply system to better harness the available capacity within the Goreangab dam.

3.2.3. Food Security

The lack of agriculture in and near the city directly influences food security. In 2018, the Khomas Region had about 133,740 households, while the average household consumption in Namibia amounted to about N\$119,065.00 per annum. (City of Windhoek Bulk Water: Husselman, S; Theron, J J; Adams, R)

About 36% of all household income is spent on food and beverages. Using these figures, it is estimated that households in the Khomas Region consume about N\$5.7 billion p.a. on food and beverage. The Khomas Region, on the other hand, had only produced N\$4.26 billion of agricultural produce in 2011, which may have declined since nationally, the industry had declined by 2.67% p.a. between 2011 and 2016. (Namibia Statistics Agency, 2019)

3.2.4. Housing

Housing is and will remain a serious concern in Windhoek. A significant share of households already lives in informal communities, predominantly towards the north and north-west of the city. It is estimated that about 31% of households in the Khomas Region lived in improvised housing units or shacks in 2011. If this rate persisted, then 41,459 households in the Khomas Region would have lived in shacks in 2018. The influx of people that will be accelerated by in-migration will create significant additional demand for housing. If current growth rates are considered, then by 2030, the city may require an additional 50,000 to 65,000 housing units.

3.2.5. Budget constraints

The financial constraints being experienced hampers serviced land delivery across all income housing brackets in the City. Serviced land delivery has experienced a backlog, which in turn inflated property prices. During the past few years, various commitments to social servicing projects has been undertaken with little or no return.

Like in most cities, the citizens of Windhoek spend a significant portion of their income on transport and communication. About 7% of household consumption in 2011 was spent on transport, which is more than health and education consumption combined. It is estimated that in 2018, about N\$1.1 billion was spent on transport and communication in Khomas. (Calculated from data from Namibia Statistics Agency (NSA), 2018)

3.2.6. Transportation

3.2.6.1. Roads/Transportation Network: Planning

◇ Historical Planning:

Windhoek is currently experiencing very large road network upgrades and expansion under the auspices of the Roads Authority. The planning was already concluded in the early 1970's between the then Ministry

of Works and Transport and the CoW's City Engineers department. With that planning the necessary land could be reserved and all new township development was formed accordingly.

Thereafter the planned road network was upgraded and expanded on an ongoing needs basis. The vision and foresight of the roads engineers from that era is commendable.

Thereafter transportation/traffic studies were done on a regular basis to update and to be revised in the five (5) year implementation plans.

◇ **Current Planning:**

Although the City already has a reasonable urban transport system, there is significant room for improvement.

The Sustainable Urban Transport Master Plan (SUTMP) was completed in 2013 which recommended an implementation plan of various projects to be developed in order to keep up with the City's rapid expected population growth rate, which will inherently enable economic development. The SUTMP implementation plan included cross-cutting measures, public transport measures, non-motorised measures and transport management measures with specific projects to be implemented across the period from 2013 to 2033 (and beyond). (Deutsche Gesellschaft für Internationale Zusammenarbeit -giz, 2013)

The last major arterial road upgrade was done in 2004, being the extension of Robert Mugabe Road to the north although traffic density continues to grow.

Although some of the initial SUTMP projects, such as the compilation of the NMT Strategy, were implemented, the implementation of the SUTMP plan fell behind the proposed programme due to the CoW's budgetary constraints and inherently demotes economic development to keep up with the City's growth rates.

The delay in the implementation of the SUTMP plan are mainly attributed to financial constraints and insufficient budgetary allocation towards transport development.

There are also a few planned but not yet implemented road links that places a specific strain on the effectiveness of the traffic flow of the Windhoek road network. This can be attributed to road projects not receiving sufficient budgetary allocation in the Council's budget.

◇ **Future Planning:**

From a developer's view point, confidence is looked-for, i.e. 'will my development have a permanent good access'. Secure access remains the most important item when considering development. The absence of an updated and active transportation plan needs to be addressed to create developers trust.

3.2.6.2. Public Transport Modes:

The main constraint for public transport is relative low residential densities, which increases the cost of operating public transport systems. The Origin Destination matrix is also complex dispersed with limited strong trend lines. In addition, there is limited alternative transport infrastructure such as non-motorised transport (NMT) infrastructure.

The focus is on creating interaction and liaison between the different modes of transport in the planning and operations stages. The different modes of transport in Windhoek are discussed below:

◇ **Rail**

Studies were done on the feasibility of commuter rail between the CBD and Katutura. This includes the external rail: From Windhoek to Rehoboth. However, implementation is yet to commence.

◇ **Bus**

The "move Windhoek" initiative resulted in a large expansion in the number of municipal busses in Windhoek. Routes still need to be optimised in an ongoing effort as demand increases.

◇ Taxi

Taxis are fulfilling a very important role of unsubsidised transport service. However, there is a need to control quality and safety. The value taxis are adding should not be underestimated. A sedan car remains a popular choice as a taxi.

◇ Non-Motorised Transport

CoW has prepared a NMT strategy in conjunction with the GIZ and the Ministry of Works and Transport. The implementation plan of the NMT Strategy is broken up into a number of phases of which a part of the 1st phase implementation is under consideration as a pilot project.

3.2.6.3. Roads vs Transportation Corridors:

Reference to "road network" has become outdated; the more correct reference should be "transportation corridors".

It is often said that "no more roads should be built", but the reality is the better the roads the better the other transport modes can operate.

3.2.6.4. Financing of transport corridors:

The Urban Arterial Account (UAA) was instituted in the late 1990's to secure and to allocate dedicated funds for roads to the Account. The rationale was that with rezoning, betterment and endowment fees the "roads" component of these payments was allocated to the UAA. However, the payments were redirected to other equally important needs of Council. However, the UAA is an opportunity to further expand the road network of Windhoek.

3.2.6.5. Funding options:

The greater part of Windhoek was since the early 1970's, developed on a self-sustainable basis through dedicated "township development" funds. For each specific township development a dedicated development fund/suspense account was created. Infrastructure development was pre-financed from the funds and expenses were recovered through the selling of erven and all profits were to the benefit of Council at the time.

Public Private Partnerships (PPPs) provide an alternative source of funding for Council to consider, however this will result in Council sharing the costs, risks and profits in a project.

3.2.6.6. Budget:

3.2.7. Council has a consultative budget process, inclusive of community representatives, Constituency Councillors, the Khomas Regional Council and business associations. The new budget format introduced recently aims to have a more "modern" private sector approach using formats in line with what financial institutions would require if funding is considered.

Several key stakeholders mentioned that improving processes by making them simpler, faster and more reliable will serve as an incentive to conduct more business with CoW. One feasible drive towards the SMART City vision is the Information and Telecommunications Department's fibre optic data network project to connect each and every citizen and business, with the fibre optic network acting as economic enabler for everything else such as water- and electrical metering, intelligent traffic flow management and other SMART services.

The implementation of these services supports the Harambee Prosperity Plan and should be fully implemented by 2030.

Based on data from the Namibia Statistics Agency (NSA), Namibia's population has low levels of education, with only 21.9% of females and 23.3% of males over 15 years of age having completed secondary education and an additional 8.1% of females and 7.8% of males having completed tertiary education in 2016. (Namibia Statistics Agency (NSA), 2018)

The city has good educational infrastructure with several primary and secondary schools and the presence of the University and Vocation Training Cluster (UNAM, NUST, IUM) This cluster provides the City with a comparative advantage within education and skills compared to the rest of Namibia.

3.2.9. Tourism

Tourism has been a key enabler for economic development and one of the fastest growing sectors worldwide. The T&T sector created one in ten new jobs globally. In Namibia, the tourism sector grew by 0.3% in 2019, outperforming overall GDP which contracted amidst a recession (World Travel & Tourism Council, 2020). The Namibian government recognises the sector's potential for growth and contribution to GDP and included it in

NDP-5 and through MET's development of specific plans to increase the T&T sector's value proposition. However, the impact of the current Covid-19 pandemic is disastrous particularly for the tourism industry and has caused significant economic losses especially to Namibia and its tourism industry. The Namibian tourism industry will have to transform in order to become more resilient and will have to focus on a strategy of sustainable development in conjunction with disaster risk reduction and climate change. Despite the growth experienced in the sector before Covid-19, Windhoek has not fully positioned itself as a destination for tourism and finds itself largely acting as a transit city for tourists travelling across Namibia. Leisure tourists had an average length of stay in Windhoek of 1 night, compared to 2 to 3 nights by business travellers and 4 nights by conference attendees, consequently, Windhoek as a city does not benefit as much as it could from tourism. The economic value generated from tourism is wide and far reaching and would improve the livelihoods of the city's residents as it creates opportunities for increased economic activity.

Windhoek has the potential to provide a good tourism products and services to visitors. As a main port of entry, the City has the opportunity to leverage this advantage by creating a tourist product that will captivate the tourists for a day or two after they arrive and before they leave.

The main constraint to tourism is underdeveloped tourism sites and attractions that needs to be upgraded and made more appealing to the public and tourists.

3.3. Sectoral Comparative Analysis

This section will briefly analyse the Khomas Region economy utilising gross domestic product (GDP) official data for Namibia and calculated data for Khomas Region.

The Khomas Region has a very diverse economy predominantly centred on secondary and tertiary sector industries. In terms of GDP, the largest industries in the Khomas Region are public administration and defence (11.52%), manufacturing (10.58%), education (8.24%), health (7.37%), and financial intermediation (5.24%).

Table 3-1: Summary of Namibia and Khomas Industry GDP data 2011

	Calculated Khomas GDP (in N\$ M) - 2011	Industry contribution to Khomas GDP - 2011	Namibia (in N\$ B) - 2011	National Contribution to GDP - 2011	Khomas Contribution to Industry - 2011	National Annual Growth Rate 2011 - 2016
Agriculture	108.93	0.40%	4.26	5.2%	2.56%	-2.67%
Fishing			2.73	3.4%		0.51%
Mining and Quarrying	1,343.81	4.95%	8.1	10.0%	16.59%	1.49%
Manufacturing	2,870.05	10.58%	10.91	13.4%	26.31%	-0.88%
Electricity and Water	310.03	1.14%	1.56	1.9%	19.87%	6.53%
Construction	673.58	2.48%	3.03	3.7%	22.23%	12.83%
Wholesale and Retail Trade	1,127.57	4.16%	9.83	12.1%	11.47%	8.63%
Hotels and Restaurants	101.20	0.37%	1.56	1.9%	6.49%	7.60%
Transport and Communication	1,174.70	4.33%	4.44	5.5%	26.46%	6.63%
Financial Intermediation	1,422.61	5.24%	4.86	6.0%	29.27%	8.48%
Real Estate and Business Services	191.99	0.71%	7.53	9.3%	2.55%	3.86%
Community, Social and Personal Services			2.49	3.1%		-2.36%
Public Administration and Defence	3,125.54	11.52%	9.58	11.8%	32.63%	4.75%
Education	2,236.19	8.24%	6.89	8.5%	32.46%	5.09%
Health	2,001.13	7.37%	2.67	3.3%	74.95%	10.41%
Private Households with Employed Persons	214.12	0.79%	0.93	1.1%	23.02%	1.86%

Source: NSA, 2018 and Calculations by Urban-Econ, 2019

Note: Khomas Regional Industry data was calculated using employment data and Urban-Econ's Namibian Multipliers

Apart from agriculture and fishing (2.56%), real estate and business services (2.55%), and hotels and restaurants (6.49%), Khomas' industries contributed between 11.47% and 74.95% to their respective national industry GDPs. This indicates that, based on scale, Khomas Region has a comparative advantage in almost every industry. Khomas has significant comparative scale advantages in health (74.95%), public administration and defence (32.63%), education (32.46%), financial intermediation (29.27%), transport and communication (26.46%), manufacturing (26.31%), private households with employed persons (23.02%), and construction (22.23%).

Several industries showed significant annual growth between 2011 and 2016. The construction industry grew by 12.83% between 2011 and 2016, followed by health (10.41%), wholesale and trade (8.63%), financial intermediation (8.48%), hotels and restaurants (7.6%), transport and communication (6.63%), and electricity and water (6.53%).

Table 3-2 summarises the comparative industry advantages that Khomas Region have, including the comparative importance of the industry in Khomas, the comparative scale of the industry in Khomas Region compared to Namibia, and the growth rate of the industry in Namibia.

Table 3-2: Summary of Comparative Industry Advantages for Khomas Region

	Importance of Industry in Khomas	Comparative Scale Advantage over rest of Namibia	Industry Growth in Namibia
Agriculture			
Fishing			0.51%
Mining and Quarrying	4.95%	16.59%	1.49%
Manufacturing	10.56%	25.31%	
Electricity and Water		19.87%	6.53%
Construction	2.48%	22.23%	12.53%
Wholesale and Retail Trade	4.16%	11.47%	8.63%
Hotels and Restaurants			7.53%
Transport and Communication	4.33%	26.45%	5.63%
Financial Intermediation	5.24%	29.27%	8.48%
Real Estate and Business Services			3.86%
Community, Social and Personal Services			
Public Administration and Defence	11.52%	32.63%	4.75%
Education	8.24%	32.46%	5.09%
Health	7.37%	74.95%	10.41%
Private Households with Employed Persons		23.02%	1.66%

Source: NSA, 2018 and Calculations by Urban-Econ, 2019

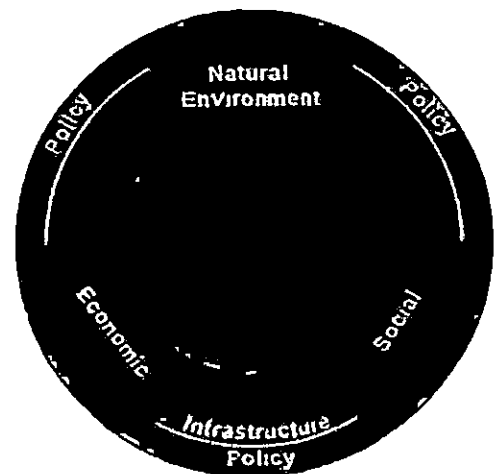
Green indicates best performers, Yellow indicates intermediate performers, Red indicates worst performers

4. WED Strategic Framework

Economic development is one component of sustainable development. Although this strategy focuses on economic development, it must always take cognisance of cross-cutting goals which promote and protect the environment, the people who live in the City, infrastructure, and the policy and institutional environment within which CoW operates.

The most crucial cross-cutting strategic goals identified are:

- ◇ To protect the city's natural resources, especially water
- ◇ To densify specific areas within the city
- ◇ To increase connectivity, access to opportunities and spatial justice
- ◇ To ensure food security and social cohesion
- ◇ To ensure efficient and cost-effective service delivery



Within this context, CoW's economic development goals are:

- ◇ To create a sustainable economy
- ◇ To leverage key sectoral comparative advantages
 - Strategic importance to local economy
 - Scale advantage
 - GDP growth rate advantage
- ◇ To create employment opportunities

The below outcomes as indicated by Figure 3 are expected should the Windhoek Economic Development Strategy be implemented in its entirety.

Figure 3: WED Strategy Outcomes

Taking cognisance of the cross-cutting and economic development goals, the overall vision of becoming a SMART and CARING city, and CoW's economic development outcomes, Figure 4 illustrates the Windhoek economic development (WED) strategic pillars.

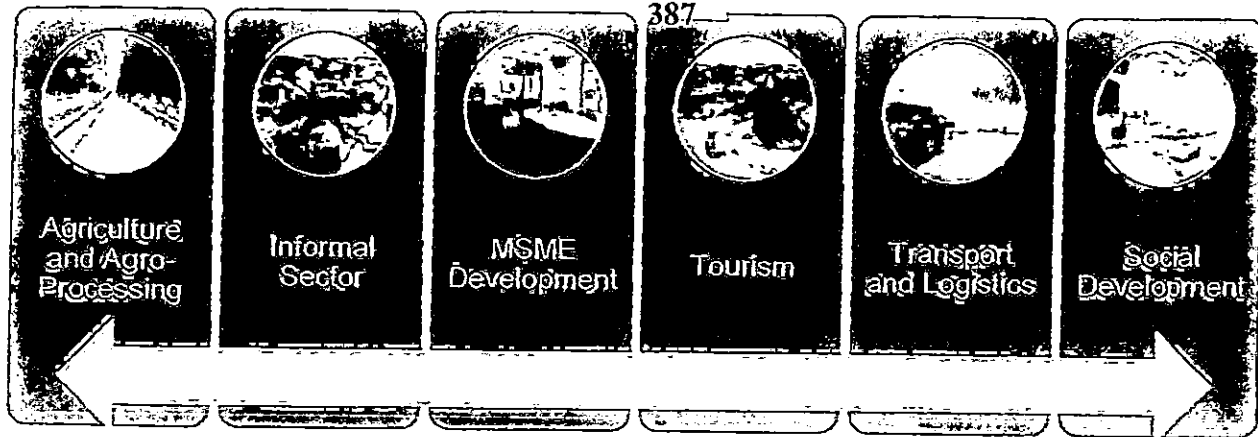


Figure 4: WED Strategic Framework

Table 4-1: Strategic Intervention Programmes and Projects

Strategic Intervention	Programme	Project
Agriculture and Agro-Processing	Increase Water Recovery	<ul style="list-style-type: none"> • Increase non-potable water recovery for agricultural use • Boreholes
	Access to Farmland	<ul style="list-style-type: none"> • Review farmland access and availability in Windhoek • Identify municipal farmland close to existing non-potable water infrastructure for aquaponic and hydroponic farming
	Increase Water Supply to Selected Farmland	Water pipeline for potable and/or non-potable water between water plant and cluster of farms
	Increase Agriculture Stakeholder	<ul style="list-style-type: none"> • Schedule agriculture and agro-processing sessions as a regular feature in the Economic Development and Investment Forum (see section 4.6.9) • Partner with agriculture and agro-processing stakeholders such as existing commercial farmers, academic institutions to improve agricultural produce production (genetics, technology, methods, etc.) within the City • Conduct an Agriculture Cultivation and Agro-Processing Strategy study to identify the best crops, freshwater fish and livestock options for the City. • Support aquaponic and hydroponic farmers: <ul style="list-style-type: none"> ◦ Rent available CoW-owned agricultural land to aquaponic and hydroponic farmers ◦ Supply these farms with non-potable water infrastructure • Increase livestock (egg/layer, and pig) production <ul style="list-style-type: none"> ◦ Rent available for agricultural land to livestock farmers ◦ Ensure that these farms have the required water rights ◦ Supply these farms with water infrastructure (e.g. boreholes) to ensure water suitable for livestock production • Support organic agriculture produce production • Support household agriculture/roof gardening, etc.
	Increase Agricultural Produce (crops, organic and livestock)	
	Value Chain Development of Agricultural Produce	<ul style="list-style-type: none"> • Develop Agricultural Produce Value Chains <ul style="list-style-type: none"> ◦ Conduct market value-chain studies (local and export supply and demand studies) for all selected crops ◦ Identify potential agro-processing investment opportunities ◦ Identify potential agro-processing investors
Transport and Logistics	Agro-Processing Logistics Support Structures	Support the Fresh Produce Hub (AMTA)
		<ul style="list-style-type: none"> • Upgrade Logistics Hub such as truck stop, rail yards, air cargo and piggyback infrastructure • Upgrade Rail Support Services such as rolling stock maintenance yard and marshalling yards • Review Warehousing
	Local Public Transport	<ul style="list-style-type: none"> • Review of Transport Plan (together with Spatial Development Framework) <ul style="list-style-type: none"> ◦ Transport node developments ◦ Transport route developments ◦ Airport-tourist hub bus route ◦ Licensing of private sector operators in tourist areas
	Implement Non-Motorised Transport Plan	<ul style="list-style-type: none"> • Implement Non-Motorised Transport Plan <ul style="list-style-type: none"> ◦ Pedestrian walkways ◦ Cycling lanes

Strategic Intervention	Programme	Project
Tourism	Tourism Attraction Development (to be aligned with the CoW Tourism Strategy (PWC Namibia, 2019))	<p>Circular Walkable Tourist Route</p> <ul style="list-style-type: none"> Develop circular walkable routes (with Route Markers) Employ qualified tour guides Develop a tour guide app (GPS prompts) Upgrade and develop tourist attractions (with attraction custodians) Transfer custodianship of attraction to CoW if required <p>Riverwalk Development</p> <ul style="list-style-type: none"> Theatre Boutique retail Hotels Restaurants Entertainment area
	Tourism Transport	<ul style="list-style-type: none"> Develop tourist transport between tourist attractions <ul style="list-style-type: none"> Bus service to airport Licensing of transport operators on and between tourist attraction routes, e.g. Tuk-tuk service, red bus, etc.
	Tourism Zoning Tourism Grading and Marketing	<p>Rezone businesses in tourism areas</p> <ul style="list-style-type: none"> Promote tourism grading Tourism Destination Marketing - Update CoW website's tourism section (or create a CoW tourism website) <ul style="list-style-type: none"> Create interactive content for the website (text, images, videos) <ul style="list-style-type: none"> Walkable routes Windhoek tourist attractions Events Accommodation Restaurants Search Engine Optimisation Review Tourism Signage Relocate Tourism Information Centre Basic tourism skills short courses, e.g. food preparation, receptionist training, housekeeping, etc.
	Tourism Skills Training	<ul style="list-style-type: none"> WED and Investment Forum Create or support a 'Buy Windhoek' programme Local procurement should be prioritised by CoW's supply chain.
MSME	Local Forums Localisation	<ul style="list-style-type: none"> Include a MSME support desk inside the Business Development / Investor Liaison Desk <ul style="list-style-type: none"> Assist small businesses to apply for national incentives. Assist small businesses with marketing and promotion Compile an online Business Directory Assist with Business Email and Websites Develop a hierarchy of MSME infrastructure such as incubation centres, intermediate industrial and business stalls and small industrial complexes <ul style="list-style-type: none"> Upgrade selected informal markets Develop public facilities near informal markets
	MSME Support and Promotion	
	Informal Trade Support	
	Improved Wi-Fi Connectivity Partner with MSME Development Agencies	<p>Roll out Wi-Fi hotspots</p> <ul style="list-style-type: none"> Partner with Development agencies such as NCCI Khomas Region, NUST, etc. on: <ul style="list-style-type: none"> Research and Development Entrepreneurship and Incubation Innovation Marketplace Marketing and Promotion
	Reduce Red Tape	<ul style="list-style-type: none"> Review permit processes Develop e-systems for the following processes: <ul style="list-style-type: none"> Dealing with Construction Permits Applying for Electricity Registering Property Certificate of Fitness Develop e-systems for applying for: <ul style="list-style-type: none"> a Liquor license permits to sell food
	Export Development	<ul style="list-style-type: none"> Develop an Export Strategy (Coordination of local products for export development with the International Trade Development Directorate under MITSMED.) <ul style="list-style-type: none"> Identify local businesses that produce products that could potentially be exported Identify potential markets for locally produced products including: leather, cosmetics, etc.

Strategic Intervention	Programme	
Social Development	Housing	<ul style="list-style-type: none"> o Densification of Housing Precincts o Identify available land for development o Re-activate an integrated erf development and servicing programme o Low-Cost Municipal Rental Housing o Repurposing under-utilised buildings o Encourage private sector involvement in below-entry-level housing market
	Health and Care Precinct	<ul style="list-style-type: none"> o Hospital o Health Care Precinct <ul style="list-style-type: none"> o Clinic o Training college for nurses o Housing for nurses and students o Shelter for the homeless o Soup kitchen o Hospice o Place of safety for women and children o School (with hostel) for the physically and mentally handicapped o Training facility for the physically and mentally handicapped o Mental healthcare, treatment and rehabilitation centre o Psychiatric institution
	Retirement Precinct	<ul style="list-style-type: none"> o Retirement Village <ul style="list-style-type: none"> o Self-care housing units o Assisted living units o Dependent living units o Frail care units o Low-cost retirement units

4.1. Strategic Intervention: Agriculture and Agro-Processing

4.1.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to increase the cultivation of agricultural products and to add value to this primary input through local manufacturing and processing plants. This is of strategic importance to reduce food security risk to the city.

4.1.2. Factors Influencing Agriculture and Agro-Processing

Figure 5 and Table 4-2 illustrate several factors that influence the market attractiveness for agriculture and agro-processing in the city.

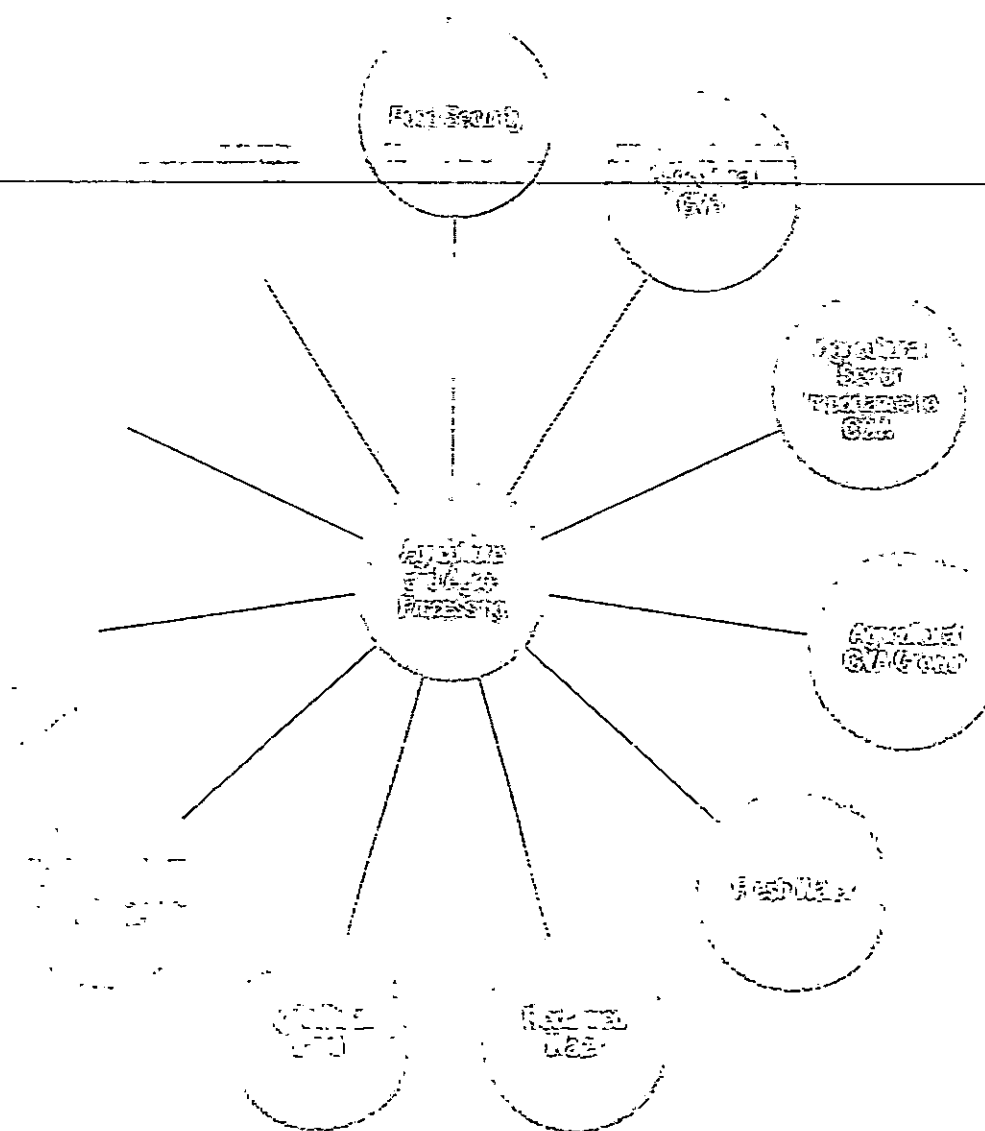


Figure 5: Factors Influencing Agriculture and Agro-Processing

Table 4-2: Factors Influencing Agriculture and Agro-Processing

Indicator	Rating	Comment
Food Security		About 36% of all household income is spent on food and beverages, which translates into about N\$5.7 billion of food and beverages being consumed in the City in 2018. Based on current population growth rates, this may increase to N\$8.6 billion by 2030.
Agricultural GVA		Agricultural GVA in Khomas Region was about N\$108.93 million in 2011. Khomas Region contributed an estimated 2.56% of the national agriculture GVA.
Agricultural Sector Importance to CoW		The agricultural sector in Khomas Region contributed about 0.40% of total GVA in Khomas Region in 2011.
Agricultural GVA Growth		The national agriculture sector GVA growth was about -2.67% p.a. between 2011 and 2016.
Fresh Water Availability		Water supply is an ever-present concern in the City. The region receives about 350mm rainfall p.a. and the nearest perennial water source is over 700km away.
Reclaimed Water		In 2015, CoW could reclaim approximately 5.09 Mm ³ /a of water or about 22% of water required. In addition, about 0.92 Mm ³ /a of non-potable water was produced for irrigation.
Agricultural Land Availability of Agricultural Produce		After demarcation, the new City boundaries include some agricultural land. Agricultural GVA suggests that limited agricultural produce is cultivated in CoW and Khomas Region.
Manufacturing GVA		Manufacturing GVA in Khomas Region was about N\$2,870.05 million in 2011. Khomas Region contributed an estimated 26.31% of the national manufacturing GVA.
Manufacturing Sector Importance to CoW		The manufacturing sector in Khomas Region contributed about 10.58% of total GVA in Khomas Region in 2011.
Manufacturing GVA Growth		The national agriculture sector GVA growth was about -0.88% p.a. between 2011 and 2016.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; Red = Poor; Yellow = Average; Green = Good

4.1.3. Introduction

The Agriculture sector comprises forestry, horticulture, crop and livestock farming. Agro-processing involves the transformation of raw-materials from primary agriculture into finished or semi-finished products ready for use by the end user or immediate user. This process of transformation involves seven distinctive processes which include fermenting, slaughtering, blending, moulding, cutting, milling and packaging. Figure 6 below shows an overview of typical linkages between agriculture and the agro-processing sector.

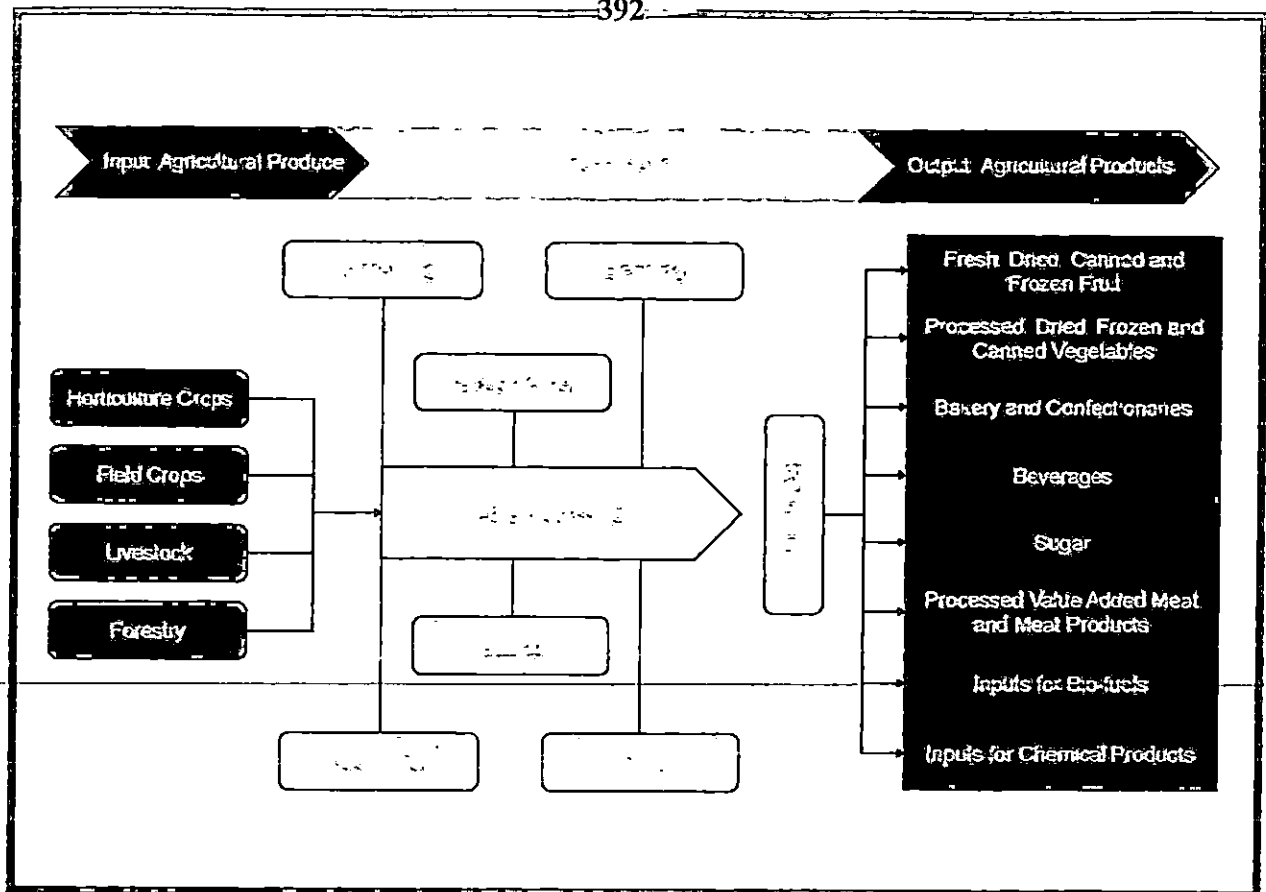


Figure 6: An Overview of the Agro-processing Sector

Source: (Agridelight Training and Consulting, 2012)

4.1.4. Food Security

Windhoek will experience an increase in demand for food and agricultural produce. Households spent about 36% of household consumption on food and beverages in 2016. Using average household consumption (N\$119 065 per annum in 2016), population (between 415,074 and 416,997 in Windhoek in 2018) and household size data (3.62 in 2018), it can be calculated that just over N\$4.9 billion was spent by households in Windhoek on food and beverage in 2018. Using population predictions, the household consumption of food and beverage in Windhoek will increase to about N\$7.5 billion in 2030, assuming that household consumption remains constant.

4.1.5. Water and Land Resources

Due to water constraints, the focus will be on agricultural produce and agro-processing that doesn't use large quantities of water. Depending on the locality of agricultural land to be identified by the Windhoek Spatial Development Framework, additional **bulk infrastructure** could be required to pipe the water to these **clusters of agricultural land**.

Modern horticultural farming techniques such as **aquaponics**, **hydroponics**, vertical farming and greenhouses utilise significantly less water and land than traditional farming methods. According to an article published in *Farmers Weekly*, titled **Hydroponic water requirements**, hydroponic production systems require only 10% to 16% of the water needed to produce the same volume of vegetables as conventional irrigation farming methods do. (Venter, 2017)

393
By making use of these innovative farming techniques the demand on existing potable water distribution and reticulation infrastructure could be managed to have negligible impact. Further options to be considered, includes:

- CoW to implement a vigorous leakage detection campaign on its aging water network as the volume of real losses (non-revenue water) could be significant. Water saved through reduction of leaks can be efficiently diverted to income generating water efficient urban agriculture projects. The outcome of a leak detection and remedial campaign is increased revenue water and increase food security for the City.
- Allowance of on-site water storage with water off-takes from the municipal distribution networks only during off-peak demand periods and only at allowable flow rates (draw-off rates).
- Allowing urban agricultural farmers within the catchment area of the Goreangab dam to practice rainwater harvesting as this valuable resource ends up being polluted once reaching the dam.

Semi-purified water

The pilot project at Dagbreek School in Klein Windhoek is a good example of growing fresh produce and fish with aquaponics practices using semi-purified water, although still practiced on small scale.

Crops can be selected to match the water quality and farming practices can be selected to meet the requirements of the Ministry of Agriculture, Water and Forestry for the reuse of water for agricultural production. If required, additional water treatment can be done at the farming sites by the farmers, depending on the crop selection. CoW already produces about 0.92 Mm³/annum of non-potable (semi-purified) water for irrigation, which can be increased at existing water plants, in line with the current strategic planning. This approach will economically harness the non-potable (semi-purified) water produced as a sustainable resource. (Scheepers, 2017)

The key constraint is shortage in supply of potable water from the three dam system by NamWater as a result of a prolonged drought period. Bearing in mind that the aquifer supply is not unlimited, that the actual yield is still theoretically determined and, that the water demand management actions are taken to curb consumption, the reclamation ability is also affected as a result of low inflow into the Gammams Waste Water Treatment Plant (GWWTP) However, an alternative supply source to the reclamation plant can be considered such as the Otjomuise Waste Water Treatment Plant (OWWTP).

During regular potable supply conditions, the capacity of the GWWTP is constraint as it is being operated over capacity during this times and an upgrade is needed to cater for additional effluent associated with economic development. (City of Windhoek Bulk Water: Husselman, S; Theron, J J; Adams, R)

Underground Water Sources

The availability and sustainable yield of underground water within the extended boundaries of the CoW should also further be investigated as a source of water for water efficient horticultural farming techniques.

4.1.6. Agriculture and Agro-Processing Stakeholders Engagement

The engagement of agriculture and agro-processing stakeholders to improve agricultural produce production (genetics, technology, methods, etc.) is crucial. The stakeholders include existing commercial farmers, aquaponics and hydroponics experts, NUST and other academic institutions, agriculture associations, agro-processors, existing and potential agriculture and agro-processing investors, etc. These engagements should be led by the Department of Economic Development and Community Services and may form part of the Economic Development and Investment Forum.

Another advantage of using aquaponics, hydroponics, vertical farming and greenhouse production systems is the wide variety of crops that can be produced. These include but are not limited to leafy greens (lettuce or salad), herbs (basil, chives, cilantro and oregano), tomatoes, mushrooms, onions, garlic, leeks, chives, shallots, ginseng and even bamboo. New aquaponics systems can produce both freshwater fish and a range of vegetables in an almost closed system that reduces the need for expensive nutrients.

The crops and livestock that will be the most suitable for the city needs to be determined through an agriculture cultivation and agro-processing strategy to ensure both local market appeal (the most effective crop production), and the most efficient use of water and land.

A good example (can serve as a pilot project) is Farm Krumhuk just to the South of Windhoek, run along bio-dynamic lines, with a strong focus on social development to produce in a sustainable and environmentally conscientious way to produce organic food whilst preserving the natural biodiversity of the land used.

This means that the principles followed are ecologically and socially sound and sustainable. Agricultural production at Krumhuk is divided into dairy farming, cow breeding, vegetable and herb cultivation and fodder & hayfields cultivation. A range of bio-dynamic products (certified 'organic') such as milk, quark (cottage cheese), vegetable and meat are produced. (Krumhuk, 2021) Agro-Processing Value Chains

The processing of raw materials from agriculture products in Windhoek would contribute significantly in expanding the manufacturing sector while alleviating the risk of food-security. The agglomeration of these activities can result in economies of scale that would increase both economic development and employment opportunities.

Note: To illustrate how the availability of agricultural produce could unlock value chains, this section will delineate the garlic and onion value chains AS EXAMPLES. A separate agricultural and market study is required to identify and delineate the exact agricultural commodities, farm areas, and related value chains suitable for Windhoek. Imports and exports are relevant to the value-chain description and Namibia has an advantage that it can export to EU at lower tariffs than many other countries.

4.1.7.1. Garlic Value Chain Development

Garlic Overview

According to Garlic Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, garlic is a close relative of the onion, which includes leeks, chives and shallots. In size and growth habit, garlic resembles the onion. Garlic has a history of human use of over 7 000 years, and it is native to central Asia. Besides onion, garlic is the most important bulb crop grown almost all-over South Asia. Garlic has been used throughout recorded history for both medicinal and culinary purposes. It is widely used for flavouring and seasoning dishes, pickles and sauces. The large amounts of garlic are produced in China and India. Garlic has become an increasingly popular vegetable in recent years among producers, marketers and consumers. Its long-acclaimed nutritional and medicinal values are proving to be valid. Different branches of traditional medicine and scientific studies have pointed to garlic as an antibiotic agent, immunity booster, and a blood pressure regulator. Garlic is often kept in oil to produce flavoured oil. However, the practice requires measures to be taken to prevent the garlic from spoiling. More people are discovering its culinary splendour, and producers have found garlic to be a potentially highly profitable crop.

Processing

According to Garlic Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing

(DAFF) of South Africa, garlic is a high-value crop that can be marketed as being fresh, dehydrated or as certified seed. It is widely used around the world for its strong flavour as a seasoning or condiment. The majority of garlic is dehydrated and used in a variety of processed foods. Garlic bulb can be peeled, sliced, flaked and dried. This can be packaged or processed further as food spice, vegetable mixtures and sprays. India also produces odourless oil and oleoresin from garlic. Garlic can be used externally for skin problems and fungal infections. Garlic is also claimed to help prevent heart disease (including atherosclerosis, high cholesterol, and high blood pressure) and cancer. Garlic is used to prevent certain types of cancer, including stomach and colon cancers. It is also used as insect repellent. Garlic is also alleged to help regulate blood sugar levels.

Garlic Value Chains

Garlic Market Value Chain Explaining Its Applications

Figure 7 illustrates different end-products after value adding and processing for garlic.

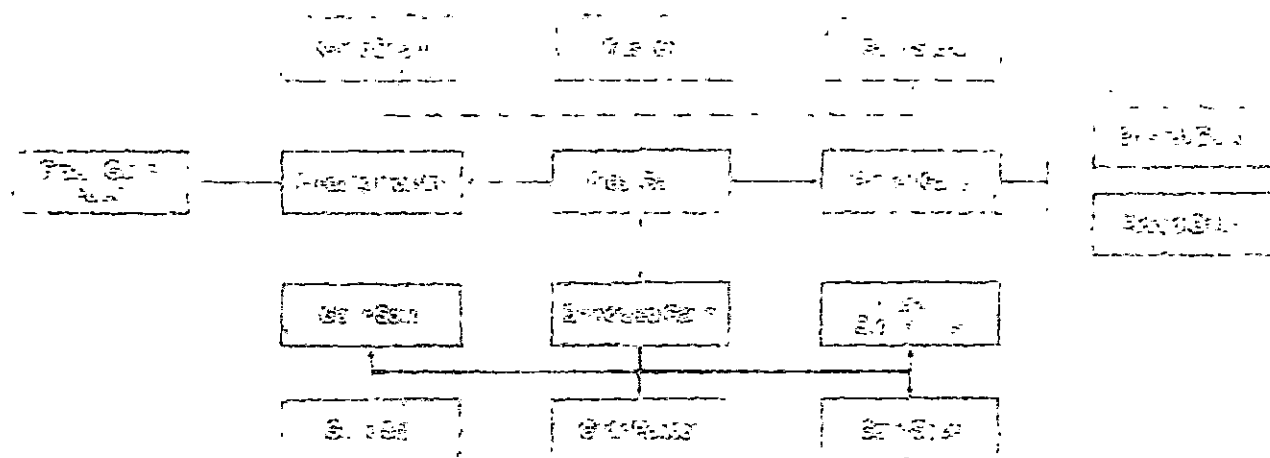


Figure 7: Garlic Market Value Chain Explaining its Applications

Source: Garlic Market Value Chain Report of 2016. DAFF South Africa

Garlic Market Value Chain

The market value chain for garlic is illustrated in Figure 8. The garlic value chain can be broken down into the following levels: the producers of garlic (farmers); pack house owners (dry, clean, grade and quality control); cold storage and transport facilities (store and transport garlic on behalf of farmers); traders in garlic (market and sell garlic); processors (add value by canning, oil extraction, dehydration and freezing of garlic, and processing garlic to other usable forms); and end users (consumers).

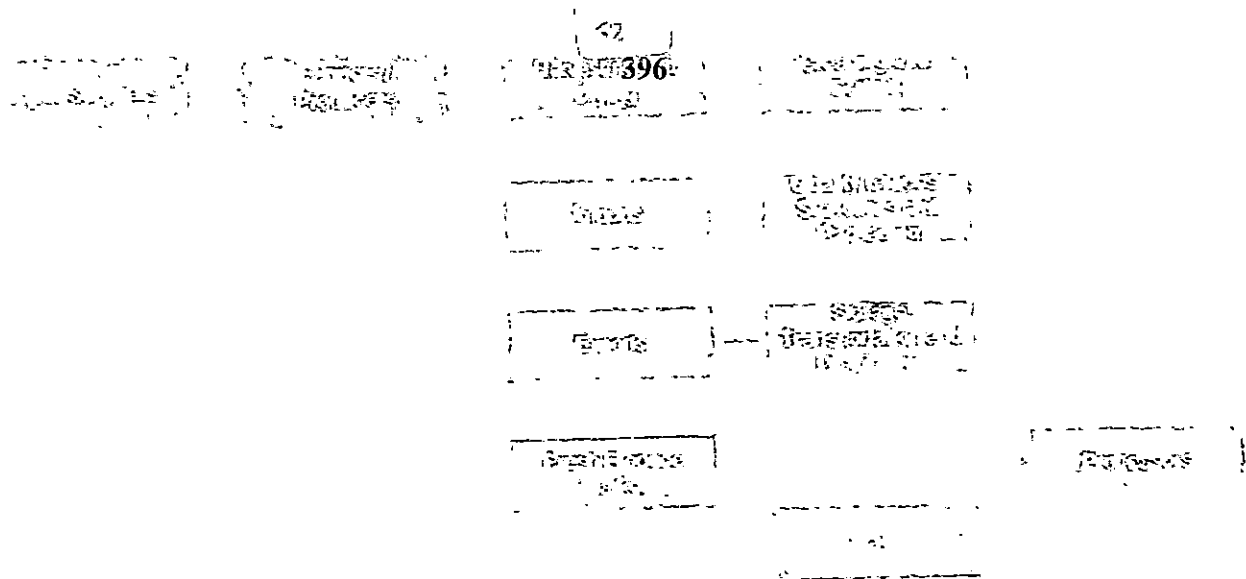


Figure 8: Garlic Market Value Chain

Source: (Department of Agriculture, Forestry and Fisheries - Republic of South Africa, 2016)

Tariffs on Garlic Exports

According to the report *A Profile of the South African Garlic Market Value Chain* of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, the Intra South African Customs Union (SACU), the tariff for Garlic Exports is 0% for fresh or chilled garlic.

Business Opportunities and Challenges

Opportunities

According to the Garlic Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, garlic consumption has increased significantly over the past years. The main uses of garlic are in the culinary field, although it has other uses in the alternate medicine field because of its medicinal qualities and function as a pesticide and fungicide. Recently there have been some more developments in the human medicine field for garlic, in which there is a compound which has been identified as lowering cholesterol. If these developments come to the commercial phase, it could mean a massive increase in garlic production.

Challenges

According to the Garlic Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, garlic is a high-risk, labour-intensive crop to grow successfully. In order to survive, each garlic producer must strive to obtain maximum yield and quality. Knowledge of the garlic plant, its growth cycle and the factors affecting its growth, yield and quality is thus of utmost importance. Marketing of garlic can also be quite difficult for the smaller producer. The market is demanding large, clean, unblemished bulbs that are well graded and well packaged. Namibian garlic producers will have to compete with cheap garlic imports.

Eggs Overview

According to the Egg Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, eggs remain one of the cheapest animal food proteins available to consumers. In terms of production, the commercial egg industry is stable by nature, meaning that although demand may decrease or increase, supply remains relatively stable as a result of the lengthy production cycle. A small excess supply leads to a rapid price decrease and a small supply shortfall will be reflected in a rapid price increase.

The two key factors impacting the demand for eggs are population and real income growth. Other factors, such as changing of lifestyles, egg production systems, and health scares have a role to play in influencing demand, but they are mainly evident in developed countries. In the developing countries, people are much less concerned about whether layers are kept in cages or not, or that eating eggs can have a negative impact on the blood cholesterol levels of a small proportion of the population, but other taboos exist that impact negatively on egg consumption.

Poultry layer/eggs value chain is relevant since:

1. The City has exponential population growth;
2. A large proportion of the population has a low income but still need protein, and;
3. The City has an established industry, which shows that this product can successfully be produced in the City area.
4. SACU rate on eggs are 0%

Egg Value Chain

According to the Egg Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, the egg value chain consists of five stages, namely grandparents, parent stock, laying flock, and commercial egg production and the market. The structure of the poultry egg industry value chain is illustrated in Figure 9.

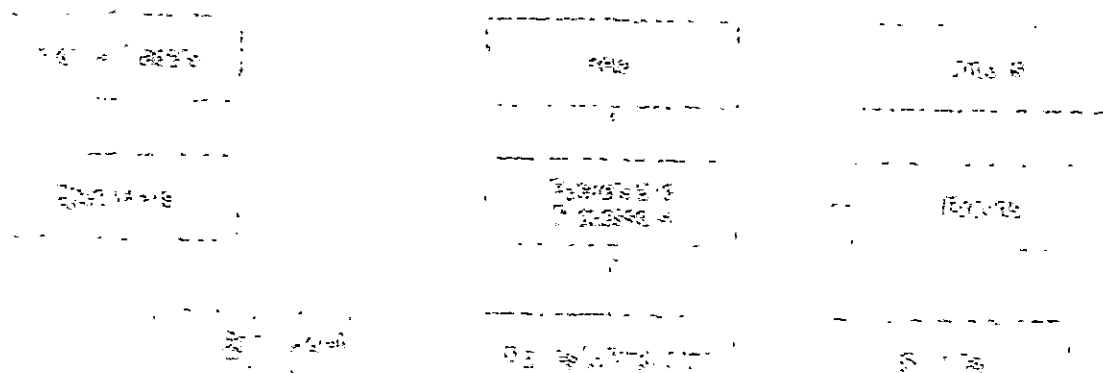


Figure 9: Structure of the Poultry Egg Industry Value Chain

- ◇ Egg production starts with the import of genetic stock (known as grandparents) as day-old chicks.
- ◇ During the second stage, the parents are reared to maturity and produce fertile hatching eggs. The eggs produced by these parents are incubated and the day-old chicks that hatch are called pullets.
- ◇ During the third stage, the pullets are then reared on rearing farms until they are mature at 21 weeks and are ready to lay commercial eggs, at which stage they are called 'point of lay' hens. Some egg producers rear their own point of lay hens as it is a very crucial phase in the life of the hen and the quality of the rearing process has direct bearing on the efficiency with which the hen will eventually produce eggs during her laying phase.
- ◇ The fourth stage involves production of final product, eggs. Eggs are produced in various sizes and they are graded. Commercial layers have a production lifespan of approximately one year after which they are culled and sold as spent hens mainly.
- ◇ The fifth stage is the market. Output of the industry is eggs and spent hens. These are sold by retailers, SMMs, and informal traders that buy eggs from the farms and sell to the consumers. Informal traders play a big role in distributing spent hens to consumers. The distribution chain in the egg industry tends to be short. The greater the distance between producer and consumer, the more complex the marketing channel.

The whole production process, from grandparent stage to the culling of the hen, runs close to three years. In addition to these production processes, there are packing and value addition (liquid egg) functions that are important in the egg value chain. Large companies have integrated or formed subsidiaries to perform these functions while small farms struggle and may even sell their eggs as cracked and ungraded.

Egg Grading and Quality

According to the Egg Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, the quality of the eggs and their stability during storage is largely dependent on their physical structure and chemical composition. Maintaining fresh egg quality from the producer to the consumer is

one of the major problems facing those engaged in the marketing of eggs. Proper attention to production, distribution and point of sale phases are of vital importance in maintaining egg quality.

Agriculture and agri-food regulations define three quality grades that apply to eggs for sale to customers. These are:

- ◇ Grade A - sold at retail markets for household use
- ◇ Grade B - used mostly in bakeries
- ◇ Grade C - sent to egg breakers for processing

Only Grade-A eggs are sized according to the weight of each egg.

- ◇ Jumbo - at least 70 g
- ◇ Extra Large - at least 63 g
- ◇ Large - at least 56 g
- ◇ Medium - at least 49 g
- ◇ Small - at least 42 g
- ◇ Pee Wee - less than 42 g

Eggs are differentiated according to the production systems as follows:

- ◇ Organic free range: These eggs are produced by free-range hens that are fed on grains and pulses that are grown without pesticides, chemical fertilisers or any other genetically engineered products.
- ◇ Omega 3-enriched: Omega 3 fats, which are excellent for brain functioning, the immune and nervous systems, and healthy hearts, are found in oily fish. The hens that lay these eggs are fed salmon oil as part of their diet. Omega 3-enriched eggs are not necessarily free range.
- ◇ Free range: The chickens that lay these eggs are exposed to sunlight and grass pastures. They have room to scratch, flap and bath in the dust. Their diet is not necessarily vegetarian; it could include insects or fishmeal.
- ◇ Barn: These eggs are produced by chickens that live inside but are not kept in cages. Barn eggs are laid by chickens that are fed a vegetarian diet of grains and pulses.
- ◇ Grain-fed: Grain-fed chickens don't eat commercial feed, which can include fish and chicken meal. These eggs are not free range, and not necessarily barn. The chickens may be kept in cages.
- ◇ Commercial: These are the cheapest eggs to buy, and so make up the bulk of the eggs consumed in the country. The chickens are kept inside, in cages. They are fed with meal, which includes commercially farmed grains and pulses and processed fish and/or chicken meal. Electric lights are kept on much of the time to encourage the chickens to lay.

Barriers to Entry

According to the Egg Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, there are several barriers to entry in the South African egg market which may be relevant to Namibia. These include:

- ◇ The availability of laying flock, capital and expertise.
- ◇ Grading, packaging, transportation and bar coding of the eggs hinders formal market access of emerging egg producers to the commercial sector.
- ◇ Accessing finance or working capital to procure stock and cover overhead costs is a barrier.
- ◇ The major supermarket chains require formalized distribution channels with the ability to supply regionally and nationally.
- ◇ Majority of the emerging farmers sell their eggs to hawkers and directly to the consumers. Direct marketing includes the following methods of selling:
 - Sales from farm gate (farm gate)

- Door-to-door sales
- Sales to local retail shops

Barriers to Market

According to the Egg Market Value Chain Report of 2016 by the Department of Agriculture, Forestry and Fishing (DAFF) of South Africa, there are several barriers to market.

Non-Tariff Barriers (NTBTBs)

Non-tariff barriers (NTBTBs) take the form of strict sanitary and phytosanitary measures or adherence to stringent, certification measures such as ISO 9000 certification. These measures span a product's lifecycle: the raw material a product is made from, the manner in which the product is fabricated, the management of production process, labelling standards, and packaging requirements. Developed countries argue that NTBs are applied to eggs to ensure that imported products satisfy environmental, consumer health, consumer safety and social concerns.

The following discussion about NTBs deals with the European Union's (EU) standards. The reason for this approach is that the EU is the largest importer of eggs and it is considered to apply stringent NTBs to imported eggs. Therefore, by implication, if an exporter can satisfy the EU's regulation, his/her product is of the mandated standard to potentially satisfy other countries' NTBs. NTBs on eggs and egg products with special guarantees are listed under Section X of Regulation (EC) No 853/2004 from chapter I to III.

Chapter I: Eggs

- ◇ At the producer's premises, and until sale to the consumer, eggs must be kept clean, dry, and free of extraneous odour, effectively protected from shocks and out of direct sunshine.
- ◇ Eggs must be stored and transported at a temperature, preferably constant, that is best suited to assure optimal conservation of their hygiene properties.
- ◇ Eggs must be delivered to the consumer within a maximum time limit of 21 days of laying.

Chapter II: Egg Products

Requirements for Establishments

Food business operators must ensure that establishments for the manufacture of egg products are constructed, laid out and equipped to ensure separation of the following operations:

- ◇ Washing, drying and disinfecting dirty eggs were carried out.
- ◇ Breaking eggs, collecting their contents, and removing parts of shells and membranes.
- ◇ Operations other than those referred to in the above two points.

Raw Materials for the Manufacture of Egg Products

Food business operators must ensure that raw materials used to manufacture egg products comply with the following requirements:

The shells of eggs used in the manufacture of egg products must be fully developed and contain no breaks.

However, cracked eggs may be used for the manufacture of egg products if the establishment of production or a packing centre delivers them directly to a processing establishment, where they must be broken as soon as possible.

Liquid egg obtained in an establishment approved for that purpose may be used as raw material. Liquid egg must be obtained in accordance with the requirements of points 1, 2, 3, 4 and 7 of the next section (Special Hygiene Requirements for The Manufacture of Egg Products).

Special Hygiene Requirements for the Manufacture of Egg Products

Food business operators must ensure that all operations are carried out in such a way as to avoid any contamination during production, handling and storage of egg products, by ensuring compliance with the following requirements:

- ◇ Eggs must not be broken unless they are clean and dry.
- ◇ Eggs must be broken in a manner that minimizes contamination, in particular by ensuring adequate separation from other operations. Cracked eggs must be processed as soon as possible.
- ◇ Eggs other than those of hens, turkeys or guinea fowl must be handled and processed separately. All equipment must be cleaned and disinfected before processing of hens', turkeys' and guinea fowls' eggs is resumed.
- ◇ Egg contents may not be obtained by the centrifuging or crushing of eggs, nor may centrifuge be used to obtain the remains of egg whites from empty shells for human consumption.
- ◇ After breaking, each particle of the egg product must undergo processing as quickly as possible to eliminate microbiological hazards or to reduce them to an acceptable level. A batch that has been insufficiently processed may immediately undergo processing again in the same establishment, if this processing renders it fit for human consumption. When a batch is found to be unfit for human consumption, it must be denatured to ensure that it is not used for human consumption.
- ◇ Processing is not required for egg white intended for the manufacture of dried or crystallized albumin destined subsequently to undergo heat treatment.
- ◇ If processing is not carried out immediately after breaking, liquid egg must be stored either frozen or at a temperature of not more than 4°C. The storage period before processing at 4°C must not exceed 48 hours. However, these requirements do not apply to products to be de-sugared, if the de-sugaring process is performed as soon as possible.
- ◇ Products that have not been stabilized so as to be kept at room temperature must be cooled to not more than 4°C. Products for freezing must be frozen immediately after processing.

Analytical Specifications

- ◇ The concentration of 3-OH-butyric acid must not exceed 10 mg/kg in the dry matter of the unmodified egg product.
- ◇ The lactic acid content of raw material used to manufacture egg products must not exceed 1g/kg of dry matter. However, for fermented products, this value must be the one recorded before the fermentation process.
- ◇ The quantity of eggshell remains, egg membranes and any other particles in the processed egg product must not exceed 100 mg/kg of egg product.

Labelling and Identification Marking

- ◇ In addition to the general requirements for identification marking, consignments of egg products, destined not for retail but for use as an ingredient in the manufacture of another product must have a label giving the temperature at which the egg products must be maintained and the period during which conservation may thus be assured.
- ◇ In the case of liquid eggs, the label referred to above must also bear the words: 'non-pasteurized egg products, to be treated at place of destination' and indicate the date and hour of breaking.

Chapter III: Special Guarantees

- ◇ In the case of eggs, packing centres shall provide⁴⁰² a guarantee that consignments originate from flocks that have been subjected to a microbiological test with negative results in accordance with legislation.
- ◇ The test provided for in the first subparagraph, need not be carried out for consignments intended for the manufacture of processed products by a process that guarantees the elimination of salmonella.
- ◇ A certificate stating that the tests referred to in the first subparagraph have been carried out with negative results, or that the eggs are destined to be used in the manner referred to in the second subparagraph, must accompany consignments.

4.1.8. Fresh Produce Business Hub (FPBH)

If agricultural produce can be cultivated in a significant quantity, then the most efficient method to beneficiate this produce is at the Fresh Produce Hub, a project of the Ministry of Agriculture, Water and Forestry (MAWF), to be managed by the Agro-Marketing and Trade Agency (AMTA).

The Fresh Produce Business Hub plans are at an advanced stage and have found that:

- ◇ Namibia imports over 70% of fresh produce from South Africa.
- ◇ That the Green Scheme introduces more than 30,000 ha irrigated land to the national production side.
- ◇ ~~Namibian Producers should have a proximity advantage with this development compared to its South African counterparts.~~
- ◇ There is a lack of a National market scheme.
- ◇ Namibia does have suitable land for irrigation and extensive farming.
- ◇ A wholesale and distribution network is already in existence in Namibia.
- ◇ Retail chains and consumer outlets are in existence.
- ◇ The city has critical consumer mass.
- ◇ The components outstanding within the fresh produce value chain are:
 - Cold storage facilities to maintain the lifespan of your fresh produce,
 - Ripening facilities,
 - Trading platform with appointed agents occupying spaces for smooth trading of fresh produce from the farmers to respective clients e.g. retailers, consumers, catering companies, vendors etc.,
 - Trading system: this is a system designed to create trading transparency to protect the farmer, the consumer and the agents,
 - Training to foster continuous knowledge improvement in terms of compliance, certification in line with international food safety and agricultural standards like *HACCP, GAP, ISO9001:2008 etc.,
 - Value addition facilities like packaging, sorting, grading, processing etc.,
 - Informal trading facilities e.g. small scale traders,
 - Fleet systems, transportation of fresh produce via collection points from the farmer to the Hubs and to the markets. AMTA has chiller trucks to enable freshness of the produce during transportation,
 - Quality and standards, certifications, compliance norms, awareness, facilitation, coordination etc.
 - Implementation of Good Agricultural Practices (GAP) by the majority of horticultural farmers in Namibia.

The WFPBH development is illustrated in Figure 10 and consists out of a central hub administration building, market hall with trading floor with cold room storage facilities, workshop and pump house, truck port and truck wash, central value addition, sites/erven for future industries – multipurpose, modular informal community market, public transport node and laboratory.

The timeline for completion of this project will depend on the availability of funds, probably over the next 5 years. The CoW can support the WFPBH, according to earlier traffic impact studies; the upgrading of Monte Christo

-403-

Street would be a necessity to accommodate increased truck traffic to the Hub. City of Windhoek will need to fund and upgrade the street.

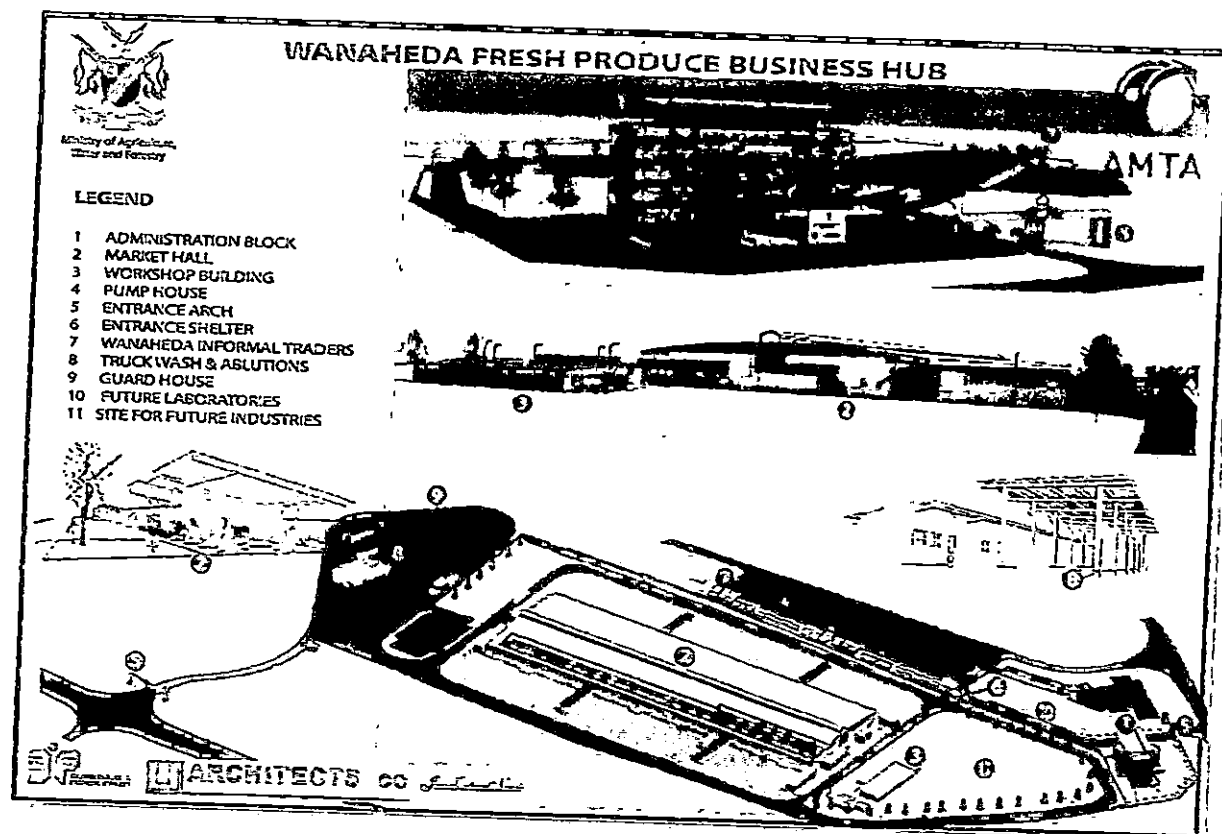


Figure 10: Windhoek Fresh Produce Business Hub Illustration

Source: Fresh Produce Hub Programme

4.1.9. Agriculture and Agro-Processing Programmes and Projects

Table 4-3 provides a summary of the agriculture and agro-processing programmes and projects.

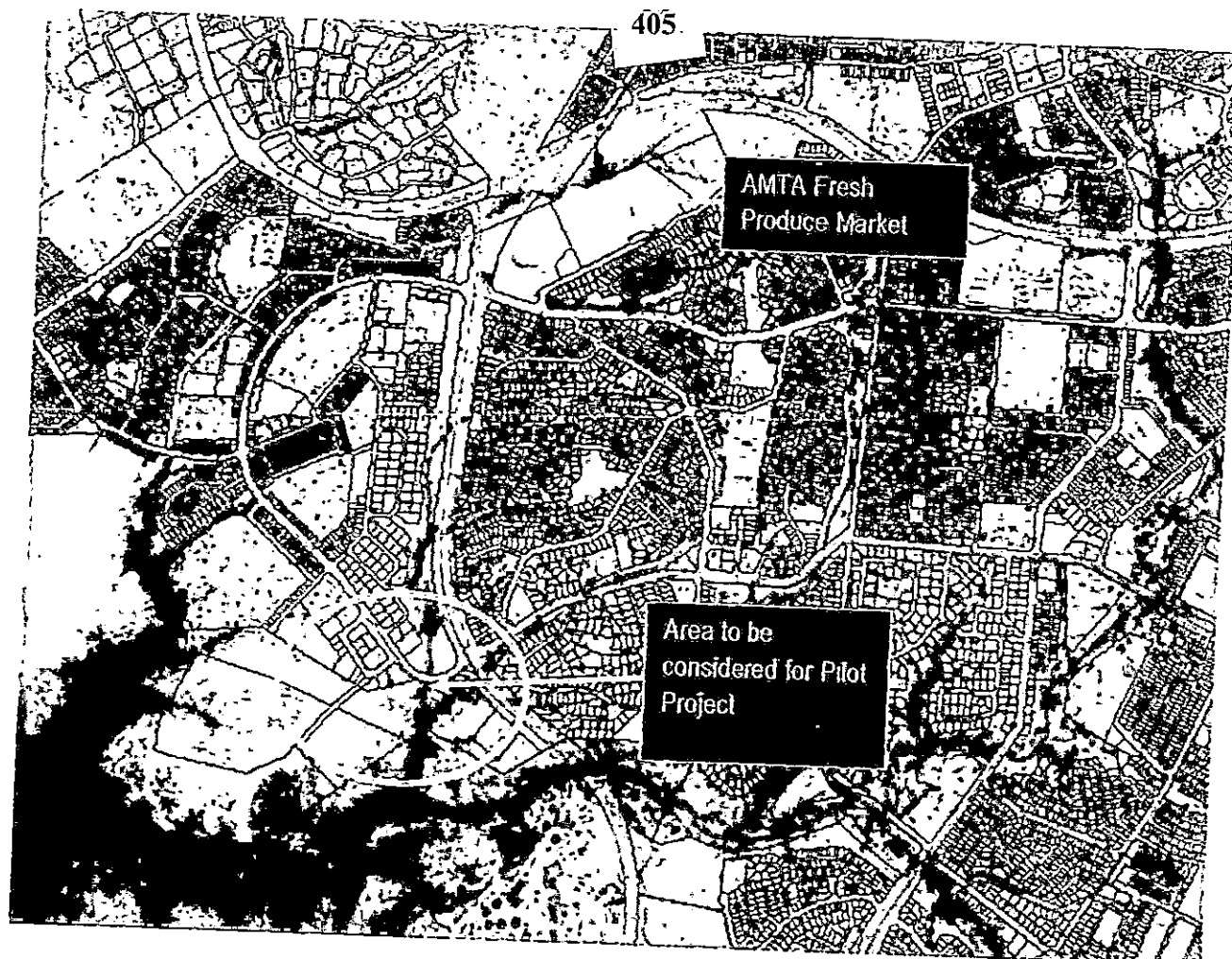
Table 4-3: Agriculture and Agro-Processing Programmes and Projects

Programmes	Projects
Increase Water Recovery	<ul style="list-style-type: none"> • Increase non-potable water recovery for agricultural use • Underground water (Boreholes) : Investigate underground water availability and sustainable yield within the extended boundaries of the CoW
Access to Farmland	<ul style="list-style-type: none"> • Review farmland access and availability in Windhoek • Identify municipal farmland close to existing non-potable water infrastructure for aquaponics and hydroponic farming
Increase Water Supply to Selected Farmland	<ul style="list-style-type: none"> • Water pipeline for potable and/or non-potable water between water plant and cluster of farms
Increase Agriculture Stakeholder	<ul style="list-style-type: none"> • Schedule agriculture and agro-processing sessions as a regular feature in the Economic Development and Investment Forum (see section 4.6.9) • Partner with agriculture and agro-processing stakeholders such as existing commercial farmers, academic institutions to improve agricultural production (genetics, technology, methods, etc.) within the City
Increase Agricultural Produce (crops, organic and livestock)	<ul style="list-style-type: none"> • Conduct an Agriculture Cultivation and Agro-Processing Strategy study to identify suitable soil, best crops, freshwater fish and livestock options for the City. • Support aquaponics and hydroponic farmers: <ul style="list-style-type: none"> ◦ Rent available agricultural land to aquaponics and hydroponic farmers ◦ Supply these farms with non-potable water infrastructure • Increase livestock production <ul style="list-style-type: none"> ◦ Rent available agricultural land to livestock farmers ◦ Ensure that these farms have the required water rights ◦ Supply these farms with water infrastructure (e.g. boreholes) to ensure water suitable for livestock production • Support organic agriculture produce production • Support household agriculture/roof gardening, etc.
Value Chain Development of Agricultural Produce	<ul style="list-style-type: none"> • Develop Agricultural Produce Value Chains <ul style="list-style-type: none"> ◦ Conduct market value-chain studies (local and export supply and demand studies) for all selected crops ◦ Identify potential agro-processing investment opportunities ◦ Identify potential agro-processing investors
Agro-Processing	<ul style="list-style-type: none"> • Support the Fresh Produce Hub (AMTA)

4.1.10. Spatial Analysis

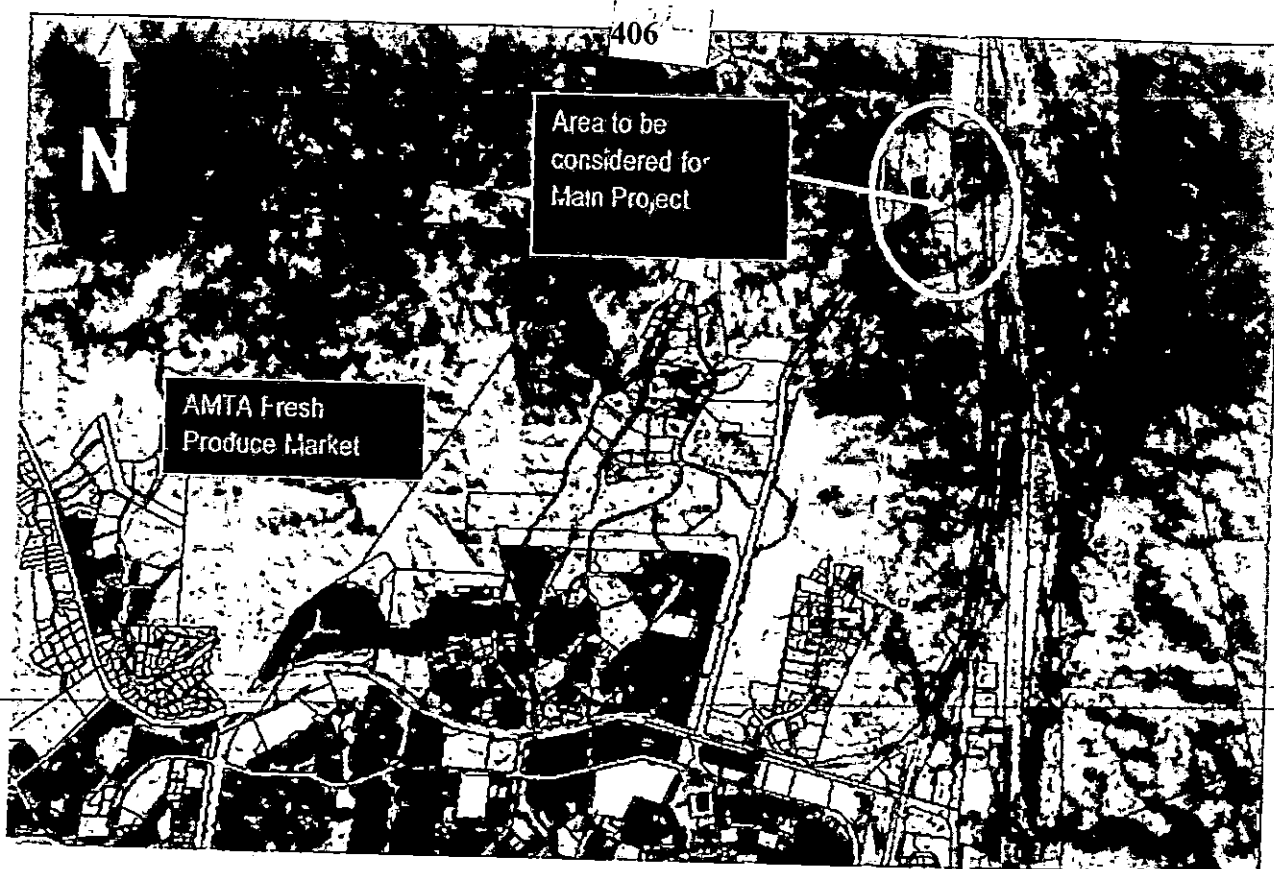
Farmland that is suitable for water-efficient agricultural production activities such as hydroponics and aquaponics is not readily available in the close vicinity of the City. However, as mentioned above, the MAWF through AMTA is currently busy with the development of the Fresh Produce Business Hub on land located about 1.5km to the north of the Goreangab Dam and the water reclamation works. Given the fact that there are no significant agricultural production activities currently taking place in the City, it is regarded as prudent to start this initiative in conjunction with AMTA as the facilities are already being developed. As a result, it is recommended that the CoW earmark land that can be allocated on an affordable lease basis to MSME producers to start with small-scale horticultural activities as found suitable in the to-be-developed agriculture cultivation and agro-processing strategy.

Having considered the location requirements for such agricultural land, it would be ideal that a MSME pilot project be located in an area next to the Goreangab dam. This area is about 1.5km from the Fresh Produce Business Hub, has good road access, can easily be provided with water, sewerage and electricity, and is currently vacant. Map 4 shows the position of the Fresh Produce Business Hub that is under construction and the proposed land area to be considered for the pilot project.



Map 4: Proposed location of the Pilot Project for Agricultural Production

Once the pilot project is implemented successfully, one may expect increased interest and demand for land where larger ventures can be established. In considering suitable land for further expansion, the same locality considerations are valid, and it must still be sited close to labour, water and markets or the Fresh Produce Business Hub. It is recommended that the area to the east of the B1 main road to Okahandja, just north of the existing Ujams Water Treatment Facility, be earmarked for such development. The quality of the purified effluent (Special Standards) from this facility is adequate and previous activity in the form of an instant-lawn growing facility was located in this area before. Given the small space requirements for these types of agricultural production, this is a substantial portion of land that is really suited for the purpose. It is located about 8 km from the Fresh Produce Market along a very good road and easy access. Map 5 provides an indication of the location of this portion of land.



Map 5: Proposed Location of land for further Agricultural Development

4.1.11. High-Level Bulk Infrastructure Assessment

4.1.11.1. Transportation Infrastructure Assessment

The area earmarked for the MSME pilot project is situated just to the east of the Otjomuise Road Arterial. Access can be taken either from Eveline Street, or a dedicated direct access from Otjomuise Road. It is envisaged that the traffic impact will be low and access be taken from Eveline Street.

The area earmarked for the Main Agricultural Project is situated to the east of the B1 and the northern outbound railway line. Access can be taken via then current gravel road running east and parallel to the mentioned railway line with access option from Robert Mugabe, Northern Industrial Area and mainly from the B1 at the Brakwater-Elisenheim interchange..

4.1.11.2. Water and Sanitation Infrastructure Assessment

The area identified for the agricultural project at Goreangab dam is located within the Katlo Reservoir Pressure Zone. Both the *City of Windhoek – Revisions to the Windhoek Bulk Water Masterplan (July 2008)*, as well as a bulk services study in this pressure zone, that was conducted by Burmeister & Partners, confirms that this pressure zone is stable and has capacity available in terms of water supply and bulk storage, subject to the final water demands and exact location. (Burmeister & Partners (Pty) Ltd, February 2013)

Similarly this area is located in close proximity to existing semi-purified reticulation infrastructure, and a connection to the available rising mains should be fairly straightforward to allow access to this water resource as well.

The second locality proposed to the east of the B1 main road to Okahandja, just north of the existing Ujams Wastewater Treatment Facility does not have access to the Municipal water reticulation and distribution network. However, it is in very close proximity to the Ujams Wastewater treatment works, and the high quality purified

effluent from this facility can be used as the water resource. Further treatment on the purified effluent can be considered, depending on the type of crop or produce and irrigation methods considered, but currently the purified effluent from this facility is not re-used. If required potable water connection can be obtained from the NamWater bulk supply pipelines which borders this area.

In terms of sewage production, very low volumes are expected, as the processing of produce will not be done at the facilities. Only a small number of operational and administrative staff will be working the facilities daily, and the sewage production is expected to be easily accommodated within the existing gravity sewage networks located in close proximity to both localities.

Underground water aquifers with good water quality exists within the extended boundaries of the CoW and can be utilized for modern water efficient horticultural farming techniques, however capacity and sustainable yield should be assessed holistically on an aquifer wide basis to avoid overexploitation of this valuable resource.

4.1.11.3. Electricity Infrastructure Assessment

The area identified for the project is located directly to the west of the Goreangab Load Centre. Goreangab LC has a firm capacity of 40MVA (60MVA Installed capacity). Current demand is 9.1MVA and the 20 year forecasted demands predicts a 58% and 40% spare capacity for minimum and maximum growths respectively. Hence, sufficient electricity capacity exists to support the pilot project.

With regards to the AMTA FPBH: The closest provision is already in place to build the Windhoek FPBH Distribution Station at the Windhoek FPBH. The Distribution Station will be fed from the Goreangab Load Centre (assessment as per Pilot Project).

With regards to the area earmarked for the project, the closest load centre is the Elisenheim Load Centre which has a firm capacity of 40MVA (60MVA Installed capacity). Current demand is 7.69MVA and the 20 year forecasted demands predicts an 80% and 72% spare capacity for minimum and maximum growths respectively. There is however talks of a Brakwater Load Centre which needs to be confirmed.

4.1.11.4. Information & Communications Technology Assessment

The telecommunication distribution network throughout the city is easily and effectively accessible. This is true for high capacity fibre-optic networks as well as cellular- and data networks. The roll-out of 5G technology in the near future will add unprecedented advantages in the communication field.

4.1.12. Strategic Intervention Outcome ⁴⁰⁸

Table 4-4 illustrates the outcomes of the agriculture and agro-processing strategic interventions, programmes and projects.

Table 4-4: Strategic Intervention Outcome for Agriculture and Agro-Processing

Indicator	Rating	Comment
Food Security		More food is produced, which in turn increases food security.
Agricultural GVA		Agricultural GVA increases.
Agricultural Sector Importance to CoW		The agricultural sector in Khomas Region contributes more to the Khomas Region GVA.
Agricultural GVA Growth		Agricultural project will contribute to national agricultural growth.
Fresh Water Availability		New and improved agricultural techniques ensure that less strain is placed on freshwater usage.
Reclaimed Water		Additional non-potable water is produced for irrigation.
Agricultural Land		Agricultural land is more optimally used in the City.
Availability of Agricultural Produce		Additional agricultural produce is available for agro-processing.
Manufacturing GVA		Manufacturing GVA in Khomas Region will increase due to the availability of additional agricultural produce and increased agro-processing.
Manufacturing Sector Importance to CoW		The manufacturing sector in Khomas Region will contribute more to total GVA in Khomas Region.
Manufacturing GVA Growth		Agro-processing projects will contribute to national manufacturing growth.

Note! Colour coding is used to indicate the anticipated status of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability, after all proposed interventions had been implemented. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.2. Strategic Intervention: Transport and Logistics

4.2.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to improve connectivity by improving its local and bulk transport and logistics networks.

4.2.2. Factors Influencing Transport and Logistics Development

Figure 11 and Table 4-5 illustrate several factors that influence the market attractiveness for transport and logistics in Windhoek.

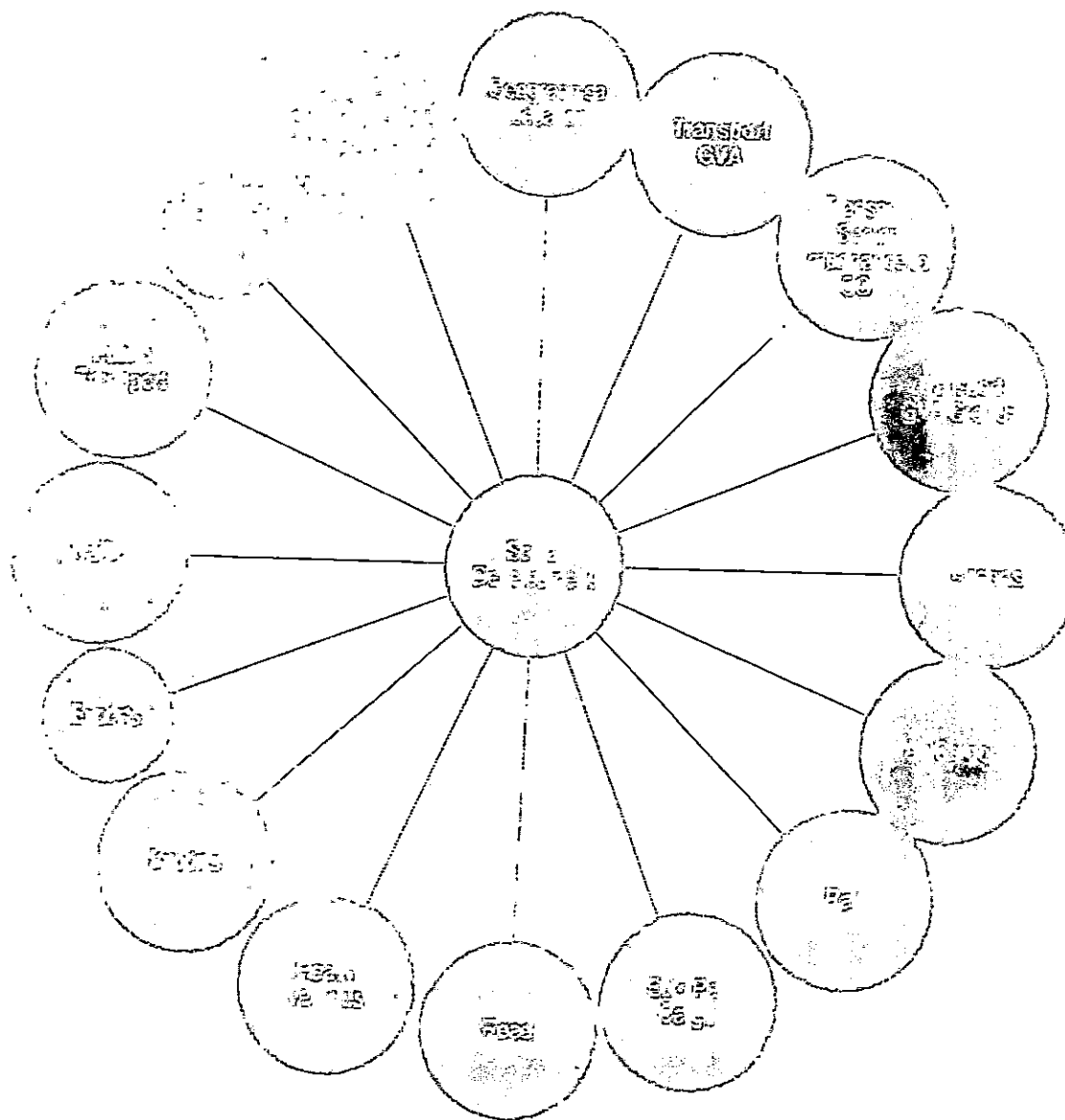


Figure 11: Factors Influencing Transport and Logistics Development

Table 4-5: Factors Influencing Transport and Logistics Development

Indicator	Rating	Comment
Geographical Location		Windhoek is centrally located in Namibia
Transport GVA		Transport GVA in Khomas Region was about N\$1,174.70 million in 2011. Khomas Region contributed an estimated 26.46% of the national transport GVA.
Transport Sector Importance to CoW		The transport sector in Khomas Region contributed about 4.33% of total GVA in Khomas Region in 2011.
Transport GVA Growth		The national transport sector GVA growth was about 6.63% p.a. between 2011 and 2016.
Airports		Windhoek has two main airports, namely Hosea Kutako International Airport and Eros Airport.
Air Cargo		Eros Airport is predominantly used by small charter planes.
Rail		Windhoek is located at the core of TransNamib's rail network.
Bulk Rail Cargo		Transport of freight by rail between Namibia and South Africa is not viable. An agreement had been signed between Botswana and Namibia for the development of the Trans-Kalahari railway, which is estimated to cost US\$9.5 billion. The line will link Walvis Bay through Windhoek and Gaborone to Johannesburg. However, the timeline for this intervention is not clear yet. A bilateral Memorandum of Agreement was signed in 2014 between the Namibian and Botswana Governments for the development of the Trans-Kalahari Railway. At the time, the project was scheduled for completion by 2019, hence a construction period of 5 years. However, five years later the project has not yet kicked off. Although the project remains in limbo, Botswana Railways did indicate that it is still committed to the development of the Trans-Kalahari Railway.
Road		Several major roads pass through or near Windhoek, including the B1 (South Africa and Angola), B2, B6 (Botswana), B8 (Zambia). These form the backbone for the cross-border corridors such as Trans-Cunene Corridor, Trans-Oranje Corridor, Trans-Kalahari Corridor, and has easy access to the Walvis Bay-Ndola-Lubumbashi Development Corridor.
Heavy Vehicles		Heavy vehicles make up a significant proportion of all traffic on major highways. The more common routes include Rehoboth – Windhoek 12% of all traffic (616 trucks per day out of 5,184 vehicles total), Windhoek – Brakwater 9% (1,415 / 15,378) Windhoek – Hosea Kutako Airport 10% (322 / 3,273) and Windhoek – Walvis Bay 12% (10 / 84)
Imports		Between 2012 and 2017, Namibia was a net importer, with the exception of 2017. About 55% of all imports came from South Africa. Due to the lack of train services in South Africa, most of this is transported using trucks.
Exports		South Africa was the predominant export market for Namibia as it contributed about 21.79% to the exports of Namibia in 2017. Other countries that imported from Namibia include Botswana, Switzerland and China
Public Transport		Windhoek has a reasonably good bus service throughout the day, in half-hour intervals. In addition, local metered taxis cover most of the outskirts of Windhoek.
Traffic		Windhoek does not have significant traffic congestion issues, but unsynchronised traffic lights do add to travel time.
Parking		Windhoek, especially in its city centre, lacks parking.
Non-Motorised Transport		Windhoek lacks non-motorised transport system.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.2.3. Introduction

Logistic infrastructure facilitates the movement of goods and people. Good road, rail, air and other logistics infrastructure is critical for manufacturing, trade and tourism, while infrastructure support systems are required to integrated and optimise the safety, security, speed and frequency of the services offered.

4.2.4. Windhoek's Comparative Advantage in Transport and Logistics

Windhoek's central position in Namibia and its existing logistic infrastructure linkages with all major centres in Namibia gives it a good comparative advantage compared to the rest of Namibia.

4.2.5. Current and Future Transport and Logistics Infrastructure

Windhoek is an important link in the national road network. Several important road links are currently being upgraded, including Windhoek – Okahandja, Rehoboth – Windhoek and Windhoek – Hosea Kutako.

TransNamib promotes developmental initiatives to carry maximum freight task movement on various corridors and strategic locations in the SADC region, especially in supporting land-locked countries, and provision of linkages to harbours for countries such as Botswana, Zambia and Zimbabwe. For example, a memorandum of agreement had been signed between Botswana and Namibia for the development of the Trans-Kalahari railway, established in 2000. The Trans Kalahari Corridor (TKC) is a road network spanning approximately 1900 kilometres across the territories of Botswana, Namibia and South Africa. It starts in the Gauteng Province in South Africa and continues through Rustenburg and Zeerust in the North-West Province, through Lobatse and Kanye in Botswana, the Mamuno and Trans Kalahari Border Posts, through Gobabis, Windhoek and Okahandja in Namibia and right through to the Port of Walvis Bay. (TRANS KALAHARI CORRIDOR SECRETARIAT, 2019)

In addition, Hosea Kutako International Airport is a major transport hub in the SADC region

There are storage facilities available at Hosea Kutako International Airport, including cold storage, strong room, live animal storage, human remains, refrigerated container, dangerous goods centre, radioactive centre, mail centre, and valuable goods safe. (Air Namibia, 2019)

Eros Airport is located significantly closer to Windhoek CBD compared to Hosea Kutako International Airport. Eros Airport acts as a secondary hub, while scenic tour operators and sky taxis use the airport as their main base.

4.2.6. Logistics Support Structures

To unlock Windhoek's full potential to become a major logistics hub in the SADC region, the relevant **logistics support structures** must be in place to support the sector. These include logistics hubs such as truck stops, rail yards, air cargo and piggyback infrastructure, rail support services such as rolling stock maintenance yard, and marshalling yards and warehousing of which most exist but efficiency should be optimised.

4.2.7. Local Transport System

Windhoek has a public transport system that appears to be supporting local business. Some 76% of manufacturing businesses, 74% of tourism-orientated businesses and 65% of trade businesses indicated that they believe that their locations near public bus routes are an advantage to their businesses.

Windhoek will experience an increase in demand for local public transport. Households spent about 7% of household consumption on transport and communication in 2016. Using average household consumption (N\$119 065 in 2016), population (between 415,074 and 416,997 in Windhoek in 2018), and household size data (3.62 in 2018), it can be calculated that just over N\$0.95 billion was spent by households in Windhoek on transport and communication in 2018. Using population predictions, the household consumption of transport and communication in Windhoek will increase to about N\$1.45 billion in 2030, assuming that household consumption remains constant.

The increased demand for transportation between 2019 and 2030 provides CoW with the opportunity to expand on its public transport system, while alleviating any potential future congestion by capturing a larger market share of the local transport market.

4.2.8. Non-Motorised transport

Connectivity is one of the most crucial elements in local economic development. Yet large segments of the population cannot afford to make use of public transport systems. The implementation of the **recently developed CoW Non-Motorised Transport Strategy** is essential to ensure that the marginalised have access to economic

Non-motorised transport provides urban mobility which offers people the opportunity to access opportunities in an affordable manner. The World Bank Study, titled *The significance of non-motorised transport for developing countries*, it was found that non-motorised transport had a significant impact on economic growth, reduction of poverty, and quality of life in urban areas. (World Bank, 2000)

Two of the most common non-motorised transport systems are walking lanes for pedestrians and cycling paths for cyclists. In many developed countries, the most common practise is to develop these two systems together. Pedestrian and cycling lanes are developed next to each other or in some cases together with just a line dividing the two.

4.2.9. Transport and Logistics Programmes and Projects

Table 4-6 provides a summary of the transport and logistics programmes and projects.

Table 4-6: Transport and Logistics Programmes and Projects

Programmes	Projects
Logistics Support Structures	<ul style="list-style-type: none"> Upgrade Logistics Hub such as truck stop, rail yards, air cargo and piggyback infrastructure Upgrade Rail Support Services such as rolling stock maintenance yard and marshalling yards Review capacities of storage facilities (warehouses, cold storage etc.) as logistical support structures to assess sufficiency to accommodate logistics growth trends.
Local Public Transport	<ul style="list-style-type: none"> Review of Transport Plan (together with Spatial Development Framework) <ul style="list-style-type: none"> Transport node developments Transport route developments Airport-tourist hub bus route Licensing of private sector operators in tourist areas
Implement Non-Motorised Transport Plan	<ul style="list-style-type: none"> Implement Non-Motorised Transport Strategy <ul style="list-style-type: none"> Pedestrian walkways Cycling lanes

4.2.10. Spatial Analysis

The Agri Logistics Hub, at least for the foreseeable future and certainly for the duration of the plan period, should be combined with the Fresh Produce Market and Hub currently under construction. The current locality of the Fresh Produce market was shown in maps 4 and 5 above.

With respect to public transport and non-motorised transport, the City suffers heavily under "spatial injustice" in the sense that planning more or less continued in the same vein as before independence, with the poor and marginalised settled in both formal townships and informal settlements on the fringes of the City. They are the ones furthest from employment opportunities and are spending substantial portions of their incomes to get to and from work. In addition, it takes between 2 and 4 hours per day for many workers to travel to and from work.

It is therefore imperative that the guidelines for land-use planning in the city be reconsidered. It must specifically address the adequate provision of business land in large enough clusters and sufficient in area to enable such satellite business areas to be viable and able to reach the required thresholds to foster forward and backward integration and interdependence. These should preferably not be in the configuration of a mall, but rather in the form of an "open street mall" with mixed land use, mixed housing and mixed communities putting life into such business centres. Non-motorised transport facilities should form part of any new development to enable people to move without vehicles in safe spaces. The city should also reconsider development control provisions such as parking, bulk restrictions and free residential bulk to encourage the development of such centres.

In addition, the city should consider a more aggressive densification and infill policy whereby unused or under-used land be earmarked for re-purposing, up-zoning or densification to bring people closer to the main employment

hubs of the city.

413

4.2.11. High-Level Bulk Infrastructure Assessment

4.2.11.1. Transportation Infrastructure Assessment

Developments in Windhoek are currently exceeding Council's ability to keep up with the required expansion of its planned transportation network as per the implementation programme recommended by the Sustainable Urban Transport Master Plan.

4.2.11.2. Electricity Infrastructure Assessment

The Electrical distribution and transmission network has the capacity to supply all areas of Windhoek, with the exception of areas surrounding the Eros Load Centre which will reach capacity soon.

4.2.11.3. Information & Communications Technology Assessment

The telecommunication distribution network throughout the city is easily and effectively accessible. This is true for high capacity fibre-optic networks as well as cellular- and data networks. The roll-out of 5G technology in the near future will add unprecedented advantages in the communication field.

4.2.12. Strategic Intervention Outcomes

415

Table 4-7 illustrates the outcomes of the transport and logistics strategic interventions, programmes and projects.

Table 4-7: Strategic Intervention Outcome for Transport and Logistics

Indicator	Rating	Comment
Geographical Location		No Change
Transport GVA		Transport GVA in Khomas Region may increase
Transport Sector Importance to CoW		The transport sector in Khomas Region will become an important sector in Khomas.
Transport GVA Growth		Due to increased transportation and logistics activity, the sector will continue to grow.
Airports		No Change
Air Cargo		No Change
Rail		Windhoek is located at the core of TransNamib's rail network. This can be leveraged to increase Windhoek's share to provide additional transport support services.
Bulk Rail Cargo		Windhoek could become a major player in providing bulk rail freight to neighbouring countries. This may be unlocked by the agreement signed between Botswana and Namibia for the development of the Trans-Kalahari railway, which is estimated to cost US\$9.5 billion. It must be noted that implementation of this project in Windhoek is still uncertain due to topographical constraints towards the west of Windhoek.
Road		No Change
Heavy Vehicles		Less heavy vehicles use major highways, decreasing damage to road infrastructure.
Imports		Namibia and Windhoek will become a hub through which imported goods destined for neighbouring countries can be moved.
Exports		Namibia and Windhoek will become a hub through which export goods destined for neighbouring countries can be moved. This may assist manufacturers in Windhoek to export additional products to these countries.
Public Transport		CoW will improve its public transport system's efficiency to connect labour with areas that provide job and economic opportunities. The public transport system will be expanded to increasingly more areas, including the airport to ensure additional transportation options to tourist.
Traffic		No Change
Parking		Since more people utilise public and non-motorised transport, there will a reduced need for parking in the Windhoek, especially in the city centre.
Non-Motorised Transport		By implementing the reviewed non-motorised transport plan, more people will have access to economic opportunities.

Note! Colour coding is used to indicate the anticipated status of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability, after all proposed interventions had been implemented. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.3. Strategic Intervention: Tourism

4.3.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to improve on its tourism product offering to encourage tourists to extend their stay within the City.

4.3.2. Factors that Influence Tourism

Figure 12 and Table 4-8 illustrate several factors that influence the market attractiveness for tourism in CoW.

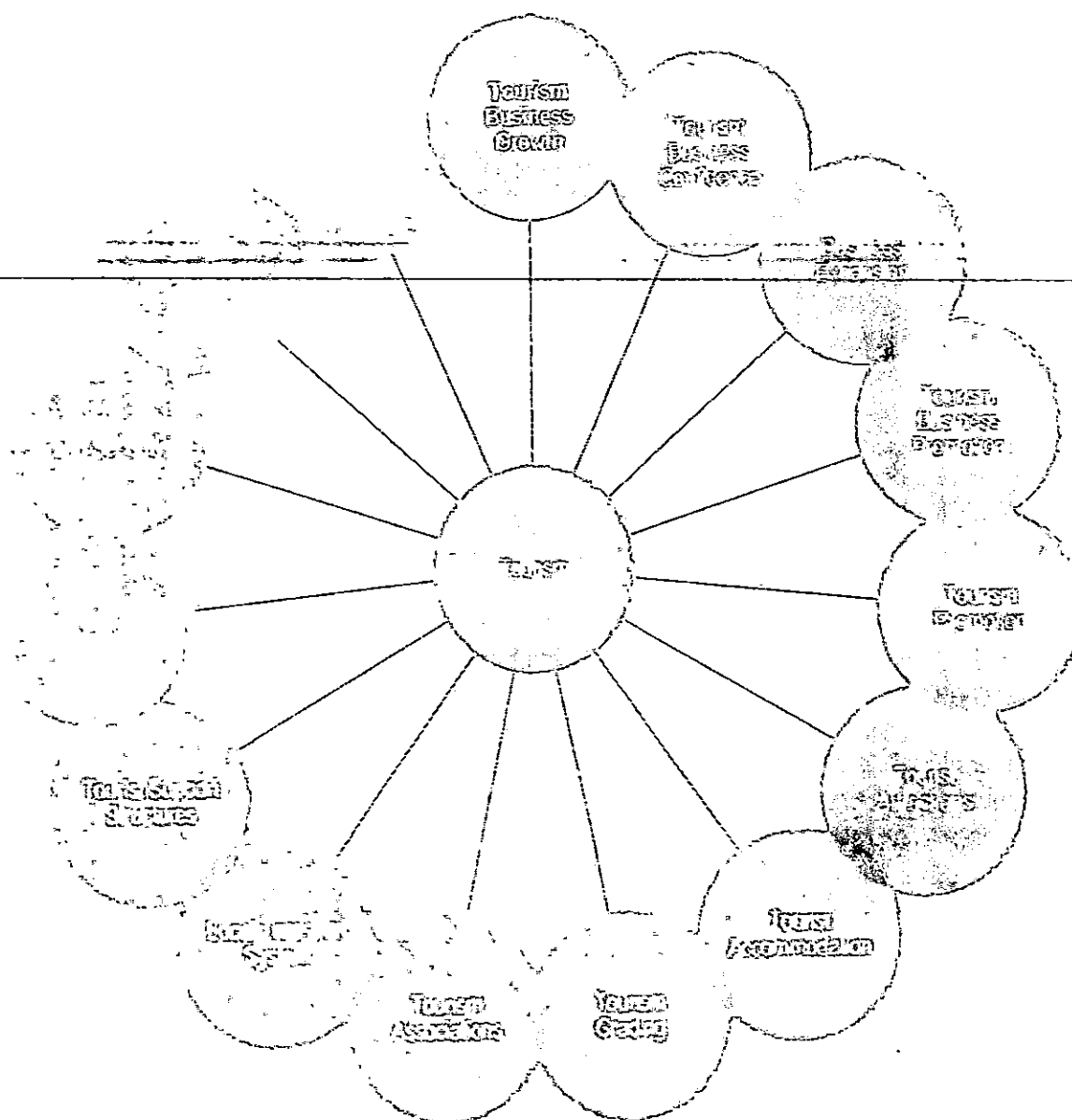


Figure 12: Factors Influencing Tourism

Table 4-8: Factors influencing Tourism

417

Indicator	Rating	Comment
Tourism Business Growth		Some 41% of tourism businesses in this sector indicated that they had experienced an increase in turnover during the previous three years, while 38% indicated a decline in turnover. Other indicators include: employment (24% vs. 18%), market share (28% vs. 22%), and physical space (14% vs. 6%).
Tourism Business Confidence		Some 71% of businesses in the sector indicated that they expect growth in turnover in the next 12 months. Other indicators included: employment (52% vs. 6%), market share (54% vs. 6%), and physical space (34% vs. 3%).
Business Expansion		Some 40% of tourism-orientated businesses are considering expanding their businesses, of which 45% is considering opening a new branch and 35% is considering expanding their current product range.
Tourism Business Promotion		Only 21% of tourism-orientated businesses have websites.
Tourism Promotion		Some 68% of tourism-oriented businesses indicated that Windhoek is well-promoted to foreign tourists, yet the official website has significant technical issues.
Tourist Attractions		Windhoek has a cluster of high potential tourist attractions in and around the city centre that is underdeveloped. In addition, the top four tourists' attractions indicated by tourist-oriented business in Windhoek were Heroes Acres (19%), Craft Market (14%), Joe's Beerhouse (13%) and National Art Gallery (10%). The Rivenvalk development may also provide a boost to Windhoek's range of tourist attractions.
Tourist Accommodation		Windhoek has a well-developed tourist accommodation industry with various accommodation options.
Tourism Grading		Only 15% of tourist businesses were graded. Most were graded as 2 stars with only 12% being 5-star.
Tourism Associations		Only 18% of tourist businesses were registered with an official tourism association.
Local Transport System		Windhoek has a reasonably good bus service throughout the day, in half-hour intervals. In addition, local metered taxis cover most of the outskirts of CoW.
Tourist Support Structures		Windhoek has a strong tourism system including support systems, enabling environment and soft infrastructure.
Ports		Windhoek has two main airports, namely Hosea Kutako International Airport and Eros Airport. Most non-African foreign tourists enter Namibia through these ports.
Tourism Safety and Security		CoW has a dedicated policing unit that focusses only on the safety and security of tourists.
Tourism Information Centre		The tourism information centre in Windhoek is hidden away in a corner in Post Mall Street.
Tourism Signage		Tourism signage is reasonably good, but the signage for the tourism information centre in Windhoek is in the middle of a tree.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.3.3. Introduction

The Municipal Council of Windhoek (hereafter referred to as "the City of Windhoek", ("COW") aims to take up a more active role in the development of a sustainable tourism sector in Windhoek. The City need to assess the competitiveness of Windhoek as a destination and to develop initiatives that will improve the City's competitive position to attract more tourists and improve visitor satisfaction.

The City of Windhoek need to identify key initiatives and objectives that should be implemented to better position the Windhoek as a destination that attracts more tourists and encourages them to extend their stay in the City. Windhoek is in competition with other destinations in Namibia for tourists and must identify and develop products and services and infrastructure required to facilitate local tourism.

CoW has several advantages that it can leverage to develop a tourism product offering that is appealing to both

domestic and international tourists. CoW already has a good tourism system, but some elements are underdeveloped, most notably tourist attractions. This is a significant barrier to tourism development within the area.

Currently, Windhoek acts as a transit City for tourists. Most international tourists will enter Namibia through Hosea Kutako International Airport, rent a vehicle and go on safari with limited time spent in Windhoek. The CoW Tourism Strategy is to address this concern.

4.3.4. Tourism System

419

Tourism should be viewed as a holistic system that cuts across various economic sectors and it further influences and is influenced by the economy, community and the environment. The tourism industry is therefore more than the group of products and services provided to the tourist. Tourism should be viewed as a holistic system that acts in an integrated way to function properly, as illustrated in Figure 13.

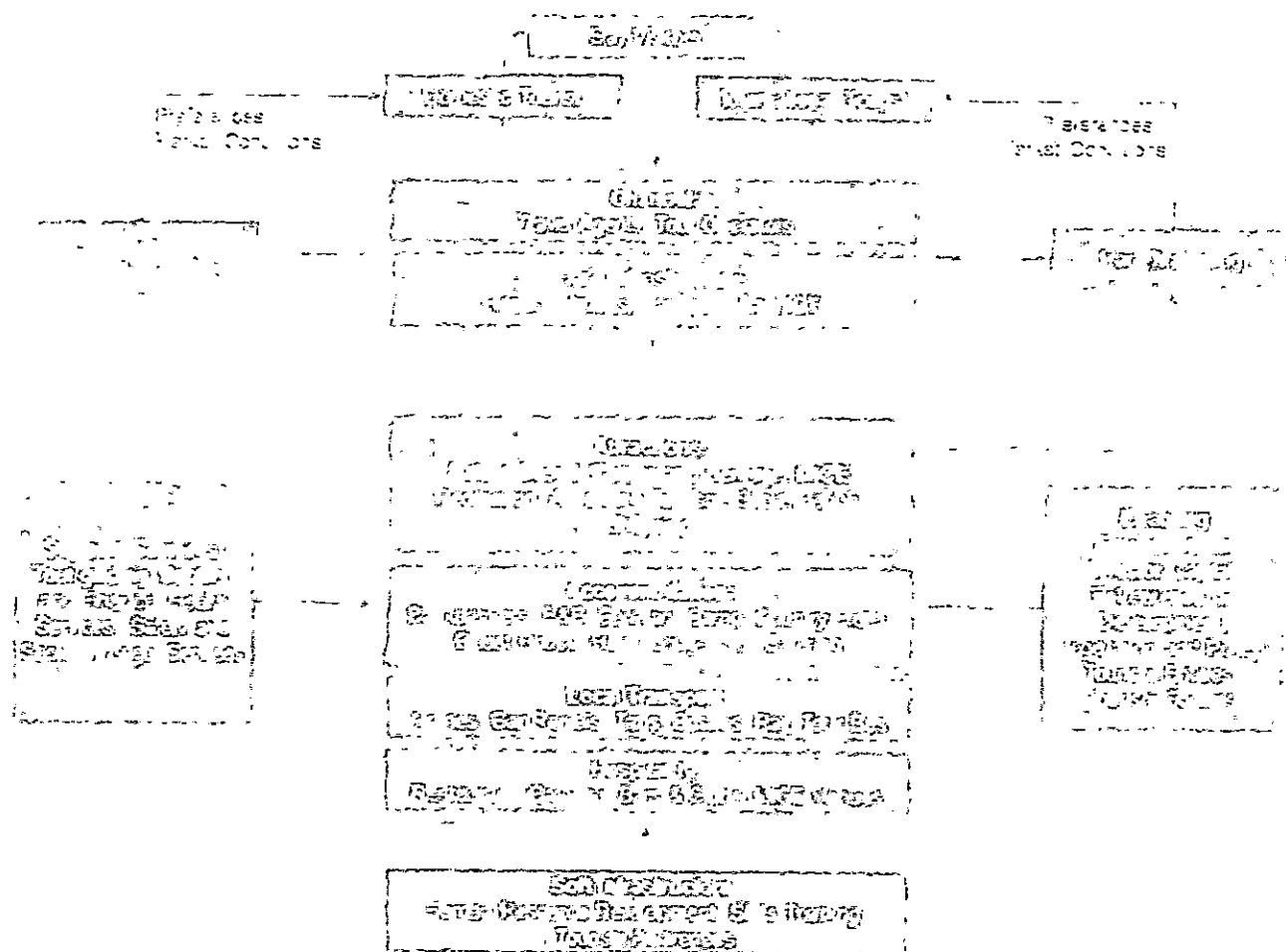


Figure 13: Tourism System

Source: Urban-Econ

Tourism development within CoW needs to create forward and backward linkages between the tourism products and other tourism products, and between tourism products and supporting services. All elements of the holistic system need to be in place for the tourism sector in Windhoek to operate as a whole.

4.3.5. Windhoek as a Tourist Attraction

Windhoek is a hidden gem with tourist attractions, holding significant potential. In general, the City is well-organised and offers easy access to existing and potential tourist products.

During primary research, it was found that 53% of tourism business owners thought that crime influenced their business. This indicates that safety and security will have to be addressed, especially in areas where tourism is to be promoted.

It was further found that 84% of tourist businesses believe that Windhoek is worth visiting by tourists. Yet only 14% of tourist businesses believed that there is clustering of tourism products in Windhoek. This indicates a great need to develop tourism-orientated precincts with tourist products and attractions that can anchor tourism within

The tourism business owners also indicated that leisure/vacation/holiday (63%) and visiting friends and/or family (60%) were the main drivers for tourists. It is interesting to note that only about one-third of tourist businesses indicated activity-based reasons such as shopping and sporting events for visiting Windhoek. This is an indication that tourists visit Windhoek for a wide range of reasons.

The top four tourist attractions indicated by tourist businesses in Windhoek were Heroes Acres (19%), Craft Market (14%), Joe's Beerhouse (13%) and National Art Gallery (10%). The top events that would support tourism in Windhoek were Windhoek Beer Fest (24%), local cultural festival (15%), Windhoek marathon (11%), skydiving (11%), horseback riding (10%) and camel rides (9%), hot air balloon (8%) and helicopter rides (7%).

In general, about two-thirds of tourist businesses in Windhoek believe that tourist attractions in Windhoek are reasonably well-maintained. In addition, Windhoek has many attractions for tourists, are well-promoted to foreign tourists, and Windhoek has good tourist signage. There are however several tourist attractions that were dilapidated and offered little value to tourists.

There is good clustering of existing and potential tourist products in the City centre that makes it ideal for walking tours and sightseeing. These tourist attractions are, however, underdeveloped and will require significant investment. In addition, plans to develop the Riverwalk development are well underway, which will provide Windhoek with an opportunity to develop a second tourist cluster. CoW will need to play its part in the development by ensuring that each area is appropriately zoned.

4.3.5.1. Circular Walkable Tourist Route

CoW needs to create several circular walkable tourist routes and focus on developing potential tourist attractions on these routes. The routes should have good signage that provides route and site information to tourists.

In addition, CoW should develop a tour guide mobile phone app (application) which tourists can download onto their cell phones. Based on the GPS location of the tourist and the tourist's interest, the app will provide information on the area such as its historical relevance, the nearest tourist route, attraction, activity or place of interest, as well as restaurants and amenities such as bathrooms. It should be noted that the CoW Smart City and Passenger and Transport Section are primarily focusing on gearing Windhoek towards becoming a Smart City; hence they have started with initiatives that include amongst others (PWC Namibia, 2019):

1. Open data channels (Internet of Things) - the plan is to avail general information to the residents and visitors which will include:
 - a. Review on Restaurants;
 - b. Information on where to find traditional (or any other) cuisine in the City;
 - c. Events around Town (cycling etc);
 - d. Identify popular spots for tourists and how tourists can get there safer.

The information from these channels will be used to improve the services provided to the residents and visitors.

2. Cow Passenger and Transport Section is currently developing a mobile phone app that will help users with identifying parking areas in the City. Furthermore, the idea is to use a mobile phone app to see the bus routes, where the busses are and expected times of arrival, so users/passengers can plan their trips better.

It will be beneficial if these open data channels and the CoW Passenger and Transport Section's app are interlinked with the abovementioned tour guide tourism mobile phone app.

As an example, one of the routes should start at the Tourist Information Centre in the city centre and must include the National Library and Archives, Franco Namibian Cultural Centre, National Art Gallery, National Theatre of

Namibia, Namibia Scientific Society, Owela Museum, 421 St. Petruskirche, Old Parliament Building, Alte Feste, Independence Museum, Craft Market (Independence Avenue) and Zoo Park.

A major constraint to the upgrading and development of tourist attractions is the ownership and custodianship of the various entities. Most of these tourist attractions are being managed by the National Heritage Council of Namibia, which has a limited budget to upgrade the sites. However, an application to the National Heritage Council of Namibia as per Decentralisation Enabling Act 33 of 2000 to take over the management of the tourist attractions.

A plan must be developed for each selected tourist attraction to improve its attraction value. The need to engage the custodian of each tourist attraction to enhance the site's attraction value by improving the following:

- ◇ Physical condition;
- ◇ Tourism signage;
- ◇ Ablution facilities;
- ◇ Parking (if applicable);
- ◇ Food & beverage (if applicable);
- ◇ On-site security

Since there is limited funding available, these attractions may need to become creative in how they will improve their attraction value. For instance, the National Gallery lacks the quality and quantity of art expected at a national gallery. To provide exposure for local artists in Namibia and to increase the quantity and quality of art exhibits, the National Gallery should hold an annual competition whereby the top five exhibits in each of the categories are exhibited at the museum for the year. An additional income stream for the National Gallery may be to act as an intermediary between the artists and potential buyers. Artists who select to do so may sell their art to the highest bidder at the end of each year, while the National Gallery will get a proportion of the proceeds.

Other issues that need to be addressed by CoW are security and Micro Small and Medium Enterprises (MSME) trade development along the various walkable tourist routes:

- ◇ To improve security for tourists, the city police force's tourism unit should patrol the route. These officers should receive a special training course to assist them on how to communicate with tourists. In addition, these officers should be trained to increase their knowledge on tourist attractions and other tourist support structures.
- ◇ The tourism route should provide opportunity to licenced informal traders to sell their products and services along the inner-city tourist route. These may include tuk-tuk taxis, fast food and cold drink stands.

When tourist numbers justify it, CoW may reconsider re-introducing a Hop-On Hop-Off Red bus to cater for tourists along the most popular tourist routes.

4.3.5.2. Riverwalk Development

The development of the Riverwalk initiative is primarily driven by the private sector, which proposes a waterfront area next to the river in Klein Windhoek. The development will focus on creating an entertainment area, including hiking trails, single track cycling, boutique retail, hotels and restaurants.

The development will support the numerous B&B's and other accommodation establishments that are already within the area. It is envisioned that the area will become a tourist hub. This can only be achieved if the area is a safe walkable area that allows tourists to move between their place of accommodation and the commercial area.

Security will have to be improved significantly since the area is known for vagrants and incidents of petty crime. Safety and security should be provided by CoW's police department's tourism section and supported by hard infrastructure such as adequate lighting, fencing and CCTV.

One of the main benefits of the project is that it provides links to the western suburbs of the city. This ensures better access to tourist attractions and events and tourism opportunities within this part of the city.

It must be noted that the initiative is primarily private sector-driven and detailed plans are being drafted. Figure

14 therefore only provides a simplified illustration of the 422 al Riverwalk Development Concept.

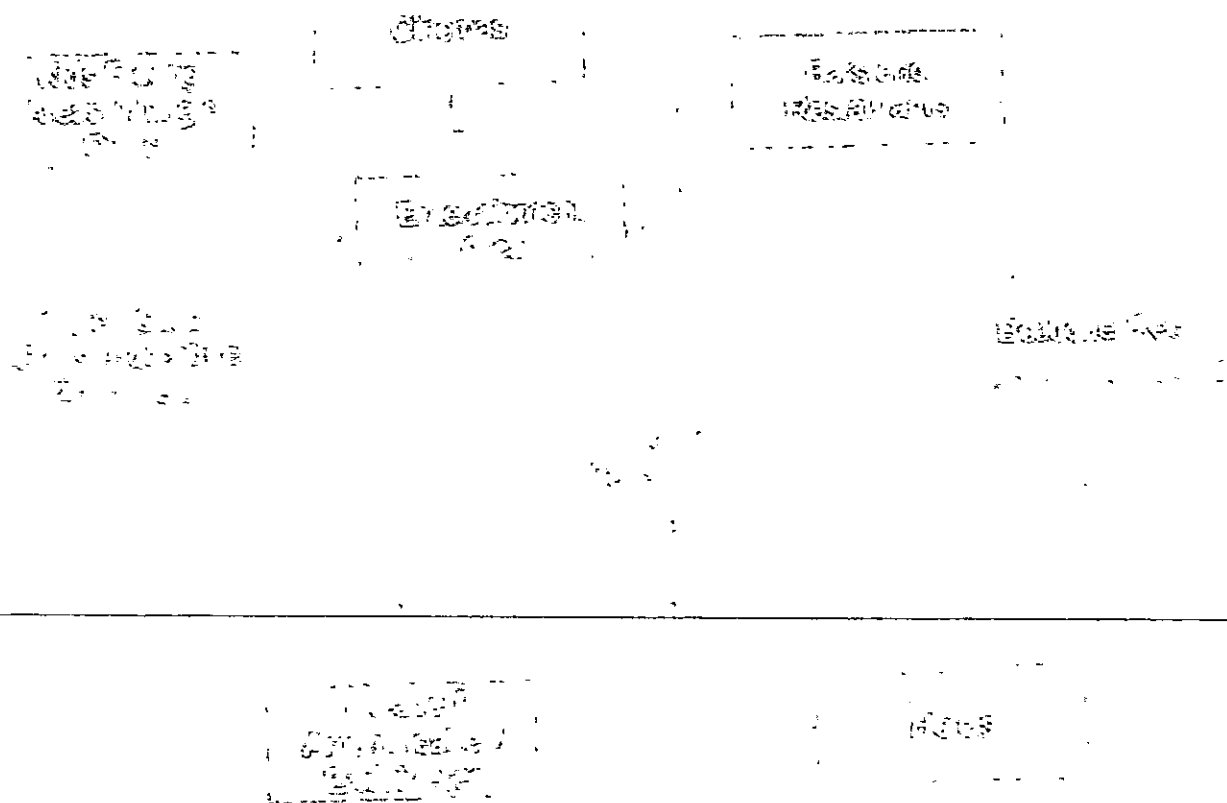


Figure 14: Potential Riverwalk Development Concept

4.3.6. Tourism Distribution Channels and Marketing

Tourism distribution channels link the tourist with the tourism attractions/businesses. Tourism distribution channels are also referred to as intermediaries (middleman). Traditional tourism distribution channels include travel agencies and tour operators. Newly developed tourism applications have changed the structure of the tourism system. The latest technology advancements now enable tourists to directly communicate with tourism attractions/businesses when doing business transactions. Thus, for the CoW to compete within the tourism space, it is important to stay updated with the latest travel applications that influence tourists' behaviours.

Tourism-orientated businesses in Windhoek lacked appropriate digital marketing and connectivity. Only 21% of tourist orientated business had websites and only 50% had business emails. In addition, only 17% of accommodation establishments were promoting themselves through Airbnb. The lack of websites and digital marketing in this industry is of concern as this is an industry that relies heavily on digital media platforms to promote itself. Many tourists investigate their options and make online bookings.

Destination marketing embodies the concept of collaborative marketing and coordination between different stakeholders to achieve a single goal, mainly to increase the number of tourists and their spending impact on an area as a whole.

Windhoek can only be successfully marketed as a destination attraction if all intertwining elements pertaining to the city's tourism system is in place and fully functioning. This includes the number one marketing tool that tourists use to learn more about a certain destination - the official website.

There is a need to promptly address access to tourism information with the CoW website. The current website needs to be more appealing to keep tourists intrigued

4.3.7. Transportation Infrastructure 424

Transportation infrastructure plays an important role in ensuring that a tourism destination is easily accessible. Therefore, the quality of access roads, airports, harbours, railways lines and ICT infrastructure within Windhoek has an influence on tourism development and growth.

Windhoek is in the fortunate position to have excellent hard infrastructure. The gateway to the country by air is the Hosea Kutako International Airport situated outside Windhoek. Several major airlines have routes to Hosea Kutako International Airport, including South African Airlines (Pty) Ltd, TAAG Angola, Airlink, Condor, South African Express (Pty) Ltd and British Airways (Comair). Qatar Airways, Ethiopian Airlines and KLM Royal Dutch Airlines service routes to Johannesburg, Cape Town, Luanda, Doha, Addis Ababa, Frankfurt and Amsterdam, amongst others, in Africa and Europe.

Traveling by train is also an option that tourists can consider. Trans-Namib connects most of the major towns including Windhoek. The Desert Express, a luxury train aimed at tourists, runs between Swakopmund and Windhoek. Currently, limited tourist train trips are done between Windhoek Station and Okapuka Lodge, and can be expanded, i.e. tourist train excursions to Northwards to Okahandja, southwards to Aris, Omeya and as far south as Rehoboth. This will enhance the creation of tourist nodes within the extended boundaries of City of Windhoek. This nostalgic tourist attraction possibility attached to commuting by train which the CoW should investigate in the form of set-day tourist excursions with multiple in-line hop-on-hop-off stops (to be developed along the existing railway lines south- and northbound within the extended boundaries of the City. For example and not limited to the following:

- ◇ Southbound:
 - Aris Station: Aris to be developed as a tourist activity hub with excursions to the lodges Gocheganas and Auas Safari Lodge.
 - Leutwein Station at Omeya: Golf, planned bird rehabilitation and public awareness facility, restaurants, hotels etc.
- ◇ Northbound:
 - Okapuka Station: Okapuka Lodge (crocodile feeding, restaurant, crocodile feeding etc.), Informative visits to the chicken and egg farms
 - Okahandja: Hotels, Crocodile and Ostrich Ranch etc.

A well-constructed and regularly maintained road network from Windhoek provides access to majority of towns, nature reserves, parks, safari lodges and tourist destinations in the country. Public transport consists mainly of taxis, while a bus service provides transport to and from residential areas.

Windhoek has a good road network that is perfect for self-drive and safari. Car rental is a convenient method for many tourists to get around the City. There are several car rental agencies in the City offering this service, including Avis, Budget, Imperial, and Triple Three Car Hire found in Windhoek.

Shuttle and transfers services can be arranged with local tour-operating companies from the Hosea Kutako International Airport to local tourism destinations such as guest houses in Windhoek.

4.3.8. Support Services

For tourists to contribute to growth within the City, supporting services play a crucial role. Supporting services are not primarily developed for tourism purposes but are interrelated to tourism development and growth. These services include the provision of exceptional health facilities for tourists, police visibilities, and disaster management stations, to name a few. Other support services related to tourism include tourism routes and tour guiding services.

As the capital of Namibia, Windhoek is the regional economic centre for the country. Windhoek has all the necessary support services for tourism, including private and public hospitals and a well-established financial

4.3.9. Accommodation

Accommodation is available in many forms. The various accommodation types relevant to the City pertain to backpackers, caravanning, camping, hotels, lodging, guest houses, self-catering, and bed and breakfast establishments. The accommodation range from five-star establishments to guesthouses and Airbnb etc. Each caters for a different market and adds a specific element of ambiance to the City tourism landscape.

4.3.10. Hospitality

The City's development is influenced by its rich history and intricate cultural ties. This is most reflected in the CoW's hospitality industry, where a variety of restaurants, pubs and bars, catering businesses and meetings, incentives, conferencing and events (MICE) venues are intertwined in the fabric of the City.

4.3.11. Tourism Entities and Forums

The main goal of tourism entities and forums is to facilitate the development of tourism, as well as provide a platform for various industries of the tourism sector to work together and share solutions, ideas and programmes with the intent of acting as a catalyst to improve tourism in the City. The Namibia Tourism Board (NTB) and the Hospitality Association of Namibia (HAN) are two of the most important facilitators of tourism in Namibia.

Only 18% of tourist businesses were registered with an official tourism association and only 15% were graded. There thus appears to be limited support for tourism entities and forums from the private sector. Many stakeholders questioned the relevance of these entities as they feel that they get very little value for being associated with these organisations. There also appears to be several Airbnb establishments that are not regulated and do not contribute to the Namibian Tourism Board.

4.3.12. Tourism Programmes and Projects 426

Table 4-9 provides a summary of the tourism programmes and projects.

Table 4-9: Tourism Programmes and Projects

Programmes	Projects
Tourism Attraction Development	<p>Circular Walkable Tourist Route</p> <ul style="list-style-type: none"> Develop circular walkable routes (with Route Markers) Employ qualified tour guides Develop a CoW tour guide mobile app (GPS prompts), that is interlinked with the open data channels currently being developed by the CoW Smart City Unit as mentioned by the CoW Tourism Strategy. (PWC Namibia, 2019) This tour guide should ideally also link with the mobile phone app which is currently being developed under the City of Windhoek Passenger and Transport Section. Upgrade and develop tourist attractions (with attraction custodians) Transfer custodianship of attraction to CoW if required <p>Riverwalk Development</p> <ul style="list-style-type: none"> Theatre Boutique retail Hotels Restaurants Entertainment area
Tourism Transport	<ul style="list-style-type: none"> Develop tourist transport between tourist attractions <ul style="list-style-type: none"> Bus service to airport Licensing of transport operators on and between tourist attraction routes, e.g. Tuk-tuk service, red bus, etc.
Tourism Zoning	<ul style="list-style-type: none"> Rezone businesses in tourism areas
Tourism Grading and Marketing	<ul style="list-style-type: none"> Promote tourism grading Tourism Destination Marketing - Update CoW website's tourism section (or create a CoW tourism website) <ul style="list-style-type: none"> Create interactive content for the website (text, images, videos) <ul style="list-style-type: none"> Walkable routes CoW tourist attractions Events Accommodation Restaurants Search Engine Optimisation Review Tourism Signage Relocate Tourism Information Centre
Tourism Skills Training	<ul style="list-style-type: none"> Basic tourism skills short courses, e.g. food preparation, receptionist training, housekeeping, etc.

4.3.13. Spatial Analysis

Various operators offer different City tours, some of which include a tour of Katutura. This seems to be especially favoured by tourists because it provides a balanced understanding of the City, how it was influenced through colonial administration, how people in the western suburbs live, and of the main tourist attractions such as the Alte Feste, Christuskirche, Independence Museum, Tinten Palast and various craft markets. This is a tourist product to encourage and expand, and more operators with bicycle tours and e-bike Tuk-Tuks are also entering the market.

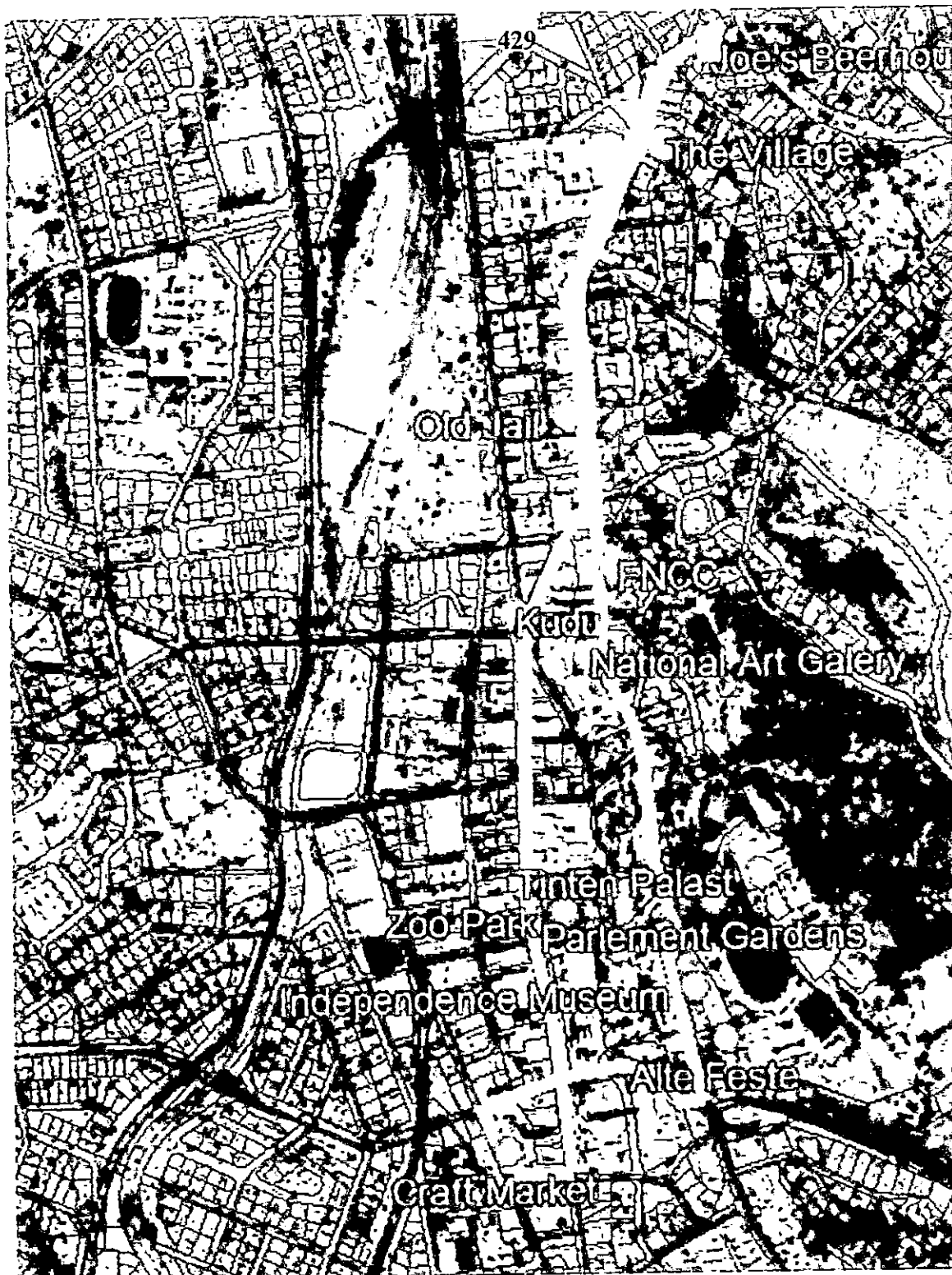
However, the majority of tourists explore Windhoek's key attractions on foot and they have very few facilities and little guidance to find and explore these attractions. The Riverwalk concept, developed by local private stakeholders together with the City of Windhoek, regards the rivers in the city as an asset that can be used and developed as a non-motorised transportation spine running from the Avis Dam east of the City to the Goreangab Dam to the west of the City. It will contribute towards better integration of the City and also provides for the

development of various types of tourists, business, community, residential, recreational and other facilities along the way. It aims to encourage properties abutting onto the Riverwalk to turn their facades towards the river walk rather than towards the street, and contribute to the ambiance of the proposed facility. Obviously, landscaping, paving for cycle and pedestrian lanes, street cafes, integration with existing hotels and guest houses, etc. all forms part of the concept.

In addition, it is also acknowledged that it should be integrated with the rest of the city and a number of "city walks" could branch off from the Riverwalk and take tourists and locals alike to particular attractions or clusters of attractions. For example, from Joe's Beerhouse, a short link along Nelson Mandela Avenue to the west leads to the village where boutique restaurants and a pleasant environment offers something to drink before the traveller could follow a sidewalk towards the south along Robert Mugabe Avenue. Along the way they could visit the Franco Namibian Cultural Centre, and its little restaurant, the National Art Gallery, the Theatre of Namibia, the Tinten Palast and Parliament Gardens, the Independence Museum, Christuskirche and the Alte Feste. From there they can walk down to the Old Breweries with its craft markets, small galleries and quaint coffee shops. The circle gets closed by a walk along Independence Avenue through the Zoo park, past the Kudu and the old jail, and back to the village and Joe's Beerhouse. Obviously, this route can be entered and exited at any point. An app which could be downloaded on a smartphone could add substantial value to the proposition, as will proper signage and possibly some well-trained guides that could be available at a certain point or points in the route.

However, just identifying a route is not good enough. It needs to be developed as such with proper information signage, brochures, websites & smartphone based applications. It must have developed and kept walkways, efforts must be made to provide shade along the route, and one must ensure that the attractions are managed and operated in a way that tourists actually find them open and something to appreciate inside them. Map 6 below provides an idea of the alignment of the river walk while map 7 gives an indication of a possible "City Walk" linking the river walk to the main attractions in the city centre.

Map 6: Schematic of the River Walk proposal



Map 7: Potential Circle Route

4.3.14. High-Level Bulk Infrastructure Assessment

4.3.14.1. Transportation Infrastructure Assessment

For the circular walkable route the NMT infrastructure should be implemented and retro-fitted to align with the new NMT Infrastructure Design Guidelines.

The current road network is of good standard provides many commuting options through town roads in terms of

private transport, however the public transport system should be addressed to be more tourist friendly as it is currently acting mostly in a labour force transporting capacity. CoW should provide a dual service, with operating a bus service, while the private sector can provide tuk-tuks, taxis, and potentially a red Hop-on Hop-off bus service along the circular tourist routes (see section 4.3.5.1) to the City centre. Licencing agreements with operators needs to be developed to allow the private sector operators to operate in the area. Further, the CoW should be open to SMART private transport operators such as UBER, which are known to international tourists.

The current TransNamib railway system acts more in a cargo transporting capacity with commuter rail transportation still being operated, but on a minimal scale compared to commuting by road; however travelling by train has nostalgic connotations to it and might be worth investigating the option for tourists to have the train-option between Hosea Kutako International Airport and Windhoek. Traveling time will however be longer and less flexible than commuting by road. The railway museum at the Windhoek station showcases the exciting history of the development of the Namibian railway infrastructure since challenging times to where it stands today.

4.3.14.2. Electricity Infrastructure Assessment

Electricity demand is of sufficient quantity to provide for tourism needs.

4.3.14.3. Information & Communications Technology Assessment

The telecommunication distribution network throughout the City is easily and effectively accessible. This is true for high capacity fiber-optic networks as well as cellular- and data networks. The roll-out of 5G technology in the near future will add unprecedented advantages in the communication field which should be utilized fully to enhance tourism attraction, safety, marketing and experience.

Table 4-10 illustrates the outcomes of the tourism strategic interventions, programmes and projects.

Table 4-10: Strategic Intervention Outcome for Tourism

Indicator	Rating	Comment
Tourism Business Growth		The Tourism industry was growing before the COVID pandemic. However, the effect of the Covid pandemic will have devastating effect on the industry.
Tourism Business Confidence		Tourism growth will increase tourism orientated business confidence.
Business Expansion		Tourism businesses will expand due to more demand for tourism orientated products and services.
Tourism Business Promotion		The CoW tourism website provides local tourism-orientated business with the opportunity to promote their businesses without having to create their own website.
Tourism Promotion		The CoW tourism website, together with appropriate Search Engine Optimisation, will promote the tourism offering in Windhoek.
Tourist Attractions		Improving the quality of tourist attractions in Windhoek will improve the overall tourism product offering in CoW.
Tourist Accommodation		Windhoek has a well-developed tourist accommodation industry with various accommodation options.
Tourism Grading		More graded tourism accommodation options will enhance the accommodation profile of CoW. It will also provide tourists with insights into the quality of the product offering.
Tourism Associations		More tourism orientated businesses will be registered with an official tourism association.
Local Transport System		No Change
Tourist Support Structures		Windhoek has strong tourism system including support systems, enabling environment and soft infrastructure
Ports		No Change
Tourism Safety and Security		No Change
Tourism Information Centre		A more visible tourism information centre will be able to promote tourist attractions to tourists.
Tourism Signage		Improved signage will enable tourists to find the tourism information centre and tourist attractions more easily.

Note! Colour coding is used to indicate the anticipated status of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability, after all proposed interventions had been implemented. The ratings are:

Gre = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.4. Strategic Intervention: Micro, Small & Medium Enterprises (MSME)

4.4.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to diversify and expand existing formal & informal businesses in Windhoek through business support and networking and to stimulate the development of new businesses.

4.4.2. Factors Influencing MSME Development

Figure 15 and Table 4-11 illustrate several factors that influence the market attractiveness for MSME Development.

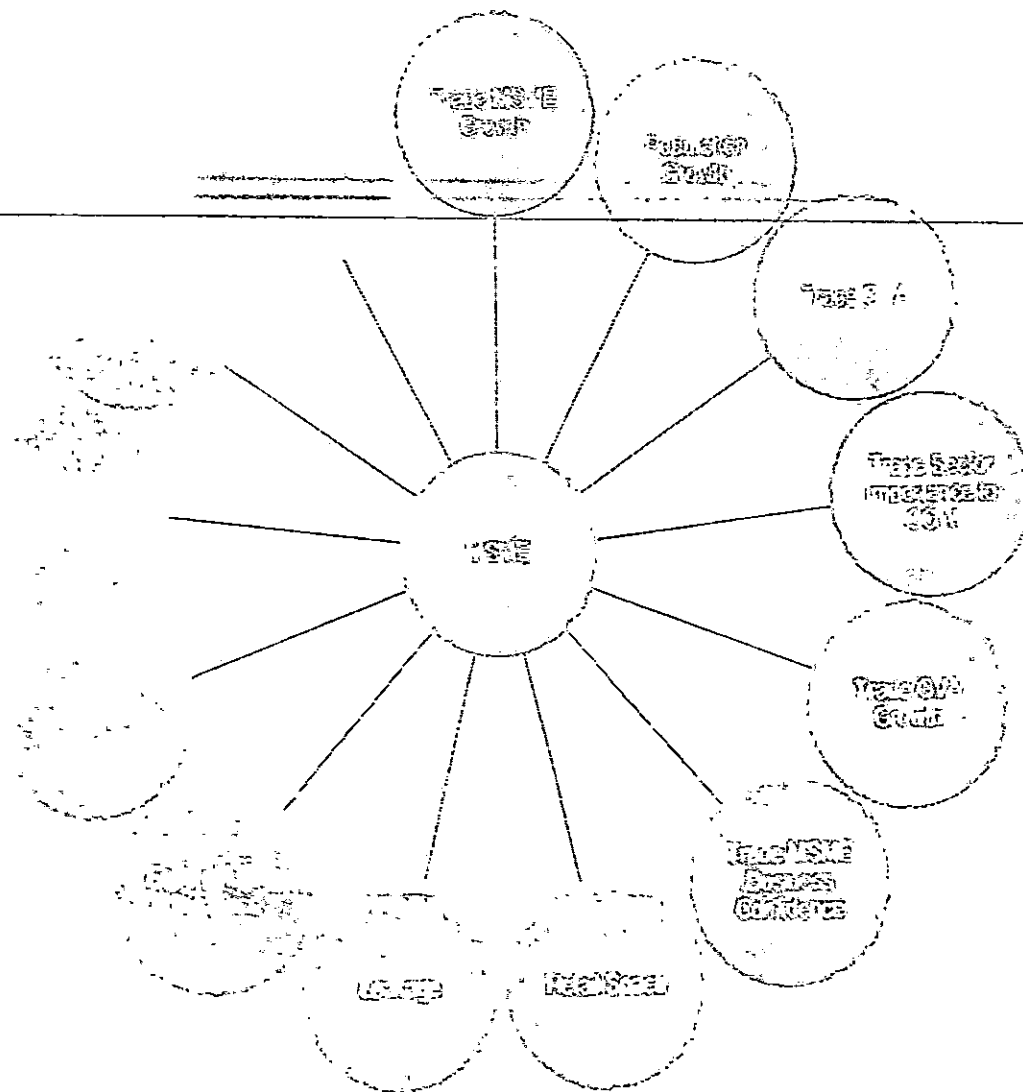


Figure 15: Factors Influencing MSME Development

Table 4-11: Factors Influencing MSME Development

433

Indicator	Rating	Comment
Trade MSME Growth		About 39% of trade businesses indicated that they had some growth, while 46% indicated some decline in turnover.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Trade GVA		Trade GVA in Khomas Region was about N\$1,127.67 million in 2011. Khomas Region contributed an estimated 11.47% of the national trade GVA.
Trade Sector Importance to CoW		The trade sector in Khomas Region contributed about 4.16% of total GVA in Khomas Region in 2011.
Trade GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016.
Trade MSME Business Confidence		Some 66% of businesses in the sector indicated that they expect growth in turnover in the next 12 months for their business pre COVID compared to only 15% who expected a decline in turnover. Other indicators were: employment (41% vs. 10%), market share (44% vs. 10%) and physical space (26% vs. 6%)
Retail Space		Some 36% of the businesses indicated that there is not enough retail space available in Windhoek, but 56% also indicated that there is rental space available in their neighbourhood.
Leakage		Only 35% of businesses procure their products in Windhoek and 17% in the rest of Namibia.
Ease of Doing Business		Namibia ranked a low 107 out of 190 nations for the ease of doing business. Namibia scored low on many sub-sectors, including Starting a Business (172), Dealing with Construction Permits (83), Getting Electricity (71), Registering Property (174), Getting Credit (73), Protecting Minority Investors (99), Paying Taxes (81), Trading Across Borders (136), Enforcing Contracts (58) and Resolving Insolvency (125).
Permits		Only 58% of businesses applying for liquor licenses and 60% of businesses selling food indicated that the process to require the necessary permit was easy or very easy. Some 36% of those applying for liquor licenses and 22% of those that sold food indicated that their permit application process took longer than 3 months.
Local Business Promotion		Only 30% of local businesses have business websites.
Stakeholder Engagement		Only 33% of businesses have ever participated in local forum meetings, while only 22% participated in local economic development meetings, 16% in local police forums and 27% attended or participated in investment conferences or trade fairs.
Incentives		Some 9% of businesses enjoy benefits from Free Trade Agreements (FTAs) and 8% enjoy benefits from Economic Partnership Agreements (EPAs). In addition, only 7% exploit local or regional incentives of which 58% were rebates, 21% were fiscal and 21% were non-fiscal.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.4.3. Introduction

MSME is an important component of the Wholesale and Retail sector in Windhoek. With the Khomas population growth rate at about 3.59% p.a., it is predicted that the population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030. This almost guarantees market growth in Windhoek, which is an attractive offering for local business and potential investors.

Windhoek needs to market itself as an attractive investment location for establishment of enterprises, which in turn can create further job opportunities and spin-offs for local people and increase investment and economic growth in the area. To facilitate business development, CoW needs to focus on reducing red tape, improving the ease of doing business and providing MSME with investment incentive support.

The CoW is currently in the process of developing a MSME Development Strategy, which focuses on 4 key areas as follows (Joodt, 2020) :

- Development of a system for institutional support
- Strengthening MSME sector and providing institutional support
- Encourage local growth

- Establishing local market

434

The biggest challenge for MSME and in particular product development within the City as well as national is that there is no local institution that can test products or issue and register barcodes as all products need to be sent to South Africa for these essential steps to be in place. (Joodt, 2020)

4.4.4. Stakeholder Engagement and Partnerships

CoW needs to engage the local business community on a regular basis to discuss Windhoek's economic development and barriers preventing it. These engagements should be led by the **Department of Economic Development and Community Services** and form part of the **Economic Development and Investment Forum**.

Part of the engagement process should be to **review processes**, especially to identify how business-related processes can be made faster, easier and more efficient from a business perspective. The main purpose of the review will be to develop **e-government systems** for a variety of CoW and national government processes, including dealing with construction permits, getting electricity and registering property as well as permits such as to sell food.

CoW should ensure that it does not duplicate MSME developmental services already in existence in Windhoek. **Development partners should be identified in Windhoek who can provide services such as research and development, entrepreneurship and incubation, innovation marketplace and marketing and promotion.** The development partners may include NCCI Khomas Region, NUST, Development Bank of Namibia, etc. By compiling a database of development partners and services, CoW together with partners can offer a holistic service offering to MSMEs.

CoW already provides MSME with various incubation options. However, the following challenges remain:

- **Infrastructure:** These incubation businesses are that they have nowhere to go when they 'grow out of their own shoes'.
- **Vision:** Business owners of these incubation businesses don't operate on long-term growth, but rather on day-to-day survival.
- **Maintenance:** High expenditure by CoW on renovation and upkeep.

It is proposed that CoW must provide **tiered clustered incubation hubs and facilitate owners to get support from bigger players in the industry.**

4.4.5. Retail Capacity

Retail capacity refers to the 'space' available to retailers to utilise to sell their goods and services. There is adequate formal retail space available in Windhoek, but **informal retail space** is underdeveloped, especially the Craft Market on Independence Avenue, which also serves as a tourist attraction. There is a need to **upgrade trading facilities** including the **development of public facilities near trading venues.**

It is important that traders recognise the impact that online shopping has on the retail environment. There are many online 'shopping malls' which are increasing their market share at a rapid rate. It is estimated that global online sales will rise to 9.1% by 2019, compared to 6.1% sales in the 2014. This shows a growth rate of approximately three percent — clear proof of the e-commerce expansion. (Banerjee, 2015)

Forrester Research forecasts that business-to-business (B2B) e-commerce in the USA will reach \$1.8 trillion and account for 17% of all B2B sales in the USA by 2023. At the end of 2018, Forrester expects e-commerce to have reached \$1.1 trillion and represent 12% of total B2B sales in the USA. Forrester Research also forecasts a compound annual growth rate (CAGR) of 10% for B2B e-commerce between 2018 and 2023. (Bonde, Bruno, Wu, Ruhi, & Birrell, 2019)

Forrester Research states that online retail sales will grow at an average of 11.7% per year between 2018 and 2023 in Western Europe. By 2023, over half of computer and consumer electronics purchases and almost a third of clothing, footwear, and accessories purchases will be made online.

In 2018, there were 272 million online adults in Southeast Asia (Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam). The scale of online adults is making this geographical region an important market for online retailers. Forrester Research further expects that online retail in the region will grow at a compound annual growth rate (CAGR) of 23% to reach \$53 billion in 2023. (Meena, Wu, Kumar, & Varon, 2018)

In 2016, Hon. Tjekero Tweya, then Minister of Information and Communication Technology (MICT) cited some of the progress in his presentation of ICT as a foundation for Namibia's economic prosperity when he stated that "The ICT sector of Namibia is still small but rapidly growing. The last decade a series of legislative processes aimed at promoting ICT in Namibia were put in place, such as Namibian Communication Act, 2009, ICT Policy 2009, Telecommunications Policy, Broadcasting Act 1990, Postal Policy, and New Licensing framework and the DTT Policy. In today's era, ICTs are also used as a planning tool that directly influences areas upon which a country can build its economy. The sectors of ICT can without a doubt generate significant growth and wealth in their own right."

The Minister also reminded investors that Namibia is one of only a handful of African countries – among them Rwanda, Tanzania and Malawi – that have completed the deployment of Digital Terrestrial Television, and that "ICT is a crucial enabler for innovation sustainable socio-economic development and a knowledge-based economy as envisaged in Vision 2030. MICT is working tirelessly to ensure that all Namibians have access to ICT. The ICT Usage sub-index has shown improvements in ICT usage for individual, business and government usage. Namibia's mobile phone network population coverage has increased exponentially to 95% since the 1990s, while subscriptions are recorded at 119.16 per hundred inhabitants. Namibia has successfully implemented the Digital Terrestrial Television (DTT) from analogue to digital television." (Mamabolo, 2016)

Although Namibia has made significant progress to improve its ICT infrastructure, this study has found, during primary research in Windhoek, that only 30% of formal and informal retail businesses and 21% of tourist businesses have websites. In addition, only 79% of formal and informal retail businesses, 71% of manufacturers, and 50% of tourist businesses had a business email. Most of these business emails were generic email addresses such as Gmail. This is an indication that businesses in Windhoek need significant support to create an online footprint.

One way that CoW could assist small businesses to improve online retail is to roll out Wi-Fi hotspots within commercial areas. In addition, CoW should develop an **Export Strategy** to identify local businesses that produce products that could potentially be exported, and potential markets for locally produced products including leather, cosmetics, etc. Volumes play a critical role in manufacturing. Windhoek's relatively small local market does not allow manufacturers to operate at maximum efficiency. CoW's approach should focus on creating niche markets within which it can produce more than the needs of the local market and which it can export.

Only 35% of businesses procured their products in Windhoek and an additional 17% in the rest of Namibia. The same number of businesses that procures their products from South Africa is 35% as compared to locally. The main reason indicated by business for this leakage is that local suppliers are more expensive than buying from other countries (48%). Thus, there is significant leakages in the retail sector. As mentioned above in Section 4.4.6, volumes play a critical role and this leakage should not only be addressed by import substitution, but also by export promotion of key items to increase volumes and in turn decrease the local costs thereof.

CoW can support local business by creating or supporting a 'Buy Windhoek' programme for both business-to-business as well as business-to-consumer purchases. In addition, CoW can increase local procurement by increasing its priority in Windhoek's supply chain.

4.4.8. MSME Programmes and Projects

Table 4-12 provides a summary of the MSME programmes and projects.

Table 4-12: MSME Programmes and Projects

Programmes	Projects
Local Forums	<ul style="list-style-type: none"> WED and Investment Forum
Localisation	<ul style="list-style-type: none"> Create or support a 'Buy Windhoek' programme Local procurement should be prioritised by CoW's supply chain.
MSME Support and Promotion	<ul style="list-style-type: none"> Include a MSME support desk inside the Business Development / Investor Liaison Desk <ul style="list-style-type: none"> Assist small businesses to apply for national incentives. Assist small businesses with marketing and promotion Business Directory Assist with Business Email and Websites
Informal Trade Support	<ul style="list-style-type: none"> Develop levels of incubation centres Upgrade selected trading facilities Develop public facilities near trading facilities
Improved Wi-Fi Connectivity	<ul style="list-style-type: none"> Roll out Wi-Fi hotspots
Partner with MSME Development Agencies	<ul style="list-style-type: none"> Partner with Development agencies such as NCCI Windhoek Branch, NUST, etc. on: <ul style="list-style-type: none"> Research and Development Entrepreneurship and Incubation Innovation Marketplace Marketing and Promotion
Reduce Red Tape	<ul style="list-style-type: none"> Review permit processes Develop e-systems for the following processes: <ul style="list-style-type: none"> Dealing with Construction Permits Getting Electricity Registering Property Develop e-systems for permits: <ul style="list-style-type: none"> Liquor license To sell food licence Certificate of Fitness
Export Development	<ul style="list-style-type: none"> Develop an Export Strategy <ul style="list-style-type: none"> Identify local businesses that produce products that could potentially be exported Identify potential markets for locally produced products including: leather, cosmetics, etc.

4.4.9. Spatial Analysis

437

MSMEs are such an important part of the Windhoek economy that they must be integrated in all layout and zoning decisions. It has already been stressed that business and industrial land should be “decentralised” closer to the periphery and the people. In addition thereto, it is very important to consider the mix of erven types and sizes included in such planning. It is of particular importance that MSME needs, such as incubation hubs and small industrial units, be incorporated in the initial design mix. A range of possibilities needs to be available, from the lowest level and cheapest incubation hub, through clustered business units to larger units to where successful MSMEs can move if they grow out of their shoes. The same would be true for industrial areas where a similar approach must be followed to effectively facilitate MSME development and employment creation.

Therefore, MSME facilities must be integrated into the planned urban fabric and regarded as an important component of the fabric, often supporting their more developed counterparts as well as larger formal businesses. Mixing these together not only benefits the smaller traders and manufacturers, but also helps the bigger ones to obtain services at reasonable rates and creates synergies that are to the benefit of all. Finally, the agglomeration effect of planning for larger more varied business and industrial areas increases the viability of all the operations that operate in close proximity of each other..

4.4.10. High-Level Bulk Infrastructure Assessment

4.4.10.1. Electricity Infrastructure Assessment

The area surrounding the Ramatex factory is suitable for MSME development and in close vicinity of the Haloid & Goreangab Load Centres. The Brakwater area is additionally suitable and in close vicinity of Lafrenz & future Brakwater Load Centre. These load centres appear to have sufficient capacity for growth and development of the MSME sector in the mentioned areas. Haloid and Goreangab Load Centres were upgraded in 2015 and Lafrenz Load Centre was upgraded 2019/2020.

4.4.10.2. Information & Communications Technology Assessment

The telecommunication distribution network throughout the City is easily and effectively accessible. This is true for high capacity fibre-optic networks as well as cellular- and data networks. The City of Windhoek is currently busy investing in a new fibre optic in line with its SMART City initiative with the aim to provide its residential and commercial users to high-speed ICT connectivity. The roll-out of 5G technology in the near future will add further support in terms of unprecedented advantages in the wireless communication field.

The implementation of these services supports the Harambee Prosperity Plan.

4.4.11. Strategic Intervention Outcome⁴³⁸

Table 4-13 illustrates the outcomes of the MSME strategic interventions, programmes and projects.

Table 4-13: Strategic Intervention Outcome for MSME

Indicator	Rating	Comment
Trade MSME Growth		By improving informal trade space and marketing Windhoek as an attractive investment location for MSME by reducing red tape, improving the ease of doing business, and providing MSME with investment incentive support, the number and size of the MSME sector will increase within the city.
Population Growth		No Change
Trade GVA		By improving trading space and marketing Windhoek as an attractive investment location for MSME by reducing red tape, improving the ease of doing business, and providing MSME with investment incentive support, the trade and wholesale GVA will increase within the city.
Trade Sector Importance to CoW		The trade and wholesale sector will increase and become an important sector within Windhoek.
Trade GVA Growth		Additional national trade sector GVA growth.
Trade MSME Business Confidence		MSME business confidence will increase as the industry experiences growth.
Retail Space		Spatial optimization improvements at informal markets and incubators will increase the total amount of retail space available in Windhoek.
Leakage		The 'Buy Windhoek' programme and placing more emphasis on local procurement within Windhoek's supply chain will reduce leakage.
Ease of Doing Business		The review of processes and increased use of e-government systems will improve the ease of doing business.
Permits		The review of processes and increased use of e-government systems will decrease the waiting time for permits (building permits, compliance certificates etc)
Local Business Promotion		The CoW website directory will give more exposure to local business.
Stakeholder Engagement		The Economic Development and Investment Forum will provide local MSME with the opportunity to engage with CoW on their issues.
Incentives		The inclusion of the MSME support desk inside the Business Development / Investor Liaison Desk will assist small business to apply for national incentives.

Note! Colour coding is used to indicate the anticipated status of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability, after all proposed interventions had been implemented. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.5. Strategic Intervention: Informal Sector

4.5.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to diversify, integrate and support existing informal businesses in CoW through business support, improved infrastructure, and facilities.

4.5.2. Factors Influencing Informal Sector Development

Figure 16 and Table 4-14 illustrate several factors that influence the market attractiveness for informal sector Development.

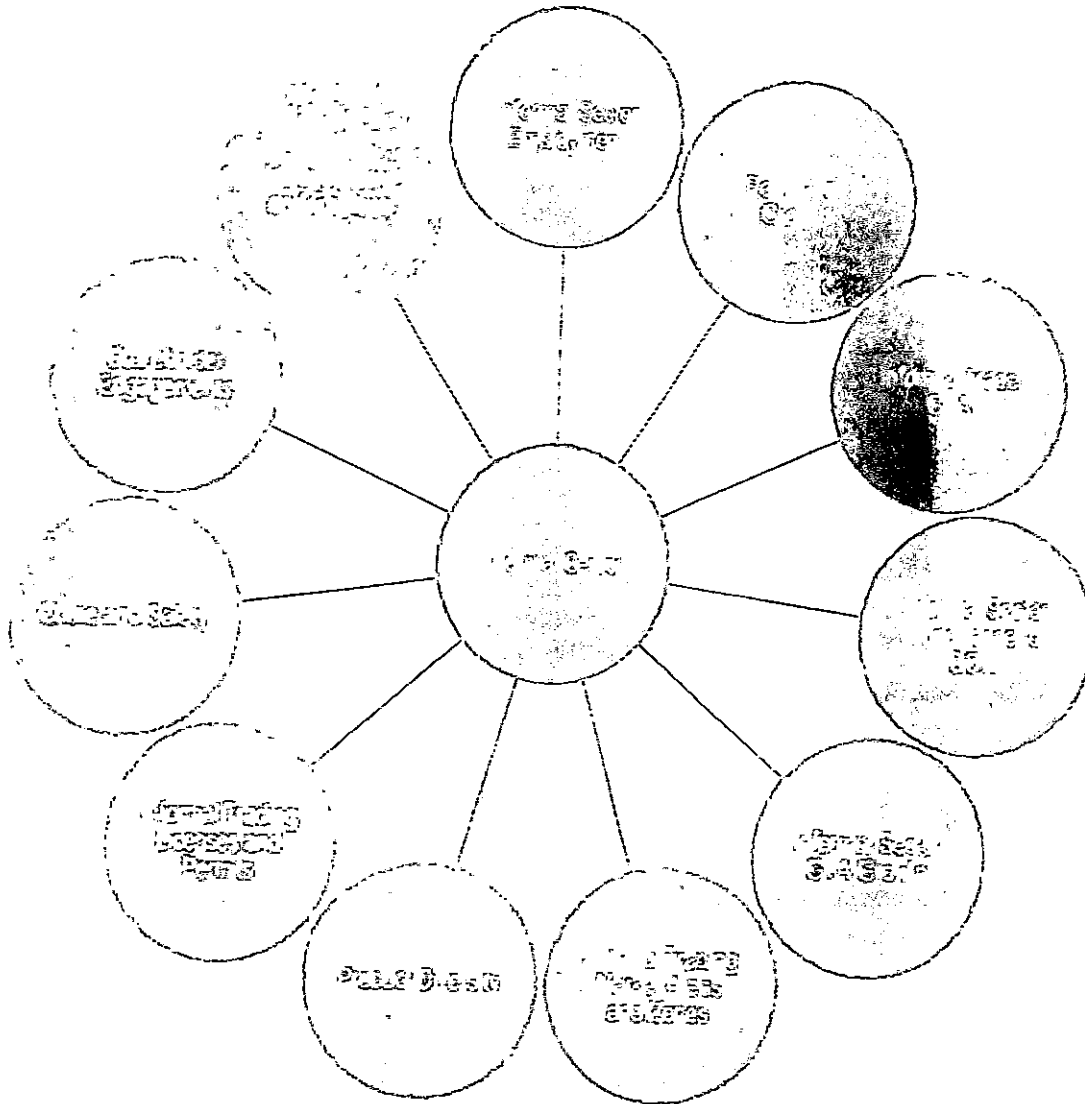


Figure 16: Factors Influencing Informal Sector Development

Table 4-14: Factors influencing Informal Sector Development 40

Indicator	Rating	Comment
Informal Sector Employment		The informal sector employs 64 266 individuals, which constitutes 38.9% of total employment in Khomas Region in 2018. The informal sector provides employment and income opportunities for low skilled and unskilled individuals, which can reduce poverty and unemployment rates.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas Region population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Informal Sector GVA		Trade GVA in Khomas was about N\$1,127.67 million in 2011. Khomas Region contributed an estimated 11.47% of the national trade GVA. There is currently a lack of data available to measure the performance of the informal sector.
Informal Sector Importance to CoW		The informal sector plays a key role in stimulating economic development and creates employment opportunities for those looking for work or unemployed.
Informal Sector GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016. There is currently a lack of data available to measure the performance of the informal sector.
Informal Trading Market Areas and Zones		There is a need for a more structured informal sector, equipped with Wi-Fi and facilities to support the informal trade.
Product Diversity		Informal traders generally sell very similar goods, such as jewellery, trinkets, and hand-crafted statues. However, there is a need to increase the variety of products sold.
Informal Trading Licenses and Permits		Only 58% of businesses applying for liquor licenses and 60% of businesses selling food indicated that the process to require the necessary permit was easy or very easy. Some 36% of those applying for liquor licenses and 22% of those that sold food indicated that their permit application process took longer than 3 months. There is currently a need to improve regulations of informal trading permits in the CoW and develop efficient management practices regarding licences and permits for the informal sector. A large number of informal traders are involved in food preparations, which requires regulation and enforcement of better hygiene practices.
Crime and Safety		Crime plays an important role in the growth and development of the informal sector. 61% of businesses indicated that crime plays a role in the success of their businesses. Crime also deters tourists from visiting informal trading areas.
Stakeholder Engagement		Only 33% of businesses have ever participated in local forum meetings, while only 22% participated in local economic development meetings, 16% in local police forums and 27% attended or participated in investment conferences or trade fairs. There is currently no forum available for the informal sector to engage government and raise concerns.
Infrastructure and Facilities		There is a strong need to install and/or upgrade infrastructure and facilities available in the areas/zones for informal markets. This relates to improvement and maintenance of service delivery infrastructure, including electrical power networks, clean water supply, and sanitation.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

 = Neutral;  = Poor;  = Average;  = Good

4.5.3. Introduction

The informal economy comprises of very small enterprises (frequently fewer than five individuals) that generate earnings for individuals. Considering the high unemployment rate (37.6% for Namibia, 2018), the informal sector continues to show potential in terms of its contribution to employment, but also to poverty reduction and the economy as a whole.

Therefore, CoW needs to increase designated informal trading areas or zones available in the City. This will enable informal traders to experience higher foot traffic and develop as established businesses with the opportunity to become sustainable. This will have a greater effect on employment and income levels over the long term.

In the strategic intervention for the informal sector, the focus is given to the following areas:

- Informal trade support
- Establishing the informal sector
- Establishing platforms for the City to engage with informal traders

4.5.4. Stakeholder Engagement

Similarly, to the MSME Development strategic pillar, there is a need to increase engagement with local informal traders, regularly, to identify ways to provide support and address any challenges or concerns the sector may be experiencing. These engagements should be done through the establishment of an **Informal Sector Forum** and form part of the **Economic Development and Investment Forum**.

The primary purpose will be to create a conducive business environment for the informal sector to grow, develop and become sustainable over the long term. These platforms will also address the need to inform informal traders of designated areas and zones in which to operate, as well as manage permits and licensing.

4.5.5. Informal Trading Market Areas and Zones

Considering the economic, spatial, and infrastructural elements of the City, the informal trading market areas and zones makes provision for more efficient management and regulation of the informal sector in a structured environment. The informal trading market areas and zones also make provision for improved service delivery of facilities and infrastructure, which addresses the need for clean water supply and sanitation facilities as well as cleaning services. Additionally, many informal business owners have to transport their goods from their household to their place of business and back, on a daily basis. This is time-consuming and creates additional risks of continuously moving their stock, which can be addressed by providing adequate storage facilities, in the designated trading areas and zones, for licensed informal businesses.

Informal traders should be able to operate without external disruptions as a result of crime. The informal trading market areas and zones require a sense of safety and reduced crime. This will not only reduce theft and other crimes taking place in the markets but also encourage tourists and the general public to visit and shop in the informal trading area. This can be addressed by the CoW encouraging police to patrol the informal markets.

Transport, particularly tuk-tuks or mini-taxis, play a significant role in the informal sector as many informal traders and shoppers do not have their own vehicles. The City should facilitate designated pick-up and drop-off zones near the informal markets to provide easier access and control any increased traffic. Tuk-tuks also have an important role in the City as they transport tourists from one area of interest to the next.

With designated informal trading market areas and zones, the CoW can establish targeted access to internet connectivity, with a special focus on the informal sector. This could include the provision of Wi-Fi hotspots that can be rapidly deployed, which enables informal businesses to easily communicate with suppliers and customers during trading hours. Furthermore, it will create opportunities for the informal sector to become more competitive by improving access to information and markets.

4.5.6. Informal Trading Licences and Permits

With the established designated informal trading market areas and zones, the CoW is able to better regulate, monitor and enforce permits for informal traders. In order for the informal sector to benefit from the aforementioned infrastructure and facility development, informal traders must be licenced and have up-to-date permits in place.

4.5.7. Informal Sector and Tourism Linkages

Promotion of the informal sector and tourism unlocks several opportunities for economic development in the City. Tourists typically stimulate an economy by spending in a wide range of sectors, including the informal sector, thereby boosting informal trade, and stimulating GDP growth. From a socio-economic perspective, tourism empowers women, the youth, and marginalised people, among others. It supports the development of new

businesses, enables the creation of employment opportunities, and provides an added incentive for community revitalisation. In additions, it aids in protecting a region's unique heritage, culture, and environmental assets.

As previously stated, CoW needs to create several **circular walkable tourist routes**, which focuses on developing potential tourist attractions on these routes. These tourism routes should also provide the opportunity for licensed informal traders to sell their products and services along the inner-city tourist routes. These may include tuk-tuk taxis, fast food stands and products that are unique to the area, such as hand-crafted jewellery and statues. Through engagements, there should be an encouragement for informal traders to increase the variety of goods and services offered. A greater variation of goods and services will entice tourists to visit informal trading markets and spend more time in these markets. This will ultimately create increase in the number of visitors to the informal trading markets.

4.5.8. Informal Sector Programmes and Projects

Table 4-15 provides a summary of the Informal Sector programmes and projects. Several programmes and projects may overlap with the MSME development strategic intervention.

Table 4-15: Informal Sector Programmes and Projects

Programmes	Projects
Informal Trade Support	<ul style="list-style-type: none"> Upgrade selected informal markets <ul style="list-style-type: none"> Oshetu market at the Katutura Single Quarters Soweto market Nangenda Kaduuluma market in Wanaheda Lyeeta open market in Okuryangava Develop public facilities near informal markets <ul style="list-style-type: none"> River Walk Initiative Non-motorized Transport Strategy Public Transport Nodes Consider developing new informal markets based on the locality decisions made by informal traders themselves: <ul style="list-style-type: none"> "4 Ways" – Corner of Monte Christo and Matshiishi Roads Eveline Street China Town – clustered street vendors "Fruit and Veg Market" in Nelson Mandela Avenue - Klein Windhoek River Olympia – Corner of Frankie Fredericks and Jason Hamutenya Ndadi Streets Corner of Monte Christo and Otjomuise Roads
Informal Sector Forum	<ul style="list-style-type: none"> Establishment of an Informal sector forum
Informal Sector Incubation	<ul style="list-style-type: none"> Participation of the informal sector at the Local Economic Development and Investment Forum
Improved Wi-Fi Connectivity	<ul style="list-style-type: none"> Develop an informal sector incubation centre
Partner with the Informal Sector	<ul style="list-style-type: none"> Roll out Wi-Fi hotspots in informal trading markets Partner with the informal sector, through stakeholder engagements and forums, to address the need for: <ul style="list-style-type: none"> Business support Entrepreneurship support and mentorship Access to funding and/or financing
Reduce Red Tape	<ul style="list-style-type: none"> Review permit processes Develop e-systems for permits: <ul style="list-style-type: none"> Liquor licence To sell food licence

4.5.9. High-Level Bulk Infrastructure Assessment

4.5.9.1. Transportation Infrastructure Assessment

From a transportation infrastructure perspective, and in line with the spatial analysis under heading 4.5.10 below, there is a need to keep locality decisions of traders in consideration during planning and development stages of upgrading the informal cluster markets.

The needs include amongst others public transport facilities/nodes, proper non-motorised transport infrastructure, shared goods receiving areas with sufficient spatial provision for accepting at least single unit trucks with ease for receiving items such as fresh produce from local farmers.

4.5.10. Spatial Analysis

From a spatial perspective, it is also important to consider the locality decisions made by informal traders themselves. There is a need to be sensitive to the locality decisions and preferences of MSME activities rather use and support those decisions because they generally understand their markets and its preferences better. Good examples of these are fourways in the Big Bend/Havana/Goreangab area, Eveline Street, Green Mountain Dam road in Goreangab and the more recent vegetable market on Nelson Mandela road.

The above locality decisions generally work for the traders and is located where they themselves think they would find the most clients. However, it also brings difficulty in the sense that their produce must be transported to the trading site and back every day. Therefore, ways should be explored to assist traders with facilities where they can store their goods.

4.5.11. Strategic Intervention Outcomes

Table 4-16 illustrates the outcomes of the Informal Sector strategic interventions, programmes, and projects.

Table 4-16: Strategic Intervention Outcome for the Informal Sector

Indicator	Rating	Comment
Informal Sector Employment		By providing support and promotion of the informal sector, those unemployed or currently not economically active may resume seeking opportunities in the sector. Low and unskilled individuals may also increase their employment and income levels through the promotion of the sector. This will exhibit an overall reduction in current unemployment rates.
Population Growth		No change.
Informal Sector GVA		While there is currently no data available on GVA for the informal sector, through engagements via forums and various platforms, there can be increased access to knowledge and data on the sector. However, with a strong focus on informal sector support, GVA is expected to increase as a result of increasing business activity.
Informal Sector Importance to CoW		The informal sector plays a key role in stimulating economic development and creates employment opportunities for those looking for work or unemployed. The informal sector will remain a key economic driver in the City.
Informal Sector GVA Growth		The national trade sector GVA growth was about 8.63% p.a. between 2011 and 2016. There is currently a lack of data available to measure the performance of the informal sector. However, GVA is expected to increase.
Informal Trading Market Areas and Zones		Informal trade will become more sustainable for business owners, increasing the overall effect on employment and income levels. The informal sector will also experience increased foot traffic for the general public as well as tourists.
Product Diversity		Through collaboration between the City and informal traders, the variety of goods and services offered from the informal sector will increase and boost market attractiveness.

Indicator	Rating	Comment
Informal Trading Licenses and Permits		Improved management and regulation of informal businesses, especially those that sell food and meat products. Licenced informal traders will also be in a better position to benefit from infrastructure and facility developments by the City.
Crime and Safety		Reduced crime and improved safety will entice tourists and the general public to shop and visit the informal market areas and zones. Tourists will also have a sense of safety when visiting tourist attractions.
Stakeholder Engagement		An informal sector forum will enable the City to partner with the informal sector.
Infrastructure and Facilities		Informal traders will be able to operate in a more conducive environment for business activities.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.6. Strategic Intervention: Social Development

4.6.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to become a caring city by addressing the social needs of those who reside in it.

4.6.2. Factors that Influence Social Development

Figure 17 and Table 4-17 illustrate several factors that influence the market attractiveness for social development in CoW.

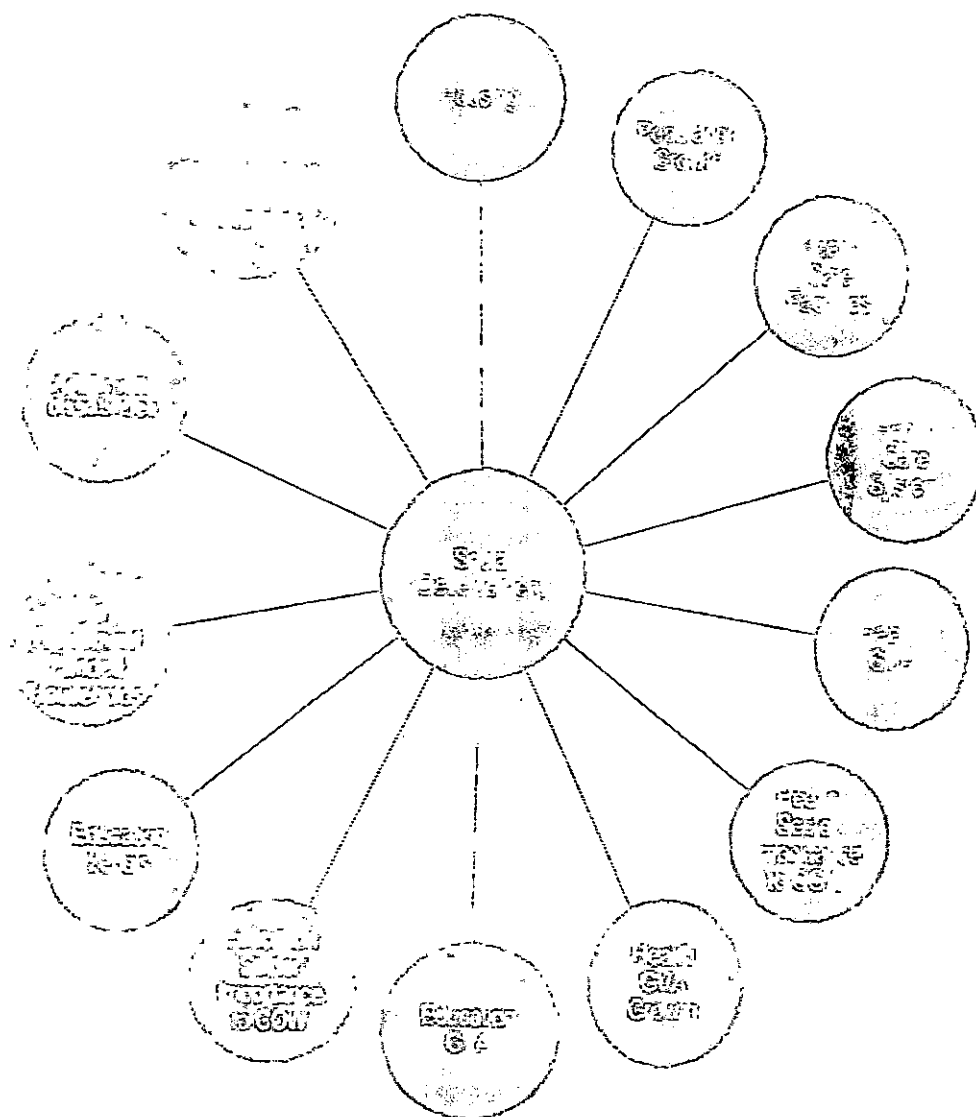


Figure 17: Factors Influencing Social Development

Table 4-17: Factors Influencing Social Development

Indicator	Rating	Comment
Housing		Some 31% (or about 41,459) of households lived in Improvised Housing in 2018. It is estimated that an additional 50,000 to 60,000 housing units will be required by 2030.
Population Growth		The Khomas Population Growth Rate is about 3.59% p.a. At this rate, the Khomas population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030.
Health Care Facilities and System		Windhoek has the largest concentration of public hospitals and clinics and serves and acts as the main healthcare hub in the country. People bypass the primary care system (clinics) and go directly to one of the hospitals, creating pressure on this component of the healthcare system. The Ministry of Health and Social Services has plans to construct a new hospital towards the west of the city. The Ministry of Health and Social Services acknowledges that there is a general lack of other types of health care services such as mental health institutions, old age care, etc.
Health GVA		Health GVA in Khomas was about N\$2,001.13 million in 2011. Khomas contributed an estimated 74.95% of the national health GVA.
Health Sector Importance to CoW		The health sector in Khomas contributed about 7.37% of total GVA in Khomas in 2011.
Health GVA Growth		The national health sector GVA growth was about 10.41% p.a. between 2011 and 2016.
Education GVA		Education GVA in Khomas was about N\$2,236.19 million in 2011. Khomas contributed an estimated 32.46% of the national health GVA.
Education Sector Importance to CoW		The education sector in Khomas contributed about 8.24% of total GVA in Khomas in 2011. CoW is the centre for tertiary education for Namibia.
Education GVA Growth		The national education sector GVA growth was about 5.09% p.a. between 2011 and 2016.
Education Levels		Of all adults over 15 years of age, about 22.6% of the National population has completed secondary education, while an additional 8% has completed tertiary education. Since CoW is the centre for tertiary education for Namibia, the city has more educated and skilled workers than the rest of the country.
Pension and Retirement Funded Households		About 10.2% of all household income in Namibia is derived from a state pension and an additional 1.3% from a private pension in 2016. In Khomas, only 3.4% of households derive their income from a state pension and 3.4% from an old age pension in 2016.
Adults with Disabilities Funded Households		About 0.8% of all household income in Namibia is derived from a disability grant for adults over 16, compared to 0.2% in Khomas in 2016.
State Child Maintenance Grants Funded Households		About 0.7% of all household income in Namibia is derived from child maintenance or orphan's grant in 2016, compared to 0.2% in Khomas.

Note! Colour coding is used to indicate the status quo of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.6.3. Introduction

As stipulated in the vision of CoW, the City wishes to become a smart and caring city by 2022. As such, the social development of the residents in Windhoek remains a key mandate of CoW. It is therefore important to identify potential development initiatives that the private and public sector can invest in that will also uplift the local community. Emphasis should be placed on the vulnerable segments of the community, such as the homeless, youth, aged, and the sick.

4.6.4. Housing

Some 31% (or about 41,459) of households in Windhoek already live in improvised housing in 2018. Based on current population growth rates of about 3.59% p.a., it is estimated that an additional 50,000 to 60,000 housing units or a total of about 100,000 housing opportunities will be required by 2030.

Over the past few years, considerable changes have taken place in the housing landscape of Windhoek. The land delivery process has improved and increased over the last couple of years. However, efforts should be increased to eliminate and meet the present demand.

A healthy workforce is a crucial element of a productive workforce. As such, proper healthcare is a concern for both economic development and social upliftment. The Ministry of Health and Social Services indicated that many people in Namibia are reliant on state institutions, such as public hospitals and clinics, for health and social services.

Windhoek has the largest concentration of public hospitals and clinics and serves and acts as the main healthcare hub in the country. The healthcare system is supposed to work on the principle that a patient will first go to a primary healthcare facility (i.e. a clinic), before being referred to a secondary healthcare facility (i.e. hospital) and tertiary healthcare facility (i.e. specialist). In Windhoek, the system is bypassed by patients who go directly to the hospital for healthcare needs, placing additional strain on this segment of the healthcare system.

The Ministry of Health and Social Services intends to alleviate the pressure on secondary healthcare services by constructing a new hospital towards the west of the City. This provides CoW with the opportunity to achieve several strategic goals such as improved healthcare, as well as developing support structures for other vulnerable groups.

It is proposed that a precinct approach to social development will be ideal. Facilitate the development of a health precinct that incorporates several social support structures. The precinct should include a clinic, hospital, training college for nurses, housing for nurses and students, shelter for the homeless, a soup kitchen, a hospice, place of safety for women and children, school (with hostel) and training facility for the physical and mentally handicapped, mental healthcare, treatment and rehabilitation centre, and a psychiatric institution. In addition, furthermore facilitate the development of a retirement precinct, which either forms part, or is in close proximity to the Health precinct. The retirement precinct must include low-cost retirement rental units for assisted living, dependent living, and frail care that cater for people who cannot afford to retire. Figure 18 illustrates the health precinct concept.

4.6.6. Retirement

Based on pension and retirement-funded household data and interviews (source), it can be inferred that many people cannot afford to retire in the City. To cater for the elderly, a retirement precinct is proposed. A retirement precinct would focus on developing an area with a mixture of residential and commercial options with special focus on those who are retired or about to retire. The precinct will be designed to allow residents to maximise life and their independence, while ensuring that they are cared for when in need.

The elderly life stages, the needs of the elderly are more than just a place to stay. Developing a retirement precinct needs to address all aspects of the person's life, including a full range of housing options, facilities and services.

The CoW Retirement Precinct will allow one or several property developers to invest in a specific area that is focused on delivering a product set that will be appealing to the retirement market. By planning the precinct with various stakeholders including government, property developers and residents, the final CoW Retirement Precinct Plan will create an environment that is desirable by the retirement community. At the same time, the precinct should cater for the elderly who cannot afford to retire by providing a set of low-cost rental retirement units that includes assisted living, dependent living and frail care units. For example, developers to indicate how and how many low-cost units they will include in their developments. i.e. use the same concept utilised during the Cape Town' Foreshore Freeway Precinct proposals. The retirement precinct concept is illustrated in Figure 18.

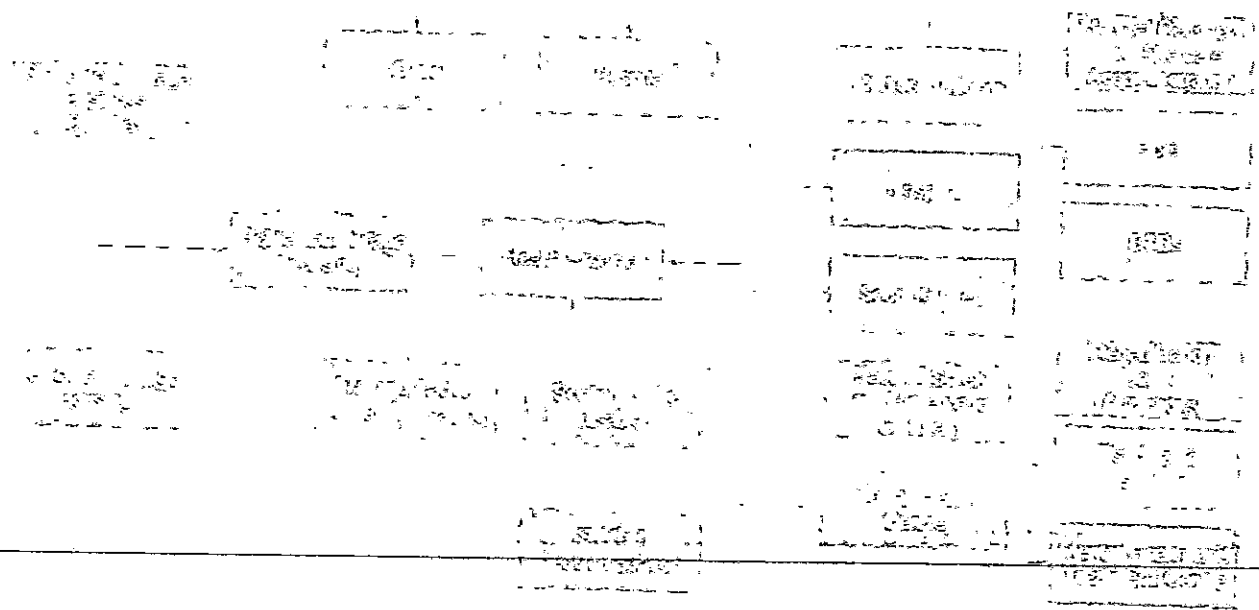


Figure 18: Potential Health and Retirement Precinct Development Concept

4.6.7. Education

Windhoek as the capital of Namibia is privileged to have access to good tertiary education options within the boundaries of the City. On a national level, the Namibian Training Authority (NTA) oversees accreditation to ensure a uniform standard.

Below a summary of tertiary education institutions with an indication of their academic programmes:

4.6.7.1. Tertiary:

University of Namibia (UNAM):

♦ Faculties:

- Faculty of Agriculture & Natural Resources
- Faculty of Economic & Management Science
- Faculty of Engineering & Information Technology
- Faculty of Humanities & Social Science
- Faculty of Namibian Business School
- School of Dentistry
- School of Medicine
- Faculty of Science
- Faculty of Education

- Faculty of Law
- School of Nursing
- School of Pharmacy
- School of Public Health
- Over and above there is also the following centers:
- Centre for Postgraduate Studies
- Centre for Open Distance & eLearning
- Centre for Professional Development, Teaching and Learning Improvement
- Centre for Quality Assurance and Management
- Centre for Human Rights and Documentation Centre
- Centre for Industry and Cooperative Education Unit
- Centre for Strategic and Physical Planning Unit
- Campuses: (with in study area)
- Main Campus
- Neudamm Campus
- Khomasdal Campus
- Hage Geingob Campus

Namibia University of Science and Technology (NUST):

◇ Faculties:

- Faculty of Computing and Informatics
- Faculty of Engineering
- Faculty of Health and Applied Sciences
- Faculty of Human Sciences
- Faculty of Management Sciences
- Faculty of Natural Resources and Spatial Sciences

◇ Over and above there is also:

- Harold Pupkewitz Graduate School of Business
- Centre of Open and Lifelong Learning
- Cooperative Education Unit
- Centre for Enterprise Development
- Programme Development Unit
- Innovation Design Lab
- Namibia Business Innovation Institute
- Namibian-German Centre for Logistics

Other tertiary institutions in the study area

- ◇ International University of Management (IUM) – Windhoek:
 - Programs: Bachelor and Master Programs in Strategic Management Information Technology, Human resources, Travel, Tourism, and Hospitality, Business Information Systems, Business Administration, Finance Management, HIV/Aids Management and other subjects.
- ◇ Windhoek Vocational Training Centre, Windhoek, Khomas Region
- ◇ Institute for Domestic Science & Agriculture in Baumgartsbrunn.

4.6.8. Precinct Development Approach

The health and retirement precincts should form part of several precincts that should be developed in CoW. These precincts will act as key transport nodes and areas where densification should take place. Corridors between key nodes need to be identified to create high density housing precincts with various housing options, ranging from serviced land and low-cost housing to hostels, retirement homes and apartment buildings while re-thinking town planning issues such as density, mixed land use, parking and bulk provisions.

4.6.9. Social Development Programmes and Projects

Table 4-18 provides a summary of the MSME programmes and projects.

Table 4-18: Social Development Programmes and Projects

Programmes	Projects
Housing	<ul style="list-style-type: none"> ○ Densification of Housing Precincts ○ Identify available land for development ○ Re-activate an integrated erf development and servicing programme ○ Low-Cost Municipal Rental Housing ○ Repurposing under-utilised buildings ○ Encourage private sector involvement in below-entry-level housing market (Ex. Re-think density, mixed land-use and bulk)
Health and Care Precinct	<ul style="list-style-type: none"> ○ Hospital ○ Health Care Precinct <ul style="list-style-type: none"> ○ Clinic ○ Training college for nurses ○ Housing for nurses and students ○ Shelter for the homeless ○ Soup kitchen ○ Hospice ○ Place of safety for women and children ○ School (with hostel) for the physically and mentally handicapped ○ Training facility for the physically and mentally handicapped ○ Mental healthcare, treatment and rehabilitation centre ○ Psychiatric institution
Retirement Precinct	<ul style="list-style-type: none"> ○ Retirement Village <ul style="list-style-type: none"> ○ Self-care housing units ○ Assisted living units ○ Dependent living units ○ Frail care units ○ Low-cost retirement units

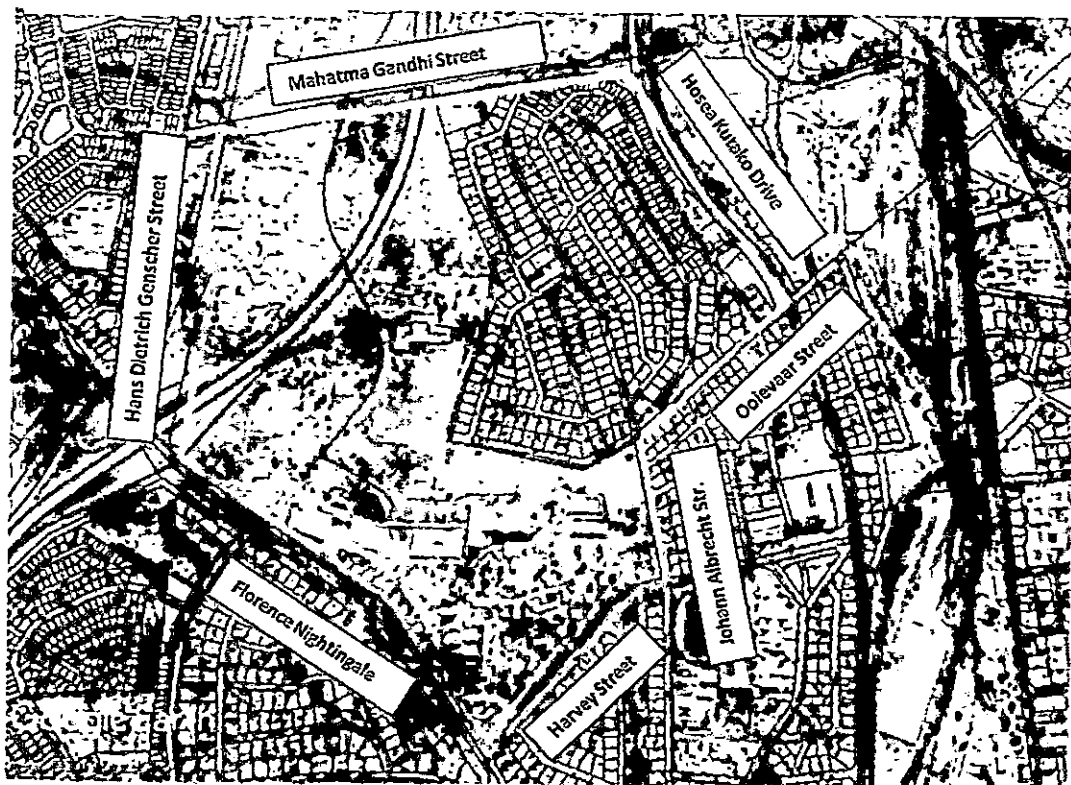
4.6.10.1. Health Precinct

The recommendation to enable or guide the establishment of a health precinct with a wide variety of related services and facilities requires the City to identify the best locality for such a precinct. It must then develop and institute policies that will enable both the private and the public sector care institutions to work together to achieve the proposed precinct development with all its related facilities.

There are already such precincts in the City. The Eros Park MediCity was developed many years ago, but over the years it drew medical practitioners, specialists, specialist units, more hospitals and retirement facilities into the area. Today, it can be regarded as such a medical or health services precinct. The same could be said for Lady Pohamba Hospital and its surrounding support services. It would be ideal to have the precincts in all parts of town to cater for different neighbourhoods.

However, both of these are private in nature and cater for the higher end of the market. It is necessary to design measures whereby similar development can occur over time in a policy area that will eventually be able to become this health precinct for all and not only the rich.

The area shown in the map below can be used as such a policy zone where more and more health-related functions, professionals and specialist services can be encouraged to develop and grow. It includes the State Hospital, its nurses' quarters, offices for the Ministry of Health and Social Services, the Rhino Park day hospital, a psychological specialist, various medical and dental practitioners, etc. It also includes the UNAM Academic Hospital and teaching facility. The residential houses in this policy zone will, over time, be allowed to re-zone and re-purpose to provide for other facilities such as retirement and old age care facilities and more specialist units.



Map 8: Proposed Health Precinct Policy Area

The City is faced with numerous developmental challenges of which housing is one of them. The current housing backlog includes an estimation of more than 40 000 households residing in the informal settlements. This is in addition to annual in-migration which is expected in the City with 50 000 – 60 000 households to move to the City by 2030.

Plans are being implemented to formalise the informal settlements by providing individual erven. However, this is a long term and ongoing plan that is being implemented to curb the further spread of the informal settlements. The Structure Development Framework will guide future developments in and around the City. The Structure Development Framework will address land use concerns in an integrated manner.

4.6.11. High-Level Bulk Infrastructure Assessment

4.6.11.1. Transportation Infrastructure Assessment

The Health Precinct Area is divided by the Western Bypass and to the west Hans Dietrich Genscher Street, Florence Nightingale arterial to the south, Hosea Kutako Drive, Havey, Johann Aldrecht & Ooievaar streets to the east and Mahatma Gandhi arterial to the north, with Bach Street passing through the middle of the area acting as a dedicated exclusive high mobility link between the Windhoek Central State Hospital and the Katutura State Hospital. The well developed arterial roads all around is sufficient to cope with the transformation of the area into the anticipated health precinct area unless major densification occurs. The future planned extension of Nelson Mandela Road from Independence Avenue to link with Harvey Street leading to Hendrik Witbooi Street will further enhance the accessibility of the precinct.

With regards to housing, the anticipated rapid growth of Windhoek will require densification which will place further burden on the current road network and will require current transport planning to be enhanced to ensure that provisions made for is in line with actual growth within the City.

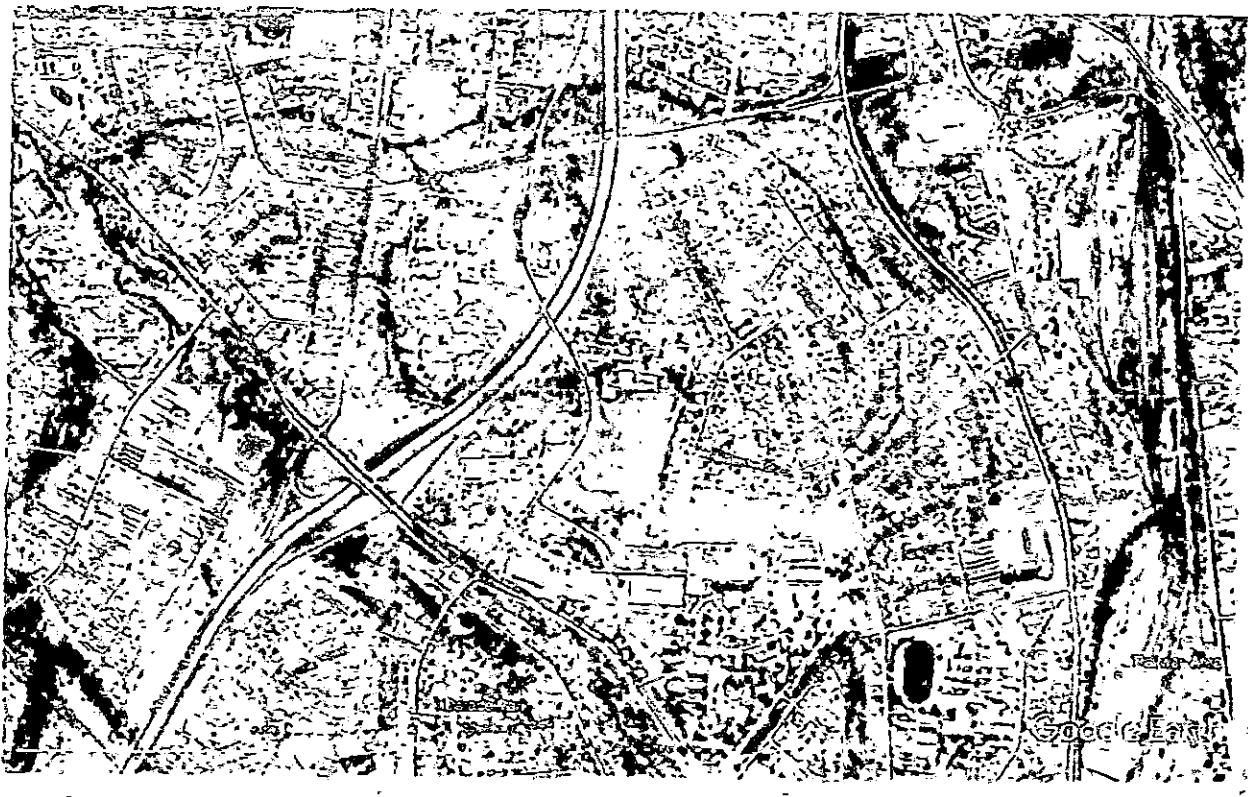
The possibility of unlocking land in Proper is provided by the powerline reserve which is ideal for a high density housing precinct development. Should it be possible to move the powerline, its reserve can be rezoned; however it will place a major burden on the current road network system as the related traffic impact is not catered for in the current roads master plan.

With the forecasted influx and growth of CoW's population, it is imperative that the implementation of the CoW's roads masterplan receives priority and financial backing to avoid falling further behind its implementation schedule.

4.6.11.2. Water and Sanitation Infrastructure Assessment

The Health Precinct Area indicated in Map 8 above, is supplied by water from two pressure zones, namely Low Level Reservoir on the eastern side of the Western Bypass, and Western Reservoir on the western side of the Western Bypass. This area is well developed in terms of water distribution and reticulation infrastructure, and no significant shortcomings were identified in the Bulk Water Masterplan.

The aerial layout below shows the roads along which water pipelines of 160mm or larger diameter are located and in theory will have more capacity to accommodate developments with higher water demand. The precinct areas should receive priority in the identified areas in terms of water distribution.



Map 9: Roads along which water pipelines of 160mm or larger diameter are located

From a bulk water and sanitation perspective extensive infrastructure development will be required to accommodate the housing backlog including water storage, supply, wastewater conveyance and treatment. The existing municipal bulk infrastructure networks are nearing or already exceeding their capacity, and it is imperative that the spatial and infrastructure planning going forward complement each other.

The key constraint is shortage in supply of potable water from the three dam system by NamWater as a result of prolonged drought seasons, bearing in mind that the aquifer supply is not unlimited and the actual yield is still theoretically determined and that by implementation of effective water demand management to meet the current drought safe yields. The reclamation is also affected as a result of low inflow into the Gammams Waste Water Treatment Plant (GWWTP) that supplies the reclamation plants, although alternative supply source to the reclamation plant can be considered, i.e. Otjomuise Waste Water Treatment Plant (OWWTP).

As for immediate planned projects that may possibly materialise, is the Upgrade and Extension of GWWTP by 35ML/day and the addition of a new Reclamation Plant that will augment the supply capacity in droughts and augment the demand in normal seasons.

During regular potable supply conditions, the capacity of the GWWTP is constraint as it is being operated over capacity during this times and an upgrade is needed to cater for additional influent associated with economic development. (City of Windhoek Bulk Water: Husselman, S; Theron, J J; Adams, R)

4.6.11.3. Electricity Infrastructure Assessment

The Health Precinct Area will get their mains supply from either Katutura Hospital Local Distribution Station (DS) fed from Eros Load Centre (LC), or Johan Albrecht 1 DS fed from CBD LC. It is forecasted in the latest electricity masterplan that Eros LC's firm capacity of 20MVA will be exceeded by the maximum demand by 2019.

4.6.11.4. Information & Communications Technology Assessment

The telecommunication distribution network throughout the City is easily and effectively accessible. This is true for high capacity fibre-optic networks as well as cellular- and data networks. The roll-out of 5G technology in the near future will add unprecedented advantages in the communication field.

4.6.12. Strategic Intervention Outcomes

Table 4-19 illustrates the outcomes of the social development strategic interventions, programmes and projects.

Table 4-19: Strategic Intervention Outcome for Social Development

Indicator	Rating	Comment
Housing		More housing opportunities will be available near economic opportunities.
Population Growth		No Change
Health Care Facilities and System		Windhoek health system, especially its social services, will improve significantly.
Health GVA		Health GVA in Khomas Region will increase.
Health Sector Importance to CoW		The Health services sector is already an important sector in Windhoek and will continue to be an important sector in CoW
Health GVA Growth		The Health services sector is already an important growth sector in Windhoek and will continue to be an important growth sector in CoW
Education GVA		No Change
Education Sector Importance to CoW		No Change
Education GVA Growth		No Change
Education Levels		No Change
Pension- and Retirement-Funded Households		More people will be able to afford to retire in Windhoek.
Adults with Disabilities Funded Households		More adults with disabilities will be cared for in Windhoek.
State Child Maintenance Grants-Funded Households		No Change

Note! Colour coding is used to indicate the anticipated status of an indicator in context of economic, social, environmental, infrastructure and policy/institutional long-term sustainability, after all proposed interventions had been implemented. The ratings are:

Grey = Neutral; **Red** = Poor; **Yellow** = Average; **Green** = Good

4.7. Strategic Intervention: Create an Enabling Environment

4.7.1. Objective of the Strategic Intervention

The objective of this strategic intervention is to improve the enabling environment to encourage economic development and investment in Windhoek.

This strategic intervention represents cross-cutting activities that had already been included in the other strategic interventions. In this strategic intervention, these activities are reviewed from a holistic perspective.

4.7.2. Introduction

Local government is the sphere of government closest to local business and communities. It is therefore a municipality's task to ensure that growth and development takes place within its area.

In context of local economic development, the main role of the municipality is to create the enabling environment for investment to take place. This implies that:

- ◇ The local government take a developmental approach, especially in connection with socio-economic development within the area.
- ◇ The spheres of government, namely local, regional and national government need to work hand-in-hand with each other to ensure that investment can take place. This implies improved integration and co-operation between local government, and regional and national ministries and other stakeholders. It must strive to avoid duplicating tasks and focus on establishing complementary roles for all stakeholders.
- ◇ From an investment perspective, local government must:
 - Foster and promote participatory citizenship and facilitate partnerships.
 - Conduct integrated development planning.
 - Ensure investor-friendly policy is in place with fixed guarantees on investment-related matters.
 - Broaden its tax base through the provision of basic bulk services and other infrastructure services.
 - Maintain local government assets and infrastructure.
 - Conduct spatial planning including zoning of various land uses.
 - Analyse the local economy and develop detailed plans for interventions.
 - Investigate local resources.
 - Investigate local comparative advantages
 - Ensure that there is land available for development.
 - Develop local skills and capacity.
 - Investigate export opportunities for local produce and products.
 - Reduce red tape by creating and streamlining processes relating to investment.
 - Develop internal capacity to engage the investment community.
 - Increase brand recognition and awareness of the area and its products.
 - Disseminate information and promote investment opportunities.
 - Implement sustainable community projects.

4.7.3. Local Economic Development and Investment Platforms

It is the responsibility of all spheres of local government that an 'investment-ready' environment is created, while utilising its resources as efficiently as possible. A **Windhoek Economic Development and Investment Forum** should be established with a focus to bring together all economic development partners, including all spheres of government, business chambers, universities and skills training institutions, existing business and potential investors, etc. to:

- ◇ Identify investment opportunity or to improve the local economic and investment environment.
- ◇ Identify role-players to develop opportunities.
- ◇ Develop high level agreements amongst forum members on who should develop various components of the investment opportunity.
- ◇ Coordinate and get feedback on efforts made by all different investment partners.

Economic development partners must strive to reduce red tape to investment, implement appropriate bulk services at investment land sites, develop the right local skills to ensure that the area has a workforce that match with the skills required, and identify new market opportunities for produce cultivated and products manufactured in Windhoek.

4.7.4. CoW Branding and Marketing Promotion

Currently, CoW does not have a brand plan or an integrated marketing communication plan. At corporate level, CoW's vision is to become a SMART and Caring City. It is imperative that CoW develop a brand plan at corporate

level in line with this vision to guide all marketing efforts⁴⁵⁶

CoW needs to develop an integrated marketing communication plan to promote development opportunities within CoW. From an economic development perspective, CoW has several key comparative advantages that can be leveraged, including, but not limited to:

- ◇ Windhoek is the **administrative centre of the country** and has a high number and proportion of government service employees.
- ◇ Windhoek is the **academic centre of Namibia**. Windhoek has many academic institutions, including the University and Vocation Training Cluster (UNAM, NUST (PoN), IMU) and has the highest number and proportion of students and tertiary educated employees.
- ◇ Windhoek is the **economic centre of Namibia** with most major businesses having their headquarters or regional offices located in the city.
- ◇ Windhoek is the **biggest market** in Namibia based on population numbers. It is estimated that in 2018 between 415,074 and 416,997 lived in CoW. This means about 1 out of every 6 Namibians live in Windhoek.
- ◇ Khomas has the highest increase in population density in Namibia at 3.59% p.a. This means that, based on population, **CoW is the fastest growing market** in Namibia. If the current population growth rate persists, then between 626,229 and 636,416 will live in Windhoek by 2030.
- ◇ The largest share of households in Khomas received their income through wages and salaries (72.7%). This is an indication that CoW has a **higher personal income** than the rest of Namibia, where reliance on the state for income is more prevalent. Based on the household assets owned, households in Khomas are better off than households in the rest of Namibia since they proportionately can afford to own more goods such as radios (74.1%), televisions (62.7%), telephones (fixed and mobile) (17.8% and 74.9%), computers (including laptops) (35.6%) and home internet connectivity (15.3%).
- ◇ Khomas has a **large proportion of entrepreneurs** with about 14.1% of households receiving their income through business activity that is unrelated to farming.
- ◇ Khomas has the **largest labour force in Namibia** at about 233,707 in 2016 and the second highest labour force participation rate at 79.04% after Erongo.
- ◇ CoW has several **public and private hospitals**, including Windhoek Central Hospital, Katutura Hospital, Windhoek MediClinic, Roman Catholic Hospital, etc.
- ◇ CoW has **good policy in place** that allows for establishing special vehicles for development. These include CoW Public Private Partnership Policy, Special Projects Policy. According to the CoW Public Private Partnership Policy, PPPs may be entered to **fast-track certain types of projects**, including:
 - Bulk Public Infrastructure - the fixed assets, networks, and facilities needed for the operation of the society and economy:
 - Electricity
 - Water and sanitation
 - Transport fixed assets—roads, sewer, bridges, railroads, ports, airports—and public systems such as bus networks and urban train services
 - Telecommunication networks—local loop, exchanges, and backbone
 - Business support assets such as industrial parks or irrigation systems
 - Utility services such as potable water, improved sanitation, street lighting and solid waste disposal
 - Health facilities
 - Municipal infrastructure and services - the fixed assets, networks, and facilities needed for the operation of a municipality:
 - Municipal accommodation—physical buildings from which municipal services are provided, such as offices, etc.
 - Meter reading and billing services
 - Municipal networks such as telephone or IT hardware – where the systems are not

subject to rapid technological change

- Housing and related services
- Recreational facilities such as parks and sport stadiums
- Public transport

◇ Significant **sectoral comparative advantages** in:

- Manufacturing - Comparative scale advantage over rest of Namibia and the sector's importance to Khomas.
- Construction - Comparative scale advantage over the rest of Namibia. Nationally, the industry had seen significant growth between 2011 and 2016.
- Transport and communication - Comparative scale advantage over rest of Namibia. Nationally, the industry had seen significant growth between 2011 and 2016.
- Finance intermediation - Comparative scale advantage over rest of Namibia and the sector's importance to Khomas. Nationally, the industry had seen significant growth between 2011 and 2016.
- Public administration and defence - Comparative scale advantage over the rest of Namibia and the sector's importance to Khomas.
- Education - Comparative scale advantage over the rest of Namibia and the sector's importance to Khomas.
- Health - Comparative scale advantage over the rest of Namibia and the sector's importance to Khomas. Nationally, the industry had seen significant growth between 2011 and 2016.
- Tourism – About 29% of all international tourists enter Namibia using air transport, of which the most enter Namibia through the Hosea Kutako International Airport located in CoW.

It must be noted that there is an impasse on the CoW Public Private Partnership Policy since the regulations of the act has not yet been promulgated.

Overall, CoW is the most sustainable City within Namibia. CoW's marketing promotion should therefore focus on how the city will develop into a SMART and Caring City, while emphasising how the City is at the forefront of delivering a number of game-changer projects that will see the region become a hub for economic development, innovation and entrepreneurship, along with spatial justice and a lifestyle for all to enjoy.

4.7.5. Buy-in

The most crucial part of this strategy is to get buy-in from Council and all department heads. Economic development is not an activity that can be performed by one person or one department. Economic development cuts across all departments and requires inputs from most departments.

5. WED Implementation Plan and Monitoring and Evaluation Framework

5.1. Budget Responsibility

Implementation is inevitably linked to budgets. For this study, funding for each project may be supplied by four sources:

- ♦ **Dept. Lead Product** – The Department of Economic Development and Community Services is responsible to lead and fund the project.
- ♦ **CoW Lead Project** – Another department is responsible to lead and fund the project.
- ♦ **Promote and Support Private or Public Sector Project** – The project is something that is being proposed for the development of the area. The project therefore needs to be promoted to the private or public sector for implementation and needs to take ownership and responsibility to lead and fund the project. CoW may contribute by promoting the project, providing funding, infrastructure, zoning or incentives.
- ♦ **Support Existing Private or Public Sector Initiative** – The project is a private or public sector initiative that may need support by providing funding, infrastructure, zoning or incentives.

Table 5-1 to Table 5-5 provide a breakdown on who should lead and fund each of the projects identified within this strategy.

Table 5-1: Budget Responsibility for Agriculture and Agro-Processing Projects

Programmes	Projects	Dept. Lead Project	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Increase Water Recovery	<ul style="list-style-type: none"> • Increase non-potable water recovery for agricultural use 				
Access to Farmland	<ul style="list-style-type: none"> • Boreholes • Review farmland access and availability in CoW • Identify municipal farmland close to existing CoW non-potable water infrastructure for aquaponics and hydroponic farming 				
Increase water supply to selected farmland	<ul style="list-style-type: none"> • Water pipeline for potable and/or non-potable water between water plant and cluster of farms. 				
Increase Agriculture Stakeholder	<ul style="list-style-type: none"> • Schedule agriculture and agro-processing sessions as a regular feature in the Economic Development and Investment Forum (see section 4.6.9) • Partner with agriculture and agro-processing stakeholders such as existing commercial farmers, academic institutions to improve agricultural produce production (genetics, technology, methods, etc.) within CoW 				
Increase Agricultural Produce (crops, organic and livestock)	<ul style="list-style-type: none"> • Conduct an Agriculture Cultivation and Agro-Processing Strategy study to identify the best crops, freshwater fish and livestock options for CoW. • Support aquaponics and hydroponic farmers: <ul style="list-style-type: none"> ◦ Rent available agricultural land to aquaponics and hydroponic farmers ◦ Supply these farms with non-potable water infrastructure • Increase livestock (egg/layer and pig) production <ul style="list-style-type: none"> ◦ Rent available CoW-owned agricultural land to livestock farmers. ◦ Ensure that these farms have the required water rights ◦ Supply these farms with water infrastructure (e.g. boreholes) to ensure water suitable for livestock production • Support organic agriculture produce production • Support household agriculture/roof gardening, etc. 				

Value Chain Development of Agricultural Produce	<ul style="list-style-type: none"> Develop Agricultural Produce Value Chains <ul style="list-style-type: none"> Conduct market value chain studies (local and export supply and demand studies) for all selected crops Identify potential agro-processing investment opportunities Identify potential agro-processing investors 	
Agro-Processing	<ul style="list-style-type: none"> Support the development of the existing Fresh Produce Market 	

Table 5-2: Budget Responsibility for Transport and Logistics Projects

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Logistics Support Structures	<ul style="list-style-type: none"> Develop Logistics Hub such as truck stop, rail yards, air cargo and piggyback infrastructure Rail Support Services such as rolling stock maintenance yard and marshalling yards Warehousing 				
Local Public Transport	<ul style="list-style-type: none"> Review of Transport Plan (together with Spatial Development Framework) <ul style="list-style-type: none"> Transport node developments Transport route developments Airport-tourist hub bus route Licensing of private sector operators in tourist areas 				
Implement Non-Motorised Transport Plan	<ul style="list-style-type: none"> Implement Non-Motorised Transport Plan <ul style="list-style-type: none"> Pedestrian walkways Cycling lanes 				

Table 5-3: Budget Responsibility for Tourism Projects

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Tourism Attraction Development	<ul style="list-style-type: none"> Circular Walkable Tourist Route <ul style="list-style-type: none"> Develop circular walkable routes (with Route Markers) Employ qualified tour guides Develop a tour guide app (GPS prompts) Upgrade and develop tourist attractions (with attraction custodians) Transfer custodianship of attraction to CoW if required Riverwalk Development <ul style="list-style-type: none"> Theatre Boutique retail Hotels Restaurants Entertainment area 				
Tourism Zoning	<ul style="list-style-type: none"> Develop tourist transport between tourist attractions 				
Tourism Grading and Marketing	<ul style="list-style-type: none"> Rezone businesses in tourism areas Promote tourism grading 				

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<ul style="list-style-type: none"> o Tourism Destination Marketing - Update CoW website's tourism section (or create a CoW tourism website) <ul style="list-style-type: none"> o Create interactive content for the website (text, images, videos) <ul style="list-style-type: none"> ▪ Walkable routes ▪ CoW tourist attractions ▪ Events ▪ Accommodation ▪ Restaurants o Search Engine Optimisation o Review Tourism Signage o Relocate Tourism Information Centre 				
Tourism skills training	<ul style="list-style-type: none"> o Basic tourism skills short courses, e.g. food preparation, receptionist training, housekeeping, etc. 				

Table 5-4: Budget Responsibility for MSME Projects

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Local Forums	<ul style="list-style-type: none"> o WED and Investment Forum 				
Localisation	<ul style="list-style-type: none"> o Create or support a 'Buy Windhoek' programme o Local procurement should be prioritised by CoW's supply chain. 				
MSME Support and Promotion	<ul style="list-style-type: none"> o Include a MSME support desk inside the Business Development / Investor Liaison Desk <ul style="list-style-type: none"> o Assist small business to apply for national incentives. o Assist small business with marketing and promotion o Business Directory o Assist with Business Email and Websites 				
Informal Trade Support	<ul style="list-style-type: none"> o Develop levels of incubation centres o Upgrade selected informal markets o Develop public facilities near informal markets 				
Improved Wi-Fi Connectivity	<ul style="list-style-type: none"> o Roll out Wi-Fi hotspots 				
Partner with MSME Development Agencies	<ul style="list-style-type: none"> o Partner with Development agencies such as NCCI Windhoek Branch, NUST, etc. on: <ul style="list-style-type: none"> o Research and Development o Entrepreneurship and Incubation o Innovation Marketplace o Marketing and Promotion 				
Reduce Red Tape	<ul style="list-style-type: none"> o Review permit processes o Develop e-systems for the following processes: <ul style="list-style-type: none"> o Dealing with Construction Permits o Getting Electricity o Registering Property o Develop e-systems for permits: <ul style="list-style-type: none"> o Liquor license o To sell food licence 				

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Export Development	<ul style="list-style-type: none"> Develop an Export Strategy <ul style="list-style-type: none"> Identify local businesses that produce products that could potentially be exported Identify potential markets for locally produced products, including leather, cosmetics, etc. 				

Table 5-5: Budget Responsibility for Social Development Projects

Programmes	Projects	Dept. Lead Product	CoW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Housing	<ul style="list-style-type: none"> Densification of Housing Precincts <ul style="list-style-type: none"> Identify available land for development Re-activate an integrated erf development and servicing programme Low-Cost Municipal Rental Housing Repurposing under-utilised buildings Encourage private sector involvement in below entry-level housing market 				
Health and Care Precinct	<ul style="list-style-type: none"> Hospital Health Care Precinct <ul style="list-style-type: none"> Clinic Training college for nurses Housing for nurses and students Shelter for the homeless Soup kitchen Hospice Place of safety for women and children School (with hostel) for the physical and mentally handicapped Training facility for the physical and mentally handicapped Mental healthcare, treatment and rehabilitation centre Psychiatric institution 				
Retirement Precinct	<ul style="list-style-type: none"> Retirement Village <ul style="list-style-type: none"> Self-care housing units Assisted living units Dependent living units Frail care units Low cost retirement units 				

5.2. Department of Economic Development and Community Services Project Key Performance Indexes (KPIs) and Budget

Section 5.1 has indicated several projects that the Department of Economic Development and Community Services will have to lead and fund. It is important to note that not all projects will require budgets as these activities will form part of the department's normal day-to-day business. In some cases, there will be some additional costs, such as travel. To cater for these costs, a stipends category had been included in the budget.

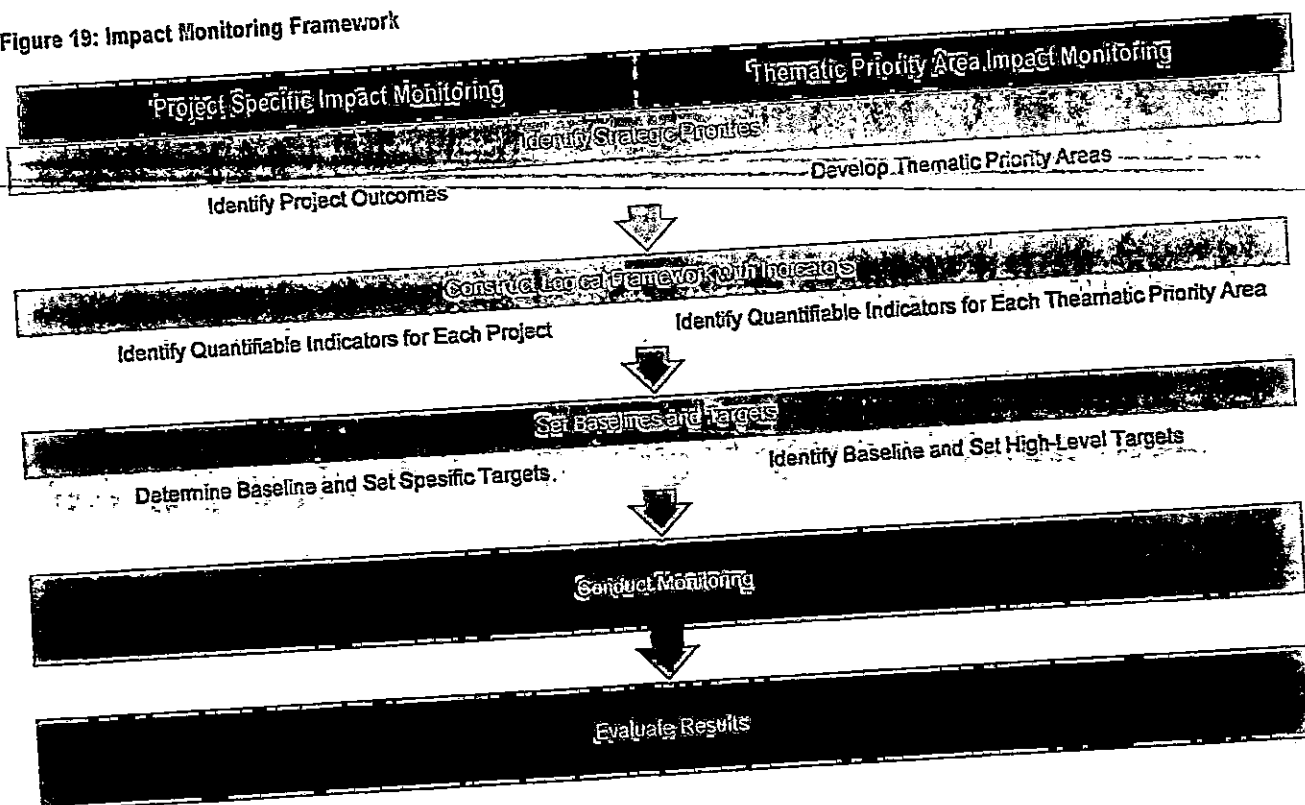
Table 5-6: Projects to be Led and Funded by the Department of Economic Development and Community Services in CoW

Projects	KPI	Estimated High-Level Budget	Budget Type	Budget period(s)
Department of Economic Development and Community Services in CoW is responsible to lead and fund the project				
WED and Investment Forum.	Conduct 12 WED and Investment Forum p.a.	N\$120,000	Annual	2021-2026
<ul style="list-style-type: none"> • Agriculture and agro-processing • MSME • Precinct and Association • Tourism 				
Include a MSME support desk inside the Business Development / Investor Liaison Desk		Stipends		2021-2026
<ul style="list-style-type: none"> • Assist small business to apply for national incentives. • Assist small business with marketing and promotion • Business Directory • Assist with Business Email and Websites 				
Partner with stakeholders	Hold 240 stakeholder meetings with the top 60 stakeholders p.a.	Stipends		2021-2026
<ul style="list-style-type: none"> • Agriculture and agro-processing stakeholders • Partner with Development agencies such as NCCI Khomas Region, NUST, etc. on: <ul style="list-style-type: none"> ○ Research and Development ○ Entrepreneurship and Incubation ○ Innovation Marketplace ○ Marketing and Promotion • Encourage private sector involvement in below-entry-level housing market 				
Conduct an Agriculture Cultivation and Agro-Processing Strategy study to identify the best crops, freshwater fish and livestock options for CoW.		N\$800,000	Once-Off	2021-2026
Develop Agricultural Produce Value Chains		N\$1,000,000	Once-Off	2022-2023
<ul style="list-style-type: none"> • Conduct market value chain studies (local and export supply and demand studies) for all selected crops • Identify potential agro-processing investment opportunities • Identify potential agro-processing investors 				
Develop an Export Strategy		N\$1,000,000	Once-Off	2023-2024
<ul style="list-style-type: none"> • Identify local businesses that produce products that could potentially be exported • Identify potential markets for locally produced products, including leather, cosmetics, etc. 				
Develop circular walkable tourist routes (with Route Markers)	Develop three routes, including signage for routes	N\$600,000	Once-Off	2021-2022
Employ qualified tour guides	Employ two trained guides	N\$300,000	Annual	2022-24
Develop a tour guide app (GPS prompts)	Develop one tour guide app	N\$500,000	Once-Off	2022-23
		N\$60,000	Annual	2023-24
<ul style="list-style-type: none"> • Upgrade and develop tourist attractions (with attraction custodians) • Transfer custodianship of attraction to CoW if required 	Select and upgrade four tourist attraction p.a.	N\$2,000,000	Annual	2021-24

The M&E system must provide systematic feedback to project owners and decision makers about the outcome and consequences of government action. Figure 19 illustrates that there are two main types of M&E, namely **implementation monitoring**, which focusses on the management of programmes and projects and its outputs and outcomes, as well as **impact monitoring** which focuses on high-level outcomes to thematic areas. These thematic areas can be pillar or sectoral based or theme based such as 'economic development'. These two types of M&E can incorporate a number of M&E activities, including, but not limited to:

- Results monitoring – tracks effects and impacts
- Process (activity) monitoring – tracks the use of inputs and resources, progress of activities and the delivery of outputs
- Compliance monitoring – track deliverables of projects
- Financial monitoring – accounts for costs by input and activity
- Organisational monitoring – tracks the achievement of organisational goals and outcomes

Figure 19: Impact Monitoring Framework



5.3.3.1. Project Specific Impact Monitoring

Each project has a unique workplan, human resources and budget against which project progress can be tracked (i.e. project inputs and activities). This includes measuring the completion of project steps or deliverables against the predefined deadlines in the workplan and ensuring that the project remains within its proposed budget. Implementation monitoring focusses on two main measures, namely:

- Measuring project outputs, i.e. has the project deliverables been completed.
- Measuring project outcomes, i.e. has the project goals or objectives been achieved.

Project Scorecard

For each project, a project scorecard needs to be developed to track the project's implementation. Each project scorecard will focus on providing an overview of the project output and outcomes. Table 5-7 illustrates a basic project scorecard that should be updated on a weekly or monthly basis and Section 7.1 on page 123 provides an example of how to complete a project scorecard. Project specific outcomes are easy to attain and report on since

each project's project scorecard will contain the main objectives. Before the study commences, each project needs to be benchmarked against available data which may include:

- What inputs are required for the project? E.g. resources and personnel
- What are the main activities of the project? E.g. Meeting or new infrastructure
- What are the project outputs or deliverable? E.g. Strategy document
- What is the desired outcome of the project? E.g. Main goal or objective
- What impact should the project have? E.g. Number of jobs created

Table 5-7: Project Scorecard

Project Name:			
Project Location:			
Project Driver:			
Project Funder:			
Project Budget:			
Project Man-Hours:			
Project Kick-Off Date:			
Project Deadline:			
Key Project Objectives (according to the terms of reference)			
Project Objective	Baseline Measure (before study)	Performance Measure (targets)	Target Achieved
Project Objective 1			Yes / No
Project Objective 2			Yes / No
Project Objective 3			Yes / No
Project Phase	Deliverable	Deadline	Actual Completion Date
Phase Budget	Actual Cost	Man-hours spent on phase	
Phase 1	Deliverable 1		
Phase 2	Deliverable 2		
Phase 3	Deliverable 3		
Phase n	Deliverable n		

Project Management Report

The project management report will summarise the active and future projects and should be updated on a monthly basis. This will provide Council and top management with a quick overview of all projects and will assist with the identification of potential problem areas such as projects running behind schedule, projects going over their allocated budget or projects not achieving their targets. The project management report is illustrated in Table 5-8 and Section 7.2 on page 123 provides an example of how to complete a project management report.

Table 5-8: Project Management Report

Project Name	Project Location	Project Driver	Project Phase	Project on Schedule	Project within Budget	Project within Man-hours allocation	Project Achieved Targets
Project 1				Yes / No	Yes / No	Yes / No	Yes / No
Project 2							
Project 3							
Project n							

5.3.3.2. Thematic Priority Area

M&E at the Thematic Priority Areas are predominantly conducted at an issue, sectoral or programme level as identified in municipal strategies. Table 5-9 illustrates the thematic priority area assessment tool that can be used to monitor progress.

To perform effective M&E at Thematic Priority Level, CoW needs to select appropriate parameters against the thematic priority areas. Table 5-10 provides an example of indicators that could be used to track potential themes,

based on pillar, sector or programme outcomes and deliverables. Data for each parameter can be obtained from several sources, including but not limited to National Statistics Agency (NSA), community, business or industry-specific surveys, or programme and project inputs, activities, deliverables, outcomes and impact. Where data is not available, anecdotal data must be collected by means of stakeholder engagements or interviews with key stakeholders.

Due to the lack of regular data releases, it is proposed that Thematic Priority Areas only be assessed on an annual basis. Table 7-3 in Section 7.3 on page 124 provides an example of how the thematic priority area assessment tool could be used.

Table 5-9: Thematic Priority Area Assessment Tool

Key Performance Area: Agriculture and Agro-Processing							
Pillar Objective:							
Standard (Criteria)	Indicator	Source	Benchmark	Failed to Achieve Standard	Target or Standard Range	Exceeded Standard	Comment

Table 5-10: Example of Indicators for Thematic Priority Areas

Theme	Potential Indicators / Types of Indicators
Overall Windhoek Economic Development Strategy outcomes (GDP growth, job creation, reduce risk, improved infrastructure, increase personal income, improve wellness and prosperity).	<ul style="list-style-type: none"> • GDP / GVA • Employment / Unemployment • Access to Bulk Infrastructure • Household Income • Household Consumption • Etc.
<p>The relevant strategic intervention objectives, e.g. LED pillars:</p> <p>Agriculture and Agro-Processing - To increase the cultivation of agricultural products and to add value to this primary input through local manufacturing and processing plants. This is of strategic importance to reduce food-security risk to CoW.</p> <p>Transport and Logistics - To improve connectivity by improving its local and bulk transport and logistics networks.</p> <p>Tourism - To improve on its tourism product offering to encourage tourists to extend their stay within CoW.</p>	<ul style="list-style-type: none"> • Agricultural commodity production levels. • Number of households actively involved in agriculture. • Road conditions (via transport engineer audit) • Number of paid tourists at key sites • Number of signatures in tourist log-book (at OMD offices) • Number of visitors in lodges / places of accommodation • Tress Index • Number of business in various industries (via company registrar or annual business survey)
MSME - To diversify and expand existing formal & informal businesses in CoW through business support and networking and to stimulate the development of new businesses.	<ul style="list-style-type: none"> • Number of complaints • Perception on key issues (via annual community survey) • Business Confidence (via annual business survey) • Bulk Service
Social Development - To become a caring city by addressing the social needs of those who reside in it.	
Creating and Enabling Environment - To improve the enabling environment to encourage economic development and investment in CoW.	

5.3.4. Evaluation

By periodically analysing the data, the overall success of its interventions can be determined, as well as create a better understanding of resource and capacity utilisation. When scrutinising the outputs and outcomes of the pillars, programme and project, the following questions should be posed:

- Were the necessary resources and capacity allocated to the programme and project?
- Were the required project resources and capacity correctly estimated?
- Did the programme and project have the desired outcome and impact?
- Did the sum of all programmes and projects achieve the main pillar goals?

5.3.5. Reporting

Monthly and annual reporting needs to be implemented. Due to the frequency of availability of data, monthly reports should focus on projects updates, while annual reports focusing on strategic interventions and programmes

6. References

6.1. Image Sources

The images used in the economic strategic framework on page 35 were sourced from the following websites.

Strategic Intervention	Website Link
Agriculture and Agro-Processing	https://www.hydroponics-simplified.com/commercial-hydroponics.html
Transport and Logistics	https://hennescapital.com.au/category/transport-logistics/
Tourism	https://www.biznews.com/africa/2018/11/01/namibia-land-debate-lessons-for-sa
Trade Development	https://www.truelocal.com.au/business/business-hub-offices/seaton
Social Development	http://www.murphymomanus.com/markets/healthcare.php
Creating an Enabling Environment	

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7. Addendum

7.1. Completing the Project Scorecard

Table 7-1 provides an example of how to complete a project scorecard using the 'Increase Agriculture Stakeholder' – project as an example.

Table 7-1: Project Scorecard

Project Name: Taking over and Establishment of Community Garden Project Location: Increase Agriculture Stakeholder Project Driver: LED Project Funder: LED / CoW Project Budget: R200,000 Project Man-Hours: 350-hours Project Kick-Off Date: 10 October 2019 Project Deadline: 19 December 2019						
Key Project Objectives (according to the terms of reference)						
Project Objective	Baseline Measure (before study)		Performance Measure (targets)		Target Achieved	
Improve uptake of agricultural amongst households	12 community members		50 community members		No – Only achieved 40 community members	
Project Phase	Deliverable	Deadline	Actual Completion Date	Phase Budget	Actual Cost	Man-hours spent in phase
Phase 1: Community Survey	Research Report	30 Oct 2019	30 Oct 209	R50,000	R50,000	150 hours
Phase 2: Draft Business Plan	Draft Business Plan	30 Nov 2019	30 Oct 209	R120,000	R120,000	150 hours
Phase 3 Final Business Plan	Final Business Plan	19 Dec 2019	19 Dec 20109	R30,000	R30,000	50 hours

Note! The data used in this table is for illustrative purposes only.

7.2. Completing the Project Management Report

Table 7-2 provides an example of how to complete the project management report. Project 1 illustrates a project that had already started and had been completed; while Project 2 illustrates a project that is in process and Project 3 illustrates a project that still needs to start (i.e. the project will start on 22 April 2022).

Table 7-2: Example on How to Complete Project Management Report

Project Name	Project Location	Project Driver	Project Phase	Project on Schedule	Project within Budget	Project within Man-hours allocation	Project Achieved Targets
Project 1	Community Garden	LED	3/3 Completed	Yes	Yes	Yes	1/2
Project 2	CoW Airport	LED	1/3	Yes	Yes	Yes	n/a
Project 3	CoW CBD	LED	22 April 2022	n/a	n/a	n/a	n/a

Note! The data used in this table is for illustrative purposes only.

7.3. Completing the Thematic Priority Area Assessment Tool

Table 7-3 provides an example of how to setup and complete the thematic priority area assessment tool for the 'Agriculture and Agro-Processing' Pillar.

Table 7-3: Example on How to Complete the Thematic Priority Area Assessment Tool

Key Performance Area: Agriculture and Agro-Processing							
Pillar Objective: To increase the cultivation of agricultural products and to add value to this primary input through local manufacturing and processing plants. This is of strategic importance to reduce food-security risk to CoW.							
Standard Criteria	Indicator	Source	Benchmark	Failed to Achieve Standard	Target or Standard Range	Exceeded Standard	Comment
Increase production of non-potable water	Non-potable water volume	CoW Dept Water	0.5 million m ³ /annum	< 1 million m ³ /annum	1 to 1.5 million m ³ /annum	> 1.5 million m ³ /annum	
Increase in access to non-potable water for farmers	Non-potable water accounts	CoW Dept Water / Accounting	50 farms	< 100 farms	100 to 120 farms	> 120 farms	
Increase in the number of households involved in agriculture actively.	Number of households involved in agriculture	NSA or annual community survey or agricultural survey	100 households	< 250 households	250 – 300 households	> 300 households	
Increase in the number of aquaponics and hydroponics farms	Number of aquaponics and hydroponics farms	Annual agricultural survey	3 farms	< 12 farms	12 – 15 farms	> 15 farms	
Review of farmland access and availability in CoW complete	Study Document	Study Deliverable	None	Study not completed	Study completed		
Conduct an Agriculture Cultivation and Agro-Processing Strategy study	Study Document	Study Deliverable	None	Study not completed	Study completed		
Held agriculture and agro-processing sessions in Economic Development and Investment Forum	Forum Meetings	Economic Development and Investment Forum Programme	None	< Four sessions	Four sessions	> Four sessions	

Note! The data used in this table is for illustrative purposes only.

Windhoek Economic Development Strategy Public Guide 2022 -2027

Contents

1. Acronyms.....	3
2. Introduction.....	4
3. City of Windhoek Economic Development Framework	4
4. Strategic Interventions.....	5
4.1 Agriculture and Agro-Processing.....	5
4.2 Transport and Logistics	8
4.3 Tourism.....	10
4.4 Micro, Small & Medium Enterprises (MSME)	13
4.5 Informal Sector.....	16
4.6 Social Development.....	18
5. Create and Enabling Environment.....	21

1. Acronyms

AMTA	Agro-Marketing and Trade Agency
CoW	City of Windhoek
GDP	Gross Domestic Product
GVA	Gross Value Added (at constant price)
MAWF	Ministry of Agriculture, Water and Forestry
MCCW	Municipal Council of the City of Windhoek
MSME	Micro, Small and Medium Enterprises
NUST	Namibia University of Science and Technology
WED	Windhoek Economic Development

2. Introduction

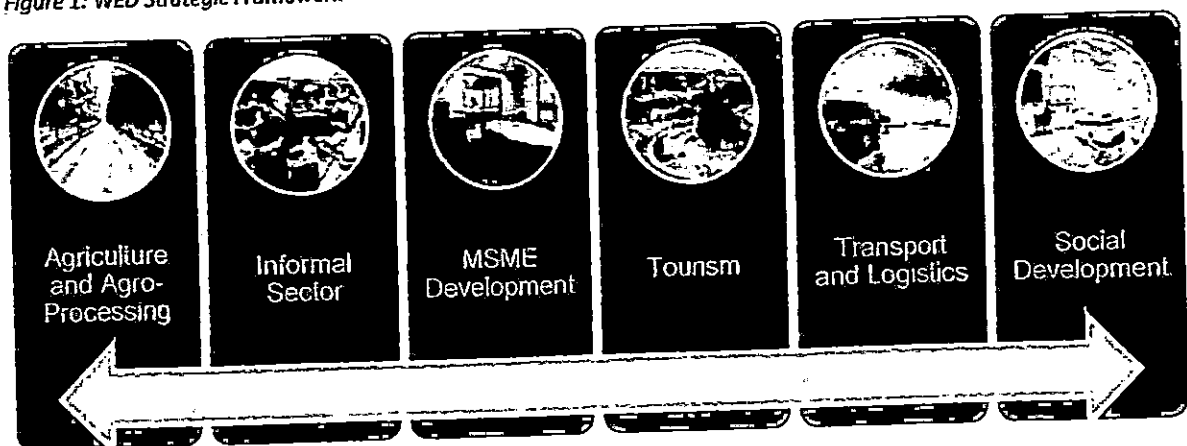
The Windhoek Economic Development Strategy explores a variety of options on how to further enable investment, job creation and generate increased economic growth. This document serves as a guide to the public and highlights key findings of the strategy document such as developmental advantages, opportunities, and needs, as well as Windhoek's existing competitive sectors, and industries with untapped potential. Unlocking existing potential and increasing foreign direct investment will further develop and enhance the City's economy through increased growth resulting in increased development.

The study was conducted in conjunction with the Investment Incentive and Promotion Strategy (IIPS), which focusses on the attraction, retention, and promotion of investment in the City.

3. City of Windhoek Economic Development Framework

Though economic development is one of the key objectives, the aim to generate economic development whilst ensuring the protection and promotion of the overall existing environment. The environment in consideration includes the natural, economic, and social environment which are underpinned by good infrastructure and the proper application of targeted intervention through the adopted policy framework. Figure 1 indicates the sectors that form part of the strategic framework.

Figure 1: WED Strategic Framework



Making use of the identified strategic framework and relevant areas of focus, the strategy is to achieve the following outcomes with the implementation:

- Increased GDP Growth
- Job creation
- Improved Infrastructure
- Mitigate against risks
- Increase per capita income levels
- Improved prosperity

4. Strategic Interventions

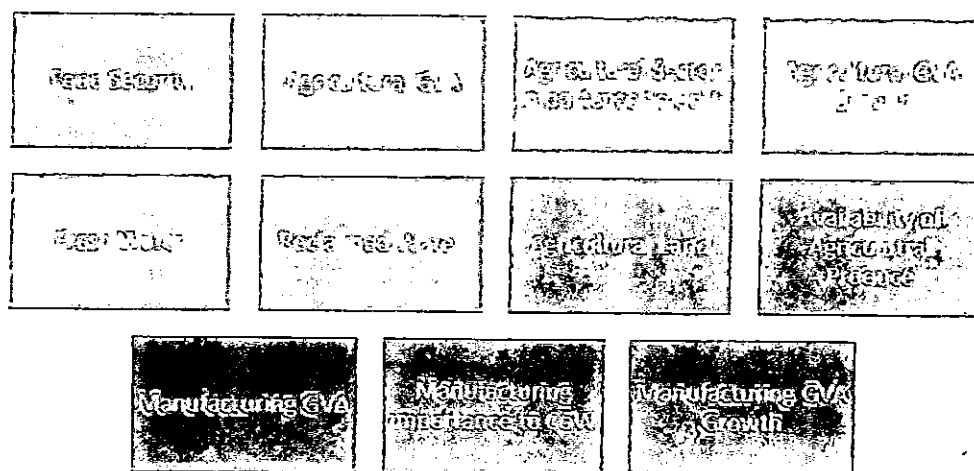
The WED Strategy outlines key areas for strategic intervention. Strategic intervention, which will enable the proper and timeous implementation of existing projects and programmes within each sector.

4.1 Agriculture and Agro-Processing

This intervention aims to increase the cultivation and production of agricultural products, as well as add value to primary products by actively facilitating local manufacturing and processing plants. This is a key sector for intervention as the population of Windhoek continues to grow. The increase in population growth will lead to an increased demand and need for locally produced agricultural products.

The Agricultural Sector is comprised of forestry, horticulture, crop, and livestock farming. Whereas Agro-Processing refers to the transformation of primary agricultural products, this adds value and transforms agricultural produce into semi-finished or ready to use products. Processes such as slaughtering, moulding, cutting, milling, and packaging fall under agro-processing. Figure 2 indicates the key factors that influence the performance of the Agriculture and Agro-Processing Industry in the City.

Figure 2: Factors Influencing Agriculture and Agro-Processing



Taking the above factors into account a variety of programmes and projects aimed at creating an enabling environment for increased productivity and development within the Agriculture and Agro-Processing sector and are presented in Table 1.

Table 1: Agriculture and Agro-Processing Programmes and Projects

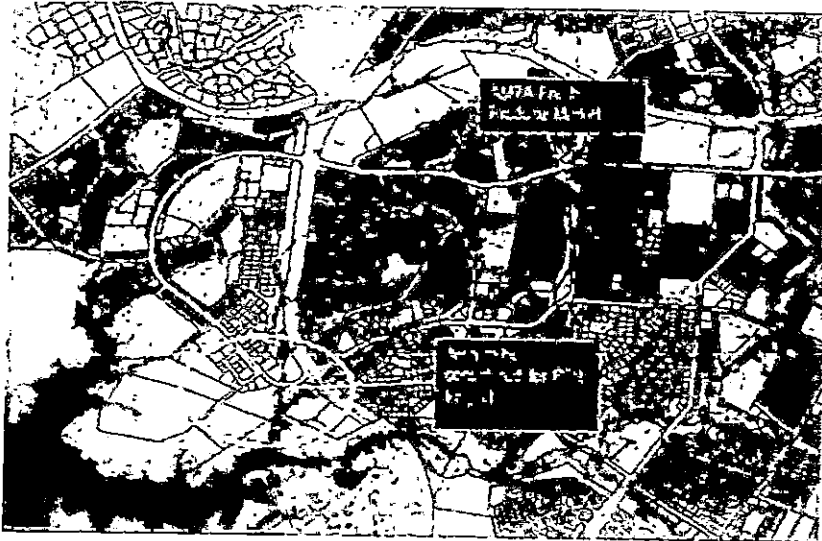
Programmes	Projects
Increase Water Recovery	<ul style="list-style-type: none"> ◦ Increase non-potable water recovery for agricultural use ◦ Sink more boreholes
Access to Farmland	<ul style="list-style-type: none"> ◦ Review farmland access and availability ◦ Identify municipal farmland close to existing non-potable water infrastructure for aquaponics and hydroponic farming
Increase Water Supply to Selected Farmland	<ul style="list-style-type: none"> ◦ Water pipeline for potable and non-potable water between water plant and cluster farms
Increases Agricultural Stakeholders	<ul style="list-style-type: none"> ◦ Schedule agriculture and agro-processing sessions as a regular feature in the Economic Development and Investment Forum, partner with stakeholders such as existing commercial farmers, NUST and other academic institutions to improve production (technology, genetics, new methods. Etc)
Increase Agricultural Produce (crops, organic & livestock)	<ul style="list-style-type: none"> ◦ Identify best options for crops, livestock, and freshwater fish production ◦ Increase support of aquaponic and hydroponic farms by providing land and non-potable water ◦ Increase livestock production by providing land, ensuring farms have required water rights and ensure stable water supply through improved water infrastructure such as boreholes
	<ul style="list-style-type: none"> ◦ Increase support of organic produce as well as household agriculture/roof gardening, etc.
Value-Chain Development of Agricultural Produce	<ul style="list-style-type: none"> ◦ Develop Value-Chains by conducting market studies for selected crops and identify potential agro-processing opportunities and investors
Agro-Processing	<ul style="list-style-type: none"> ◦ Support the Fresh Produce Hub (AMTA)

Agricultural Pilot: Spatial Analysis

Farmland that is suitable for water-efficient agricultural production activities such as hydroponics and aquaponics is not readily available. However, the MAWF through AMTA is currently busy with the development of the Fresh Produce Business Hub on land located about 1.5km to the north of the Goreangab Dam and the water reclamation works. Given the fact that there are no significant agricultural production activities currently taking place in the City, it is regarded as prudent to start this initiative in conjunction with AMTA and the facilities it is already busy developing.

As a result, it is recommended that land be earmarked that can be allocated on an affordable lease basis to MSME producers to start with small-scale horticultural activities as found suitable in the to-be-developed agriculture cultivation and agro-processing strategy. Map 1 below indicates the proposed location for the pilot project and outlines the area for consideration as well as the position of the Fresh Produce Business Hub that is under construction.

Map 1: Proposed location for Agricultural Pilot Project



Having considered the location requirements for such agricultural land, it is proposed that a MSME pilot project be located in an area next to the Goreangab dam. This area is about 1.5km from the Fresh Produce Business Hub, has good road access, can easily be provided with bulk services and is currently vacant. Since specific erven may already be allocated for specific uses and projects, an area has rather been identified within which suitable land can be selected.

Further Agricultural Development: Spatial Analysis

Upon successful implementation of the previously described project, an increase in demand and interest for land is expected which will lead to the establishment of larger ventures. It is in consideration that the area to the East of the B1 main road to Okahandja, just North of the existing Ujams Water Treatment Facility, be earmarked for such development. The quality of the purified effluent (Special Standards) from this facility is adequate and previous activity in the form of an instant-lawn growing facility was located in this area before. Given the small space requirements for these types of agricultural production, this is a substantial portion of land that is suited for the purpose. It is strategically located about 8 km from the Fresh Produce Market with good road access. Map 2 below provides an indication of the location of this portion of land.



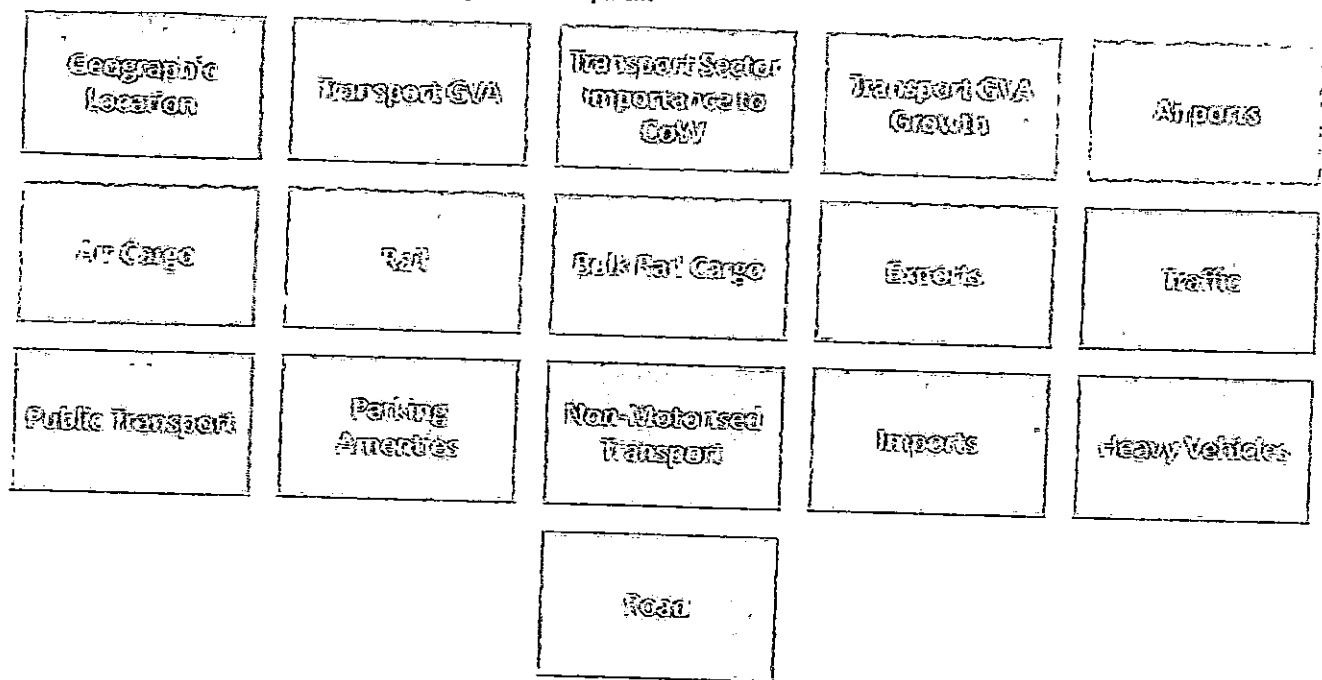
In addition to the above-mentioned projects, the envisaged programmes and the accompanying projects outlined in Table 1 will generate a variety of community benefits as well as private sector opportunities.

The benefits to the community because of the implementation of the listed projects, include a higher level of food security, increased employment in the sector as well as increased water security. An increase in agricultural produce and all related activity will bring about an increase in opportunities available to the private sector.

4.2 Transport and Logistics

This intervention aims to increase logistic and transport-related infrastructure within the City. This increase in infrastructure will improve connectivity through the further development of local and bulk transport and logistics. This includes road, rail, air, and any other logistic infrastructure necessary for the transport of goods and people. Transport is a critical factor in improving manufacturing, trade and tourism output as well as optimising the safety, speed and frequency of such services. Figure 3 b indicates the main factors that have an influence on the quality and condition of Windhoek's transport and logistics sector.

Figure 3: Factors Influencing Transport & Logistics Development



Considering the varying factors that influence the sector a variety of programmes and projects were created for an enabling environment for development within the Transport and Logistics sector, the programmes and projects are presented in Table 2.

Table 2: Transport and Logistics Programmes and Projects

Logistics Support Structures	<ul style="list-style-type: none"> Upgrade Logistics Hub such as truck stop, rail yards, air cargo and piggyback infrastructure Upgrade Rail Support Services such as rolling stock maintenance yard and marshalling yards Review capacity of storage facilities (warehouse, cold storage) as logistical support structures to access sufficiency to accommodate growth trends in logistics
Local Public Transport	Review of Transport Plan (together with Spatial Development Framework) <ul style="list-style-type: none"> Transport node development Transport route developments Airport-tourist hub bus route Licensing of private sector operators in tourist areas
Implement a Non-Motorised Transport Plan	Implement Non-Motorised Transport Strategy <ul style="list-style-type: none"> Pedestrian walkways Cycle lanes

Transport and Logistics: Spatial Analysis

The Agri Logistics Hub must be combined with the Fresh Produce Market and Hub which is currently under construction. Depending on the success and growth in agricultural production

in the region, the development of an Agri Logistics Hub will be considered as a second phase in a subsequent WED Strategy. The current locality of the Fresh Produce market is shown in map 1 and 2.

4.3 Tourism

The objective of this strategic intervention is to improve the tourism product offering to encourage tourists to extend their stay within the City. Increasing the length of time tourists spend in the City, will increase tourism-related income. However, numerous factors influence the performance of the tourism sector and are indicated in Figure 4.

Figure 4: Factors influencing Tourism

Tourist Accommodation	Tourist Attractions	Tourism Programmes	Tourism Business Information	Tourist Support Structures
Tourism Business Conference	Tourism Business Growth	Tourism Associations	Tourism Information Centre	Tourist Safety & Security
Local Transport System	Tourism Signage	Tourism Grading	Parks	Tourist Support Structures

The City has several advantages that it can leverage to develop a tourism product offering that is appealing to both domestic and international tourists. Windhoek has a good tourism system; however certain elements remain underdeveloped.

Currently, Windhoek acts as a transit city for tourists where international tourists enter Namibia through Hosea Kutako International Airport, rent a vehicle, and go on safari. This means tourists spend a limited amount of time in Windhoek. The recently developed Tourism Strategy will guide implementation to address this problem. Taking the influencing factors into account the Programmes and Projects pertaining to the Tourism sector are indicated in Table 3.

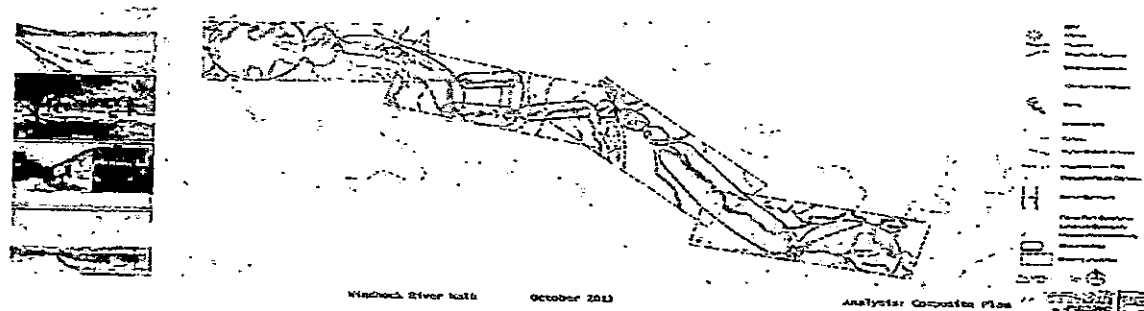
Table 3: Tourism Programmes and Projects

Tourist Attraction Development	Circular Walkable Tourist Route <ul style="list-style-type: none"> ◦ Develop a circular walking route with clear markers ◦ Employ qualified tour guides ◦ Develop a CoW mobile app
Tourism Transport	Develop transport between attractions <ul style="list-style-type: none"> ◦ Bus service to the airport ◦ Licensing of transport operators on and between tourist attraction routes
Tourism Zoning	Rezone businesses in tourism areas
Tourism Marketing and Grading	<ul style="list-style-type: none"> ◦ Promote tourism grading ◦ Destination Marketing – update MCCW website tourism section ◦ Review tourism signage ◦ Relocate tourist information centre
Tourism Skills Training	Basic tourism skills short courses such as food preparation, housekeeping, and other training

Tourism: Spatial Analysis

Various operators offer different city tours, some of which include a tour of Katutura. This is especially favoured by tourists as it provides a balanced understanding of the City. This includes how the City was influenced by colonial administration and other tourist attractions. The main tourist attractions include Alte Feste, Christuskirche, the Independence Museum, Tinten Palast and various craft markets. This is a tourist product to encourage and expand, and more operators with bicycle tours and e-bike Tuk-Tuks are also entering the market.

However, most tourists explore Windhoek's key attractions on foot, and they have few facilities and little guidance to find and explore these attractions. The Riverwalk concept indicated by map 3, was developed by local private stakeholders and regard the rivers in the City as an asset. The rivers must be used and developed as a non-motorised transportation mode running from the Avis Dam east of the City, to the Goreangab Dam to the west of the City. This will contribute towards increased integration of the City as well as provide for the development of various types of tourism, business, community, residential, recreational and other facilities along the way.



It aims to encourage properties abutting onto the Riverwalk to turn their facades towards the river walk rather than towards the street and contribute to the ambiance of the proposed facility. Obviously, landscaping, paving for cycle and pedestrian lanes, street cafes, integration with existing hotels and guest houses, etc. all forms part of the concept. In addition, it is acknowledged that it must be integrated with the rest of the city and a number of “city walks” could branch off the Riverwalk and take tourists and to particular attractions.

Map 4 shows the proposed circular route, starting at Joe’s Beerhouse where a short link along Nelson Mandela Avenue to the west leads to the village where boutique restaurants and a pleasant environment offers something to drink before the traveller could follow a sidewalk towards the south along Robert Mugabe Avenue. Along the way they could visit the Franco Namibian Cultural Centre, and its little restaurant, the National Art Gallery, the Theatre of Namibia, the Tinten Palast and Parliament Gardens, the Independence Museum, Christuskirche and the Alte Feste. From there they can walk down to the Old Breweries with its craft markets, small galleries and quaint coffee shops. The circle gets closed by a walk along Independence Avenue through the Zoo park, past the Kudu and the old jail, and back to the village and Joe’s Beerhouse.

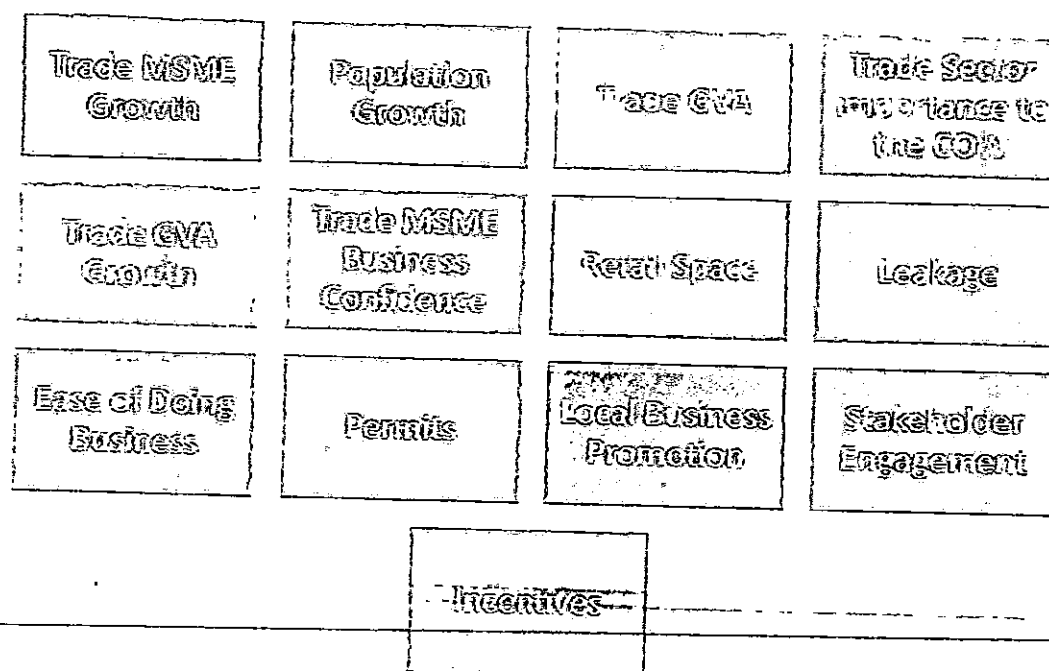
Map 4: Potential Circle Route



4.4 Micro, Small & Medium Enterprises (MSME)

Micro, Small and Medium Enterprises (MSME) is a crucial component of the Wholesale and Retail sector in the City. With the Khomas population growth rate at about 3.59% p.a., it is predicted that the population will increase from between 431,938 and 433,939 in 2018 to between 644,073 and 654,550 by 2030. This almost guarantees market growth, which is an attractive offering for local business and potential investors.

This strategic intervention is to diversify and expand existing formal and informal businesses in the City through increased business support and networking. In doing so, this will stimulate the expansion of existing businesses and the development of new businesses. Besides local government support for MSME there are many additional factors that have a significant influence. Figure 5 indicates the additional factors that influence the growth and development of MSME's.



This intervention is to facilitate the establishment of new businesses and the expansion of existing business within the City. The aim is to increase business operations by considering the existing limitations and barriers in the sector. This is to be done through increased stakeholder engagement, trade promotion, reducing restrictive regulations and more. Additionally, attention will be paid to the available formal and informal retail space in order to connect traders more effectively with their desired market.

A MSME Strategy is being developed to focus on the below 4 key areas:

- Development of a system for institutional support
- Strengthening MSME sector and providing institutional support
- Encouraging local growth
- Establishing local market

Table 4 below outlines the Programmes and Projects geared towards improving the growth and encouraging the establishment of MSME's.

Table 4: MSME Programmes and Projects

Local Forums	WED and Investment Forum
Localisation	<ul style="list-style-type: none"> • Create or support a 'Buy Windhoek' programme • Prioritise local procurement by CoW's supply chain

Projects	
MSME Support and Promotion	<p>Include a MSME support desk inside the Business Development/Investor liaison desk to:</p> <ul style="list-style-type: none"> ◦ Assist small businesses in applying for national incentives ◦ Assist with marketing and promotion ◦ Business directory ◦ Assist with business email and websites <p>Develop incubation centres</p>
Informal Trade Support	<ul style="list-style-type: none"> ◦ Upgrade selected informal markets ◦ Develop public facilities near informal markets
Improved Wi-Fi Connectivity	<ul style="list-style-type: none"> ◦ Roll out Wi-Fi hotspots
Partner with MSME Development Agencies	<p>Partner with Development agencies such as NCCI Windhoek Branch, NUST, etc. on:</p> <ul style="list-style-type: none"> ◦ Research and development ◦ Entrepreneurship and incubation ◦ Innovation Marketplace ◦ Marketing and Promotion
Reduce Red Tape	<ul style="list-style-type: none"> ◦ Review existing permit processes ◦ Develop e-systems for dealing with construction permits, accessing electricity, registering property, obtaining liquor licenses and permits to sell food
Export Development and Promotion	<p>Develop and export strategy to:</p> <ul style="list-style-type: none"> ◦ Identify local businesses that produce products which could potentially be exported ◦ Identify potential markets for locally-produced products including leather, cosmetics, etc.

MSME: Spatial Analysis

Land for MSME development must always be an integral part of planning and zoning decisions. It has already been stressed that business and industrial land must be “decentralised” closer to the periphery and the people. In addition, thereto, it is very important to consider the mix of erf types and sizes included in such planning.

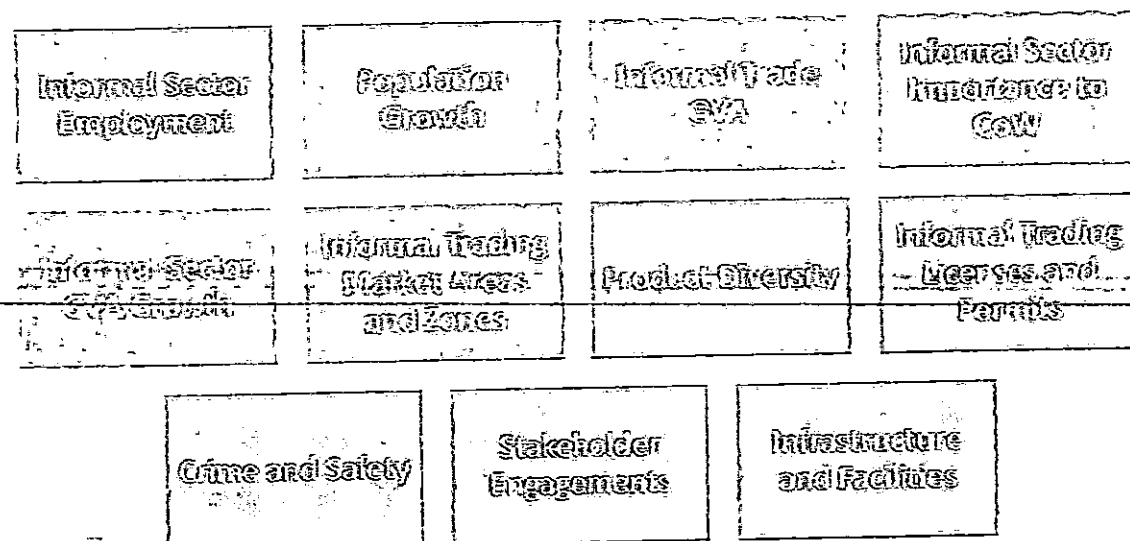
It is of particular importance that MSME needs, such as incubation hubs and small industrial units, be incorporated in the initial design mix. A range of possibilities needs to be available, from the lowest level and cheapest incubation hub, through clustered business units to larger units to where successful MSMEs can move if they grow out of their shoes. The same would be true for industrial areas where a similar approach must be followed.

Therefore, MSME facilities must be integrated into the planned urban fabric and regarded as an important component, often supporting their more developed counterparts as well as larger formal businesses. Mixing these together not only benefits the smaller traders and manufacturers, but also helps the bigger ones to obtain services at reasonable rates and creates synergies that are to the benefit of all.

4.5 Informal Sector

The objective of this strategic intervention is to diversify, integrate and support existing informal businesses through business support, improved infrastructure, and facilities. The informal sector is considered an integral component of the City's growth and development. It can be considered as a 'second economy' which provides significant employment and livelihood to many of the City's residents. Factors that influence the development of the Informal Sector are depicted in Figure 6.

Figure 6: Factors Influencing Informal Sector Development



The informal sector mostly comprises of very small enterprises (frequently fewer than five individuals) that generate quite low earnings for individuals. Considering the high unemployment rate (37.6% for Namibia in 2018), the informal sector continues to show potential in terms of its contribution to employment, but also to poverty reduction and the economy as a whole. The informal sector is a vital economic component in areas with very high unemployment rates.

In the strategic intervention for the informal sector, the focus is given to the following areas:

- Informal trade support
- Establishing the informal sector
- Establishing platforms for the City to engage with informal traders
- Linking the informal sector with tourism

Table 5 below outlines the programmes and projects proposed to encourage growth and investment in the Informal Sector

Table 5: Informal Sector Programmes and Projects

Informal Trade and Support	<p>Upgrade selected informal markets:</p> <ul style="list-style-type: none"> ◦ Oshetu market at the Katutura single quarters ◦ Soweto market ◦ Nangenda Kaduuluma market in Wanaheda ◦ Lyeeta open market in Okuryangava <p>Develop Public facilities near informal markets:</p> <ul style="list-style-type: none"> ◦ River Walk Initiative ◦ Non-motorised Transport Strategy ◦ Public Transport Nodes <p>Consider developing new informal markets based on the locality decisions made by informal traders themselves:</p> <ul style="list-style-type: none"> ◦ "4 ways" – Corner of Monte Christo and Matshitshi Roads ◦ Eveline Street ◦ China Town - Corner of Frankie Fredericks and Jason Hamutenya Ndasi Streets
Informal Sector Forum	<ul style="list-style-type: none"> ◦ Establishment of an Informal sector forum ◦ Participation of the informal sector at the Local Economic Development and Investment Forum
Informal Sector Incubation	Establish an incubation centre for the informal sector
Improved Wi-Fi Connectivity	Include Wi-Fi hotspots at the informal markets
Partner with the Informal Sector	<p>Partner with the informal sector, through stakeholder engagements and forums, to address the need for:</p> <ul style="list-style-type: none"> ◦ Business support ◦ Entrepreneurship support and mentorship ◦ Access to funding and/or financing
Reduce Red Tape	<ul style="list-style-type: none"> ◦ Review permit processes ◦ Develop e-systems for permits including licensing to sell food and alcohol

Informal Traders: Spatial Analysis

From a spatial perspective, it is important to consider the locality decisions made by informal traders. Planners and decision-makers will be sensitive to the locality decisions and preferences of these MSME activities and use and support those decisions as traders generally have a better understanding the markets and preferences better than planners and officials do. Examples of these are fourways in the Big Bend/Havana/Goreangab area, Eveline Street, Green Mountain Dam road in Goreangab and the vegetable market on Nelson Mandela road.

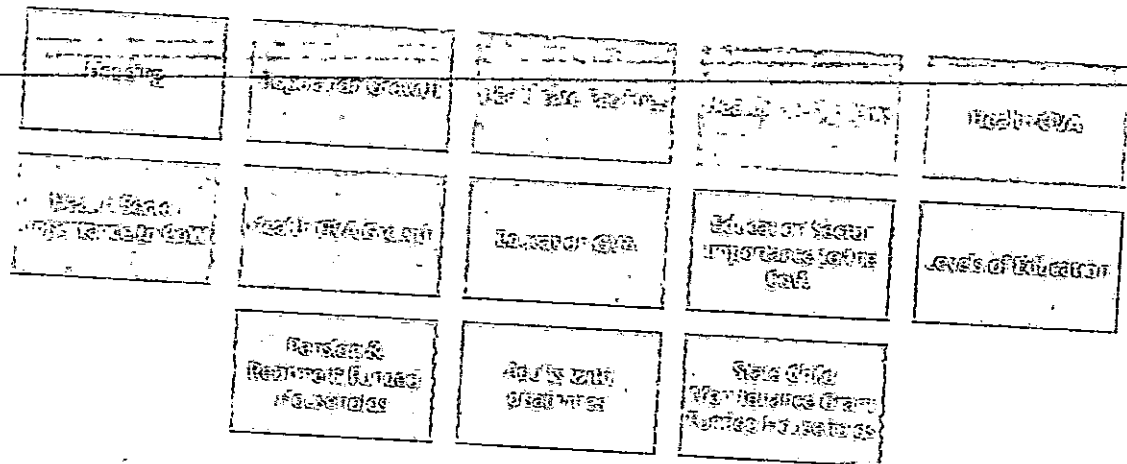
Planner and officials are well advised to follow these locality decisions as they generally work for the traders and is located according to client preference. However, it also brings difficulty in the sense that their produce must be transported to the trading site and back every day. It would therefore be quite prudent to explore ways in which to assist traders with facilities where they can store their wares. This could assist with the issuing of licenses as well as with regular communication between the city and the traders. However, such interventions, inclusive of the provision of services and facilities such as water, electricity, and sanitation/toilets, must not be so expensive that it forces the trader out of business.

It is imperative that any decisions taken regarding the improvement of conditions in existing informal trading areas and markets must be taken with and not for those traders. Participatory planning methodology must be used to understand their issues and then plan accordingly. It is actually more of a community and social development activity than a planning and infrastructure provision activity. Planners and engineers must participate in the process, but their interventions should only start after participatory decision making and social acceptance has been established.

4.6 Social Development

The objective of this strategic intervention is to become a caring city by addressing the social needs of its residents. The state and success of the social environment within the City is impacted by a multitude of factors. These factors are outlined below in Figure 8.

Figure 7: Factors Influencing Social Development



Social Development is impacted by many factors all with equal levels of importance, this includes quality education, healthcare and relevant care facilities. Taking these factors into consideration, the formulated selection of programmes and projects aimed at the development of the existing social environment. As stipulated in the Vision of Council, the City wishes to become a caring City. As such, the social development of the residents in Windhoek remains a key mandate.

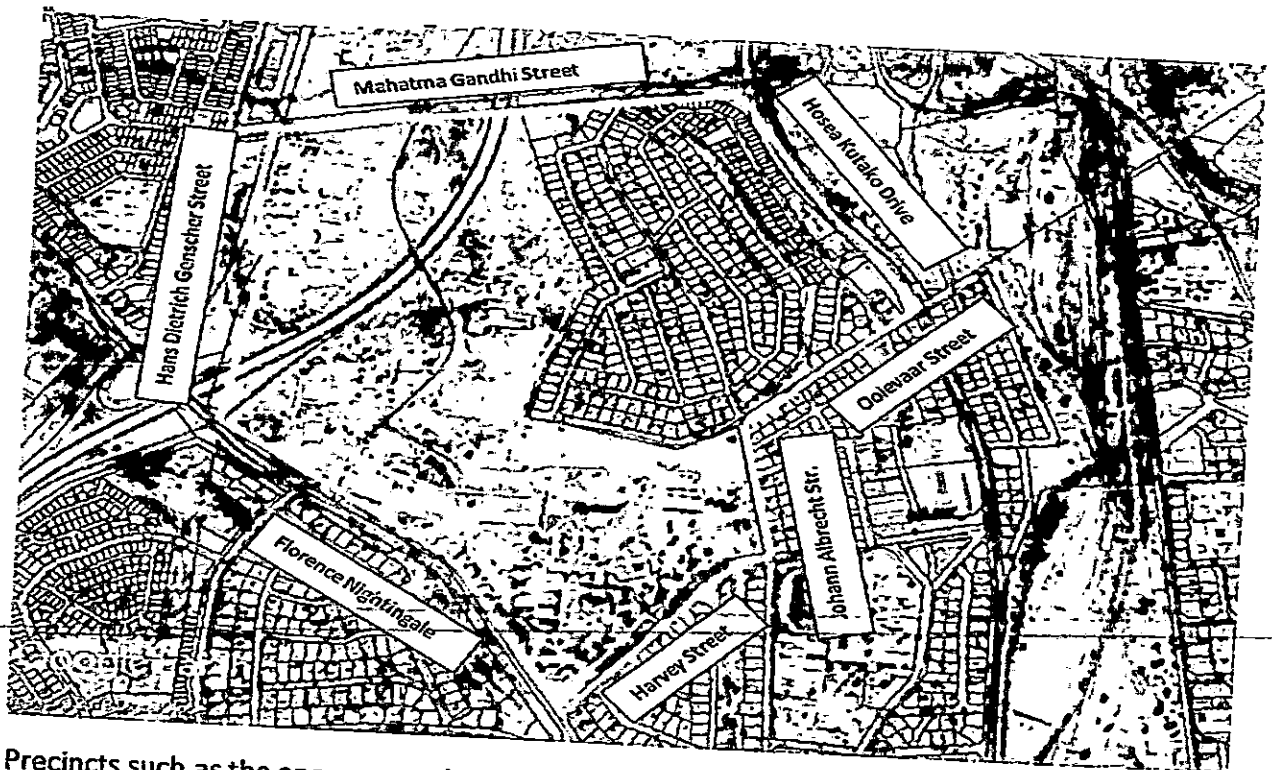
Figure 8 below depicts the programmes and projects relevant the social development.

Figure 8: Social Development Programmes and Projects

Housing	<ul style="list-style-type: none"> ◦ Densification of Housing Precincts ◦ Identify land available for development ◦ Low-cost Municipal Rental Housing ◦ Repurposing of underutilised buildings ◦ Encourage private sector investment in below-entry-level housing market
Health and Care precinct	Hospital Healthcare Precinct: <ul style="list-style-type: none"> ◦ Clinic ◦ Training college for nurses ◦ Housing for nurses and students ◦ Shelter for the homeless ◦ Soup kitchen ◦ Hospice ◦ Place of safety for women and children ◦ School and training facility (with hostel) for physically and mentally handicapped ◦ Mental healthcare treatment and rehabilitation centre ◦ Psychiatric institution
Retirement Precinct	Retirement Village: <ul style="list-style-type: none"> ◦ Self-car housing units ◦ Assisted living units • Dependent living units ◦ Frail care units ◦ Low-cost retirement units

Health Precinct: Spatial Analysis

Enabling the establishment of a health precinct and its related facilities and services, requires the City to identify the best location for such a precinct. The development of institutes and policies will enable this development and allow benefits to flow both to the public and private sector. Map 5 below illustrates the suggested location for the development of a new healthcare precinct.



Precincts such as the one proposed above, already exist. The development of MediCity drew a variety of medical practitioners, specialists, specialist units, retirement facilities and more hospitals into the area. Today, it can be regarded as a health services precinct. This is also the case for the Lady Pohamba Hospital and its surrounding services.

However, these are examples of private institutions which cater to the higher end of the market, making the development for more healthcare facilities that cater to the greater public necessary. Therefore, the area shown in map 5 above can be used as such a policy zone where more health-related functions, professionals and specialist services can be encouraged to develop and grow. It includes the State Hospital, its nurses' quarters, offices for the Ministry of Health and Social Services, the Rhino Park day hospital, a psychological specialist, various medical and dental practitioners, etc. It also includes the UNAM Academic Hospital and teaching facility. The residential houses in this policy zone will, over time, be allowed to re-zone and re-purpose to provide for other facilities such as retirement and old age care facilities and more specialist units.

Housing: Spatial Analysis

The current housing backlog is relatively large, with more than 40 000 households estimated to be residing in improvised housing in informal settlements. While another 50 000 to 60 000 households are expected to move to the City by 2030.

With respect to the provision of housing and infrastructure services, the plan must be based on an understanding of the characteristics of in-migrants, especially their levels of income and affordability. Accordingly, the plan must disaggregate the housing demand into various

realistic categories relating the cost of various housing solutions to the affordability levels of beneficiaries.

Council will embrace new private initiatives to develop new settlements such as the existing housing in Ongos and Monte Christo. Advantage can be to unlock development of private land through progressive decision-making and increased cooperation with the private sector.

5. Create and Enabling Environment

Creating an enabling environment for economic growth, development and investment is the cornerstone of the strategic framework. The process of creating an enabling environment involves reviewing interventions that cross-cut between sections of the existing strategic framework.

In context of local economic development, Council is to create an enabling environment for development and investment to take place. This implies that:

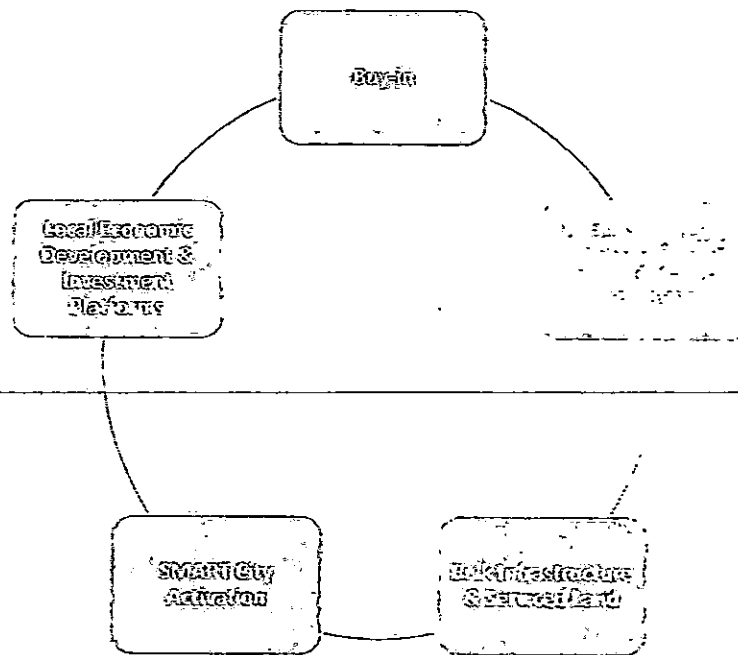
- Local government take a developmental approach, especially in connection with socio-economic development within the area
- Spheres of government, namely local, regional, and national government need to work together with each other to ensure that investment can take place. This implies improved integration and co-operation between local government, and regional and national ministries and other stakeholders. It must strive to avoid duplicating tasks and focus on establishing complementary roles for all stakeholders
- Broaden its tax base through the provision of basic bulk services and other infrastructure services
- Maintain local government assets and infrastructure
- Conduct spatial planning including zoning of various land uses
- Analyse the local economy and develop detailed plans for interventions
- Investigate local resources
- Investigate local comparative advantages
- Ensure that there is land available for development
- Develop local skills and capacity
- Investigate export opportunities for local produce and products

From an investment perspective, local government must:

- Foster and promote participatory citizenship and facilitate partnerships
- Conduct integrated development planning
- Ensure investor-friendly policy is in place with fixed guarantees on investment-related matters
- Reduce red tape by creating and streamlining processes relating to investment
- Develop internal capacity to engage the investment community
- Increase brand recognition and awareness of the area and its products
- Disseminate information and promote investment opportunities
- Implement sustainable community projects

Figure 10 below provides a simplified diagram of the actions local government aims to take in order to ensure and create an environment conducive for increased development and investment.

Figure 9: Creating an Enabling Environment



Theme:	Social Progression, Economic Advancement& Infrastructure Development <i>Description:</i> This theme is to ensure that the City is productive, inclusive and sustainable through rendering access to urban services, socio-economic opportunities, spatial inclusiveness, quality urban environment and vibrant city life.
Strategic Objective:	Ensure quality of life for all our residents & stakeholders.
Key Performance Area (KPA):	Social Progression, Economic Advancement& Infrastructure Development <i>Description:</i> The Economic Development KPA refers to ensuring that the City will drive economic inclusion to achieve sustainable economic growth and development.
Key Performance Indicator (KPI):	Implementation of Windhoek Economic Development Strategy <i>Description:</i> This indicator measures rate and impact of implementation of the Windhoek Economic Development Strategy to realise the attraction and retention of investments into Windhoek.

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
Strategic Pillar as per Strategy: Agriculture and agro-processing	2022/2023				
		Agriculture and agro-processing survey ■ Explore the existing urban agriculture challenges and opportunities. ■ Assess the utilization of existing farmlands and urban agricultural activities within the boundaries of Windhoek as attached as annexure A hereto. ■ Assess how urban agriculture can contribute to economic activities in the City. ■ Assess how urban agriculture can contribute to economic activities in the City.	N\$ 80 000.00	<ul style="list-style-type: none"> Database of agriculture and agro processors Extent of urban-agriculture in Windhoek 	Youth & Social Division Economic Development Division Agricultural producers UNAM Research Services Centre

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
		Assess role of informal trading and women in urban agriculture			
		Agriculture and agro-processing stakeholder engagement (will form part of the Windhoek Economic Development and Investment Forum)	N\$ 25 000.00	<ul style="list-style-type: none"> Improved business environment and livelihoods Inform development of Urban Agriculture Policy 	Youth & Social Division -Agricultural producers Economic Development Division
		Windhoek Economic Development and Investment Forum based on Windhoek's development community, was identified, which will seek to bring various stakeholders together, such as Council, property owners, academics, businesses and public sector agencies, to discuss matters of concerns and make solid recommendations that are geared towards the economic enhancement of the Capital. The Forum will cover citywide economic sectors, suburbs and Industries and is becoming more of a critical imperative given the recent extension of the city's cadastral boundaries, which will call for heightened coordination to meet the ever-increasing needs of a rapidly growing city.	N\$ 25 000.00	<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. Creating value chains to pool resources and promote joint development priorities 	Youth & Social Division -Agricultural producers -business community -academics SE's Council
Tourism		Establish a local tourism forum		<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. 	Tourism, heritage and arts and culture industries

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
				<ul style="list-style-type: none"> Creating value chains to pool resources and promote joint development priorities Joint marketing, Infrastructure development etc. 	
MSME Development		Local forum – MSME Development Forum	N\$ 50 000.00	<p>Strengthened and fostering local support system.</p> <p>Creating seamless value chains to pool resources and promote joint development priorities.</p>	<p>Developmental partners</p> <p>Financial institutions</p> <p>SE's Council</p>
Informal Sector		<p>Market upgrade:</p> <ol style="list-style-type: none"> 4-ways corner of monte Christo and matshitshi roads Onghendambala Market, Eveline street Truckport Relocation/Development 	<ol style="list-style-type: none"> Ongos Developer Viset N\$3 million 	Improved infrastructure, conducive trading environment	<p>-Contract Management Division</p> <p>-Planning, design and traffic flow</p> <p>Infrastructure Department</p> <p>City Police</p> <p>Private Developers</p>
Strategic Pillar as per Strategy: Agriculture and agro-processing	2023/2024	Windhoek agriculture and agro processing policy & Strategy	N\$ 200 000.00	<p>Targeted development and resource allocation towards best crop/freshwater fish/livestock for Windhoek</p> <p>Increased production</p>	<p>Youth and Social Division</p> <p>-Agricultural producers</p> <p>Economic Development Division</p>

499

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
				Employment creation	
		<p>Windhoek Economic Development and Investment Forum</p> <p>based on Windhoek's development community, was identified, which will seek to bring various stakeholders together, such as Council, property owners, academics, businesses and public sector agencies, to discuss matters of concerns and make solid recommendations that are geared towards the economic enhancement of the Capital. The Forum will cover citywide economic sectors, suburbs and industries and is becoming more of a critical imperative given the recent extension of the city's cadastral boundaries, which will call for heightened coordination to meet the ever-increasing needs of a rapidly growing city.</p>	N\$ 25 000.00	<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. <p>Creating value chains to pool resources and promote joint development priorities</p>	<p>Youth & Social Division</p> <p>-Agricultural producers</p> <p>-business community</p> <p>-academics</p> <p>SE's</p> <p>Council</p>
		Identification of suitable Cow farmland to be leased for agricultural produce & infrastructure best practices		Improved business environment, Food security and livelihoods	<p>Youth and Social Division</p> <p>-Agricultural producers</p> <p>Economic Development Division</p> <p>Property Management Division</p>
Informal Sector					
		Review of informal trading regulations (No review has been done since 2007)	N\$500 000.00	Improved infrastructure, conducive trading environment	<p>Traders</p> <p>Property management division</p>

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
					-Planning, design and traffic flow Infrastructure Department City Police Property Owners Trader representative organisations (NISO, VISET etc.)
		Market Development master plan (including outsourcing models of facilities based on different levels of operations)	N\$3 Million	Improved infrastructure, conducive trading environment Effective maintenance cycles implemented. Reinvestment of proceeds to fund entry-level market development	Property management division -Planning, design and traffic flow Infrastructure Department City Police Property developers Financiers Development agencies
Tourism		Develop a Tourism small and medium enterprises empowerment policy	N\$ 250 000.00	Value chain development Job creation	Tourism Industry members Educational institutions NTB
MSME Development		Market Development master plan		Improved infrastructure, conducive trading environment	Property management division -Planning, design and traffic flow Infrastructure Department City Police
		Create or support a "Buy Windhoek" programme		Strengthened and fostering local support system. Creating seamless value chains to pool resources and	Economic Development MSME's

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Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
				promote joint development priorities.	
Strategic Pillar as per Strategy: Agriculture and agro-processing	2024/2025				
		<p>Windhoek Economic Development and Investment Forum</p> <p>based on Windhoek's development community, was identified, which will seek to bring various stakeholders together, such as Council, property owners, academics, businesses and public sector agencies, to discuss matters of concerns and make solid recommendations that are geared towards the economic enhancement of the Capital. The Forum will cover citywide economic sectors, suburbs and industries and is becoming more of a critical imperative given the recent extension of the city's cadastral boundaries, which will call for heightened coordination to meet the ever-increasing needs of a rapidly growing city.</p>	N\$ 25 000.00	<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. <p>Creating value chains to pool resources and promote joint development priorities</p>	<p>Youth & Social Division</p> <p>-Agricultural producers</p> <p>-business community</p> <p>-academics</p> <p>SE's</p> <p>Council</p>
		Implementation of Agriculture cultivation and agro-processing strategy	N\$ 150 000.00	<p>Improved business environment, Food security and livelihoods</p> <p>Improved Gross Value Addition</p> <p>Employment Creation</p>	<p>Youth and Social Division</p> <p>-Agricultural producers</p> <p>Economic Development Division</p>

5027

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
		Agriculture and agro-processing stakeholder session	N\$ 20 000.00	Improved business environment and livelihoods	Youth and Social Division -Agricultural producers Economic Development Division
		Windhoek Economic Development and Investment Forum		Improved business environment and livelihoods	Business community Council
Informal sector		Implementation of Market Development master plan	N\$3 Million	Improved infrastructure, conducive trading environment	Property management division -Planning, design and traffic flow Infrastructure Department City Police
MSME Development		Partnerships with development agencies		Thriving MSMEs Job creation	Developmental agencies
Tourism		Upgrade and develop tourist attractions – Van Ryhn dam and performance arts incubation centre	N\$ 1 000 000.00	Improved infrastructure	Investors Financial institutions
	2025/2026				
		Windhoek Economic Development and Investment Forum based on Windhoek's development community, was identified, which will seek to bring various stakeholders together, such as Council, property owners, academics, businesses and public sector agencies, to discuss matters of concerns and make solid recommendations that are geared	N\$ 25 000.00	<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. Creating value chains to pool resources and promote joint development priorities	Youth & Social Division -Agricultural producers -business community -academics SE's Council

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
		towards the economic enhancement of the Capital. The Forum will cover citywide economic sectors, suburbs and industries and is becoming more of a critical imperative given the recent extension of the city's cadastral boundaries, which will call for heightened coordination to meet the ever-increasing needs of a rapidly growing city.			
Strategic Pillar as per Strategy: Agriculture and agro-processing		Value chain development of agricultural produce	N\$ 150 000.00	Improved business environment, Food security and livelihoods Improved Gross Value Addition Employment Creation	Youth and Social Division -Agricultural producers Economic Development Division
		Windhoek Economic Development and Investment Forum	N\$ 20 000.00	Improved business environment and livelihoods	Youth and Social Division -Agricultural producers Council Economic Development Division Business community
Informal sector		Implementation of Market Development master plan	N\$3 Million	Improved infrastructure, conducive trading environment and livelihoods	Property management division -Planning, design and traffic flow Infrastructure Department City Police

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
MSME Development		Partnerships with development agencies		Thriving MSMEs Job creation	Developmental agencies
		Implementation of Market Development master plan		Improved infrastructure, conducive trading environment and livelihoods	Property management division -Planning, design and traffic flow Infrastructure Department City Police
Tourism		Review tourism signage	N\$ 600 000.00	To create welcoming ambience	Road authority City Police Urban transport planning
	2026/2027				
		Windhoek Economic Development and Investment Forum based on Windhoek's development community, was identified, which will seek to bring various stakeholders together, such as Council, property owners, academics, businesses and public sector agencies, to discuss matters of concerns and make solid recommendations that are geared towards the economic enhancement of the Capital. The Forum will cover citywide economic sectors, suburbs and industries and is becoming more of a critical imperative given the recent extension of the city's cadastral boundaries, which will call for heightened coordination to meet the	N\$ 25 000.00	<ul style="list-style-type: none"> Strengthened and collaborative local eco-system. Creating value chains to pool resources and promote joint development priorities	Youth & Social Division -Agricultural producers -business community -academics SE's Council

0505

Period	Financial year	Activities	Estimated Budget	Expected outcome/ROI	Interdependencies
Theme: Social Progression, Economic Advancement& Infrastructure Development					
		ever-increasing needs of a rapidly growing city.			
Strategic Pillar as per Strategy: Agriculture and agro-processing		Implementation of value chain development of agricultural produce		Improved business environment, Food security and livelihoods Improved Gross Value Addition Employment Creation	Youth and Social Division -Agricultural producers Economic Development Division
		Windhoek Economic Development and Investment Forum		Improved business environment and livelihoods	Youth and Social Division -Agricultural producers
Informal sector		Implementation of Market Development master plan	N\$3 Million	Improved infrastructure, conducive trading environment and livelihoods	Property management division -Planning, design and traffic flow Infrastructure Department City Police
MSME Development		Partnerships with development agencies		Thriving MSMEs Job creation	Developmental agencies
		Implementation of Market Development master plan		Improved infrastructure, conducive trading environment and livelihoods	Property management division -Planning, design and traffic flow Infrastructure Department City Police

Financial Implications:

Year	Budget required
Year 1(2022-2023)	N\$ 105 000.00
Year 2 (2023-2024)	N\$ 3 700 000.00
Year 3 (2024-2025)	N\$ 3 170 000.00
Year 4 (2025-2026)	N\$ 3 170 000.00
Year 5 (2026-2027)	N\$ 3 000 000.00

507



**MINUTES OF EDD STRATEGIES PRESENTATIONS MADE
TO THE STRATEGIC EXECUTIVES**

14 June 2022

Presentations commenced at 14h48 - Alderman Matthew Shikongo Boardroom

1. ATTENDANCE

In attendance

1. Mr. MG. Mayumbelo
2. Mr. P. Van Rensburg
3. Ms. M. Kahitu-Hijarunguru
4. Mr. P. Johannes, Chief Engineer: Systems & Protection
5. Mr. S. Mutonga, Executive: Financial Reporting and Budgeting

EDD Staff

1. Ms. Z. Steenkamp, Manager: EDD
2. Ms. L. Figaji, Section Head: BD
3. Ms. L. Joodt, Section Head SME D&P
4. Ms. G. Pujatura, Section Head Tourism
5. Mr. O. Thataone, City Tourism Officer: Information Management

Apologies

None

2. WELCOMING

Ms. Steenkamp welcomed the Strategic Executives and those staff standing in for SEs to the session. She explained that the presentation is a result of a request from the SE Forum that took place on 21 April 2022. The SE Forum referred the items on the proposed below economic development strategies back in order for the Acting SE: EDCS to facilitate presentations by Economic Development Division to the SE's, whereafter the strategies be resubmitted after this engagement session.

2.1 Windhoek Economic Development (WED) Strategy.

The first presentation by Ms. Steenkamp focused on the Windhoek Economic Development (WED) Strategy.

Issues that emanated from the discussions:

- Mr. Mayumbelo advised that mobilization is key when doing surveys. He advised that when surveys are implemented, referring to the Agro Processing and Urban Agriculture survey that was proposed as per strategy, EDD should strongly consider bringing in experts in agriculture from Neudam and tap into their expertise, while at the same time running parallel activities aimed at information collection and distribution. Mr. Mayumbelo advised that EDD link up with Mr. Kalundu with regard to the agriculture survey as his Division is planning a similar exercise. He further advised the EDD to consider organizing a one-day urban agriculture cluster session for discussions, presentations, information collection and afford showcasing of products.
- Mr. Mutonga advised that more high impact activities that create visibility be implemented.
- Mr. Van Rensburg stated that the Transport dynamic in Windhoek differs from what is happening in other countries (Windhoek requires a 90% subsidy). The Sustainable Urban Transport Plan still requires more work. He further stated that subsidizing of public transport is costly and the most realistic focus is the NMT approach which does not require as much expenditure.
- Mr. Mayumbelo stated that it is good to plan but it is still good to know what to do when resources become available thus these aspects should not be set aside simply because resources might be a challenge at the current moment.

2.2 Investment Incentive Promotion (IIPS) Strategy.

Ms. Figaji presented the Investment Incentive Promotion (IIPS) Strategy.

Issues that emanated from the discussions:

- Mr. Mutonga wanted to know if the N\$ 23 million that is requested will be spend over the 5-year period of the proposed strategy?
- Ms. Figaji confirmed that Mr. Mutonga's understanding is indeed correct.
- Mr. Mutonga stated that it is doable however the benefits to Council should be clearly motivated.
- Mr. Mutonga further referred to two places in the Local Authorities Act where exemptions and/or permissible rebates are mentioned.
- Mr. Mayumbelo advised that Ms. Figaji make time to ensure that she engages with businesses and not neglect the small businesses. He stated that the perception is that EDD is more about theory than action and advised that the Division change that perceptions and show more practical results.
- Mr. Mayumbelo indicated that because Windhoek (Namibia) is a small market, multi-nationals don't flock to invest in Windhoek. He further stated that the City has had a bad experience with Ramatex in terms of foreign investment. Large rebates we offered, however, the project was not sustained beyond a few years.
- Mr Van Rensburg would like to see the impact / direct benefits of activities proposed to the City.

2.3 Sustainable Tourism Development Strategy.

Ms. Pujatura presented the Sustainable Tourism Development Strategy.

Issues that emanated from the discussions:

- Mr. Van Rensburg advised that Ms. Pujatura disaggregate the Tourism figures in terms of tourist, returning citizens, etc. to be more reflective of what is happening on the ground. He further advised that 2–3-day packages be developed to encourage Tourist to stay in Windhoek. The question the Section must answer is what is special / unique to / about Windhoek.
- Mr. Van Rensburg stated that the strategy is too broad and does not excite one. He would like to see quick-wins.
- Mr. Mayumbelo also expressed the concern that nothing is happening in terms of actions towards developing initiatives to ensure that Tourists stay in Windhoek longer upon arrivals. He stated that there is so much that can be done. Additionally, the fact that CBD is lifeless after knock-off hours and no night life happening is also a concern and challenged the Tourism Section to start looking into reviving the CBD at night and after hours.

2.4 MSME Development Strategy.

Ms. Joodt presented the MSME Development Strategy.

Issues that emanated from the discussions:

- Mr. Van Rensburg generally remarked that the EDD strategies must demonstrate the benefit and cost to Council. He stated that the strategies are too broad.
- He further advised that quick wins (4-5 activities) over the next twelve months should be highlighted.
- Mr. Mayumbelo again emphasized networking with external stakeholders in the media and businesses to ensure what EDD is doing is showcased.
- The meeting concluded that the Items be edited and that the benefit and cost to Council be demonstrated and the items be resubmitted.

Meeting adjourned at 17h50

CITY OF WINDHOEK TOURISM STRATEGY

An aerial photograph of Windhoek, Namibia, showing a dense urban area with various buildings, roads, and green spaces. The city is situated in a valley, with hills visible in the background under a clear sky.

2021 TO 2025

ABBREVIATIONS	iv
1. EXECUTIVE SUMMARY AND INTRODUCTION	1
1.1 Background and Introduction	3
1.1.1 The purpose of the tourism strategy	3
1.1.2 The strategy development process	4
2. THE TOURISM SECTOR	5
2.1 What is Tourism?	6
2.2 Global Megatrends in Tourism	7
2.3 How Selected African Cities Have Successfully Developed Their Tourism Sectors	9
2.3.1 Lessons Learnt from Kigali, Rwanda	9
2.3.2 What Windhoek Can Learn from Nairobi, Kenya	10
2.3.3 Lessons Learnt from Johannesburg, South Africa	11
2.4 The Macro-economic Environment and Tourism in Namibia	12
2.5 Namibia Tourism Trends	15
2.6 What are the National Plans for Tourism?	17
3. TOURISM IN WINDHOEK	19
3.1 Problem Statement: Key Challenges that Windhoek's T&T Sector Faces	23
3.1.1 Water and Tourism	23
3.1.2 Safety, Security and Health and Safety	24
3.1.3 Industry Alignment	26
3.1.4 Other Concerns Raised by T&T Stakeholders	26
4. WHAT COW IS ALREADY DOING	31
5. COW'S STRATEGY GOING FORWARD	36
5.1 SWOT Analysis – Tourism in Windhoek	37
5.2 Identifying Windhoek's Competitive Advantage as a Destination	38
5.3 Strategic Overview and Strategic Direction	41
5.4 Vision, Mission and Values	42
5.5 Critical Success Factors	43
5.6 Strategic Themes, Objectives and Projects	44
5.6.1 Theme 2: Spearhead the Development of a Sustainable Tourism Industry in Windhoek	45
5.6.2 Theme 3: Ensure Customer Focus in the Sector by Improving Windhoek's Value Proposition	46

5.6.3	Theme 4: Maintain and Develop Infrastructure to Support a Growing Tourism Industry in Windhoek.....	48
5.6.4	Theme 5: Improve the Destination Marketing to Attract More Visitors.....	49
5.6.5	Theme 6: Improve Tourism Stakeholder Alignment for Tourism Development	50
6.	OPERATIONAL PLANNING MATRIX.....	51
6.1	Operational Plan	52
6.2	The Planning Matrix.....	53
6.3	Monitoring and Evaluation.....	60
6.3.1	Monitoring & Evaluation Objectives	60
6.3.2	Project Scorecard.....	61
6.3.3	Project Management Report.....	62
6.3.4	Thematic Priority Area.....	62
6.3.5	Evaluation	63
6.3.6	Reporting.....	63
	REFERENCES	64

TABLE OF FIGURES

Figure 1: Tourism value chain	6
Figure 2: Benefits of a thriving tourism sector	7
Figure 3: Global tourism megatrends	8
Figure 4: Global middle-class population.....	9
Figure 5: Namibia GDP growth rate	13
Figure 6: Travel & tourism's contribution to GDP (World Travel & Tourism Council, 2019).....	14
Figure 7: Tourist seasonality 2018	15
Figure 8: Windhoek T&T businesses registered with NTB.....	20
Figure 9: Top tourist attractions in Windhoek (Hartman & Eckert, 2019)	22
Figure 10: Main means of transportation by tourists in Windhoek (Hartman & Eckert, 2019)..	22
Figure 11: Survey results concerning visitor satisfaction (Hartman & Eckert, 2019)	23
Figure 12: Windhoek water demand vs supply.....	24
Figure 13: Crimes against tourists in Windhoek (2016 to Sept 2019)	25
Figure 14: Extract of the City of Windhoek's website, 2019.....	28
Figure 15: SWOT analysis	38
Figure 15: Strategic overview.....	41
Figure 14: Critical success factors.....	43
Figure 19: Impact monitoring framework	61



LIST OF TABLES

Table 1: Theme 1 objectives, projects and responsibilities	45
Table 2: Theme 2 objectives, initiatives and responsibilities.....	46
Table 3: Theme 3 objectives, projects and responsibilities	48
Table 4: Theme 4 objectives, projects and responsibilities	49
Table 5: Theme 5 objectives, projects and responsibilities	49
Table 6: Theme 6 objectives, projects and responsibilities	50
Table 7: Project scorecard	62
Table 8: Project management report.....	62
Table 9: Thematic priority areas assessment tool	63
Table 10: Example of indicators for thematic priority areas	63



APPENDIX

BON	Bank of Namibia
B&B	Bed & Breakfast
BEE	Black Economic Empowerment
CBD	Central Business District
CCTV	Closed-Circuit Television
COW	Municipal Council of Windhoek
COPPS	Community-Oriented Policing & Problem Solving
GDP	Gross Domestic Product
GRI	Global Review Index
GRN	Government
GSTC	Global Sustainable Tourism Council
HKIA	Hosea Kutako International Airport
KPI	Key Performance Indicator
LED	Light Emitting Diode
M&E	Monitoring and Evaluation
MET	Ministry of Environment and Tourism
MICE	Meetings, Incentives, Conferencing and Exhibition
Namwater	Namibia Water Corporation
NDP-5	Fifth National Development Plan
NMT	Non-Motorised Transport
NSA	Namibia Statistics Agency
NTA	Namibia Training Authority
NTB	Namibia Tourism Board
N\$, NAD	Namibia Dollar
OTA	Online Travel Agencies
PPP	Public Private Partnership
RDB	Rwanda Development Board
SADC	Southern African Development Community
SME	Small and Medium-Sized Enterprise
T&T	Travel and Tourism
UK	United Kingdom
UN	United Nations
UNWTO	United Nations World Tourism Organisation
USA	United States of America
USD	United States Dollar
USP	Unique Selling Proposition
ℓ	Litres



1. EXECUTIVE SUMMARY AND INTRODUCTION

1. EXECUTIVE SUMMARY

The Municipal Council of Windhoek (hereafter referred to as "the City of Windhoek", "COW") aims to take up a more active role in the development of a sustainable tourism sector in Windhoek. The purpose of this strategy was to assess the competitiveness of Windhoek as a destination and to develop initiatives that will improve the City's competitive position to attract more tourists and improve visitor satisfaction.

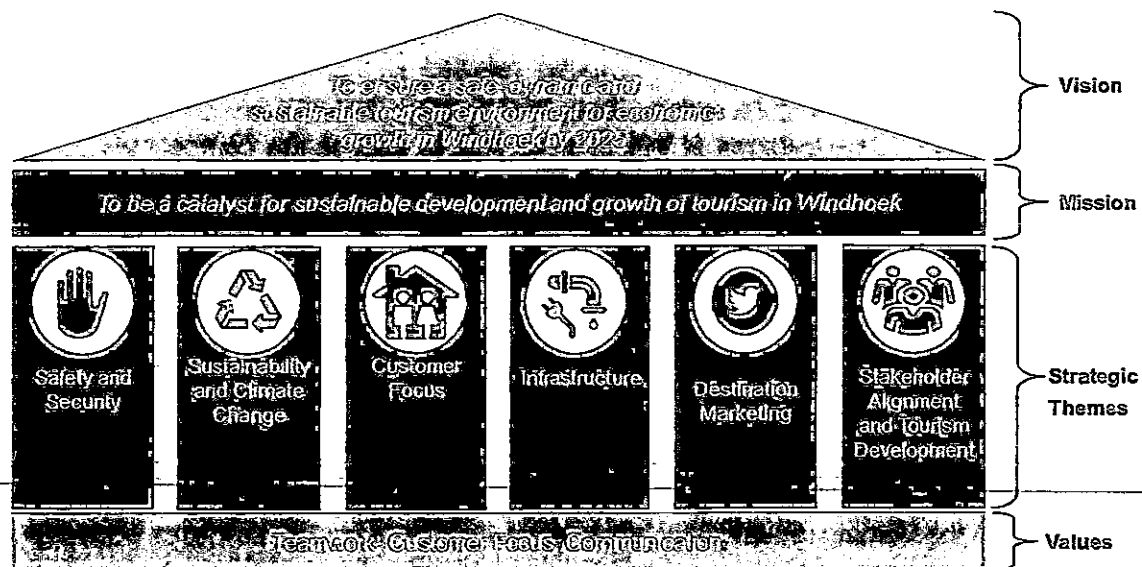
Tourism is a key enabler for economic development and is one of the fastest growing sectors worldwide. The T&T sector creates one in ten new jobs globally. In Namibia, the tourism sector grew by 0.3% in 2019, outperforming overall GDP which contracted amidst a recession (World Travel & Tourism Council, 2020). The Namibian government recognises the sector's potential for growth and contribution to GDP and included it in NDP-5 and through MET's development of specific plans to increase the T&T sector's value proposition. However, the impact of the current Covid-19 pandemic is disastrous particularly for the tourism industry and has caused significant economic losses especially to Namibia and its tourism industry. The Namibian tourism industry will have to transform in order to become more resilient and will have to focus on a strategy of sustainable development in conjunction with disaster risk reduction and climate change.

Despite the growth experienced in the sector before Covid-19, Windhoek has not fully positioned itself as a destination for tourism and finds itself largely acting as a transit city for tourists travelling across Namibia. A local hotelier has stated that leisure tourists have an average length of stay in Windhoek of 1 night, compared to 2 to 3 nights by business travellers and 4 nights by conference attendees, consequently, Windhoek as a city does not benefit as much as it could from tourism. The economic value generated from tourism is wide and far reaching and would improve the livelihoods of the city's residents as it creates opportunities for increased economic activity.

The Windhoek T&T sector is faced with several challenges, the most crucial being that of transforming its tourism products and generating tourism due to the impact of Covid-19, followed by the decreasing availability of water, safety and security of tourists and residents the lack of industry alignment. Several areas for improvement and possible opportunities have been identified. A SWOT analysis was performed, which provides a bird-eye view of the current status of tourism in the Windhoek. Windhoek-based T&T service providers and stakeholders were consulted during the development of this strategy.

Six themes were identified, which are the areas of improvement that COW will focus on over the strategic period. The strategic overview is depicted overleaf.





The strategy is aligned to the COW Transformational Strategic Plan 2017 – 2022 and will support the realisation of that strategy. The entire organisation is responsible for the implementation of this strategy. COW is committed to building networks and engaging with stakeholders to ensure the effective implementation of the strategy.

1.1 Background and Introduction

1.1.1 The purpose of the tourism strategy

This strategy has been developed to identify key initiatives and objectives that should be implemented to better position Windhoek as a destination that attracts more tourists and encourages them to extend their stay in the City. Windhoek is in competition with other destinations in Namibia for tourists and must identify and develop activities, services and infrastructure required to facilitate local tourism. The tourism strategy therefore aims to address the following:

- Who are the tourists that come to Windhoek and how can the Windhoek T&T sector get them to extend their stay in Windhoek and spend more money in the City?
- What are the activities and resources that can be developed to attract more tourists to the City?
- What are the current challenges to developing a sustainable T&T sector in Windhoek and how can the sector overcome them?
- Who are the key stakeholders involved in Windhoek's T&T sector and how can they better collaborate and partner to improve the destination's offerings and competitive position?



The strategy is localised to the municipal area of Windhoek (the Khomas region) and includes the game farms and nature reserves outside Windhoek and any other T&T initiatives in the Khomas region.

1.1.2 The strategy development process

A comprehensive review of tourism development and promotion initiatives in the city of Windhoek were identified through desktop studies and through stakeholder interviews. A total of 28 T&T sector stakeholders were interviewed during the information gathering stage. Most of the interviews were conducted with industry association bodies and only a small number of interviewees were direct T&T suppliers. The interviews were conducted to ascertain the views and experiences of the local T&T stakeholders regarding the strengths and weaknesses of Windhoek as a destination, key opportunities for improvement and the expectations that stakeholders have regarding COW's role in the sustainable development of the sector as a local authority. In addition to external stakeholders, internal stakeholders from other departments in COW were interviewed to identify initiatives that their departments will already implement in line with pre-existing strategies and that will be beneficial to the local tourism sector.

A benchmark desktop study was conducted to identify the initiatives that three similar cities to Windhoek have successfully implemented to facilitate the development of their tourism sectors. Kigali was benchmarked as tourism was instrumental in turning the country around from one that was completely dependent on foreign aid in 1995 to one that only received 17% of its national budget from aid in 2018. Hence Kigali presents a notable case study. Nairobi in Kenya is comparable to Windhoek in many ways in that it is surrounded by several nature reserves, boasts significant historical and cultural assets that it uses for tourism offerings and has a growing "slum tourism" market that Windhoek may learn from. Johannesburg is a commercial metropolis that faces stiff competition for leisure tourists from cities like Durban and Cape Town, like how Windhoek competes with Swakopmund and Etosha and other game reserves for leisure tourists. The key learnings and recommendations that could be implemented in Windhoek have been included as initiatives and activities.

Further desktop studies were performed on to identify the global and national trends in tourism to better position Windhoek in terms of market segmentation and to offer services that tourists have come to expect as standard, such as digital platforms.

The strategy and its initiatives considered the results of the baseline study for the assessment of sustainable tourism development in Windhoek that was conducted by Prof. Dr. R. Hartmann and Ms. E. Eckert of Hochschule Bremen in 2019.

Several COW workshops were facilitated to develop the strategy (high-level statements, strategic themes, objectives and initiatives) after the information-gathering stage.



2. THE TOURISM SECTOR

2. THE TOURISM SECTOR IN A NUTSHELL

2.1 What is Tourism?

The United Nations World Tourism Organisation (UNWTO) defines tourism as “people travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure and not less than 24 hours for business and other purposes”. Therefore, a tourist is essentially anyone who is away from home for more than 24 hours, but less than one year. This challenges the perception that tourism is only limited to holiday activity and means that every visitor (both locals and international travellers) to an area is a tourist.

This broader identification of who constitutes a tourist widens the scope of goods, services and infrastructure required to increase tourism in Windhoek and stimulate the economy.

The tourism value-chain is wide and far-reaching. Tourism involves almost every sector of the economy and creates jobs across the economy. The various amenities and facilities used by tourists create opportunities for enterprise development and therefore create jobs.

The tourism value chain developed by UNWTO and adapted for Namibia is illustrated below.

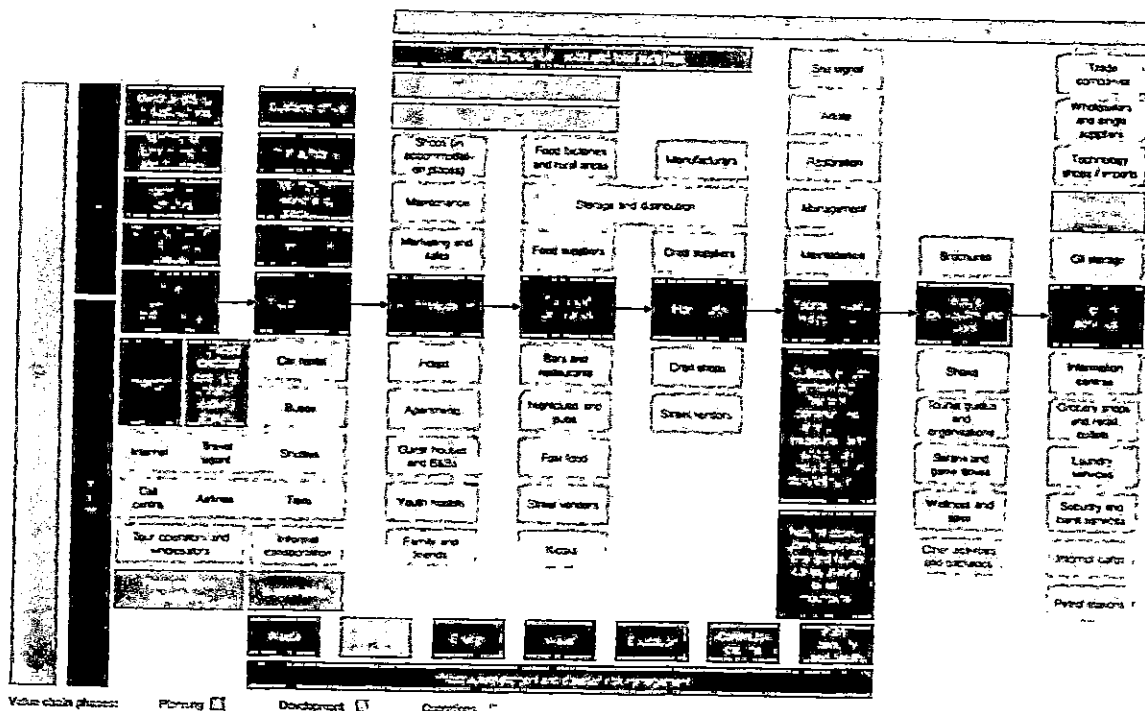


Figure 1: Tourism value chain

Local authorities have several roles to play to enhance tourism. Their primary role is centred on planning and demand forecasting, including providing infrastructural support and undertaking promotional activities. Local authorities are responsible for providing and sustainably managing the resources available to locals and visitors.,

Local authorities can benefit from tourism through the increased economic activity as illustrated in the value chain. Tourists consume basic services such as water and electricity which increases the revenue that local authorities can earn. Local authorities can further benefit from tourism by developing tourism-related products and services to participate in the operational aspect of the value chain and increase revenue.

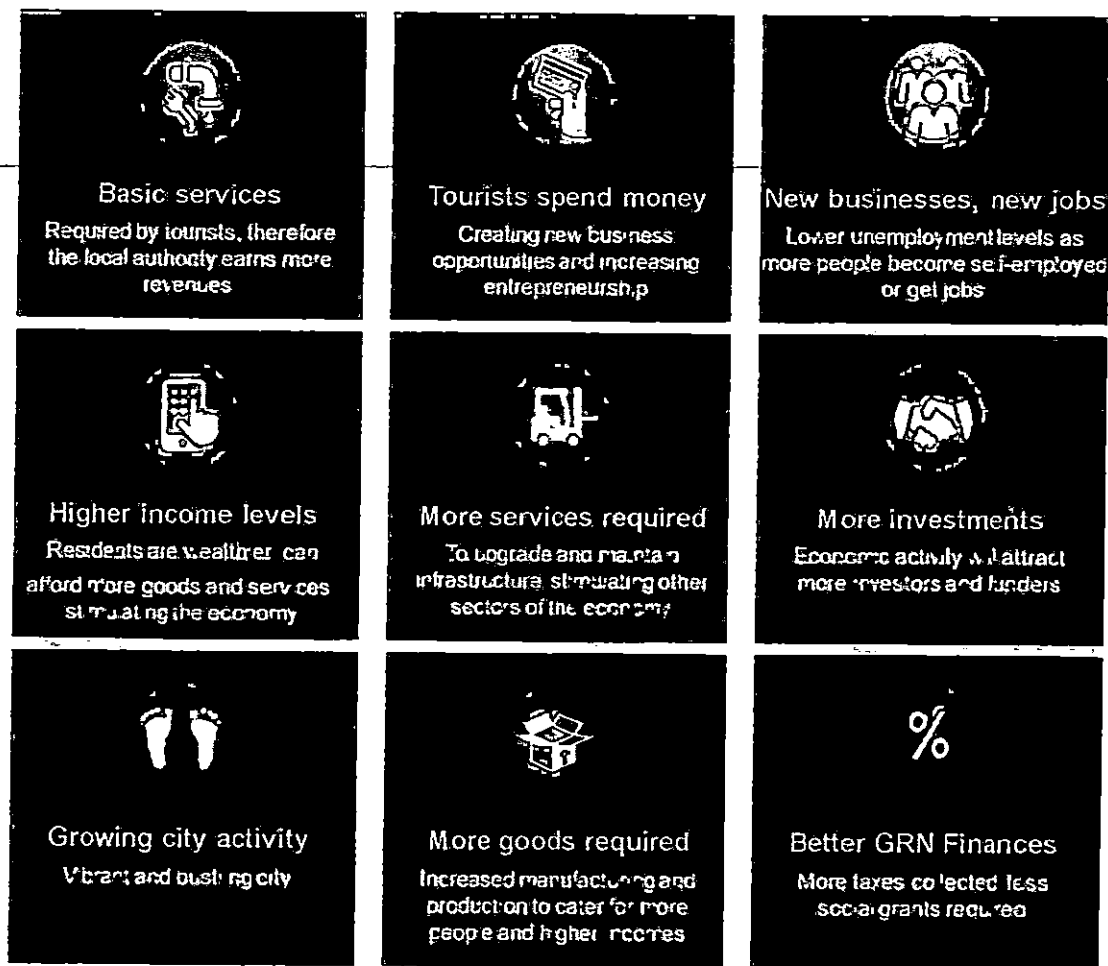


Figure 2: Benefits of a thriving tourism sector

2.2 Global Megatrends in Tourism

Ten key trends have been noted in tourism (Horwath HTL, 2015), which indicate what destinations can invest in to cater for market segmentation.



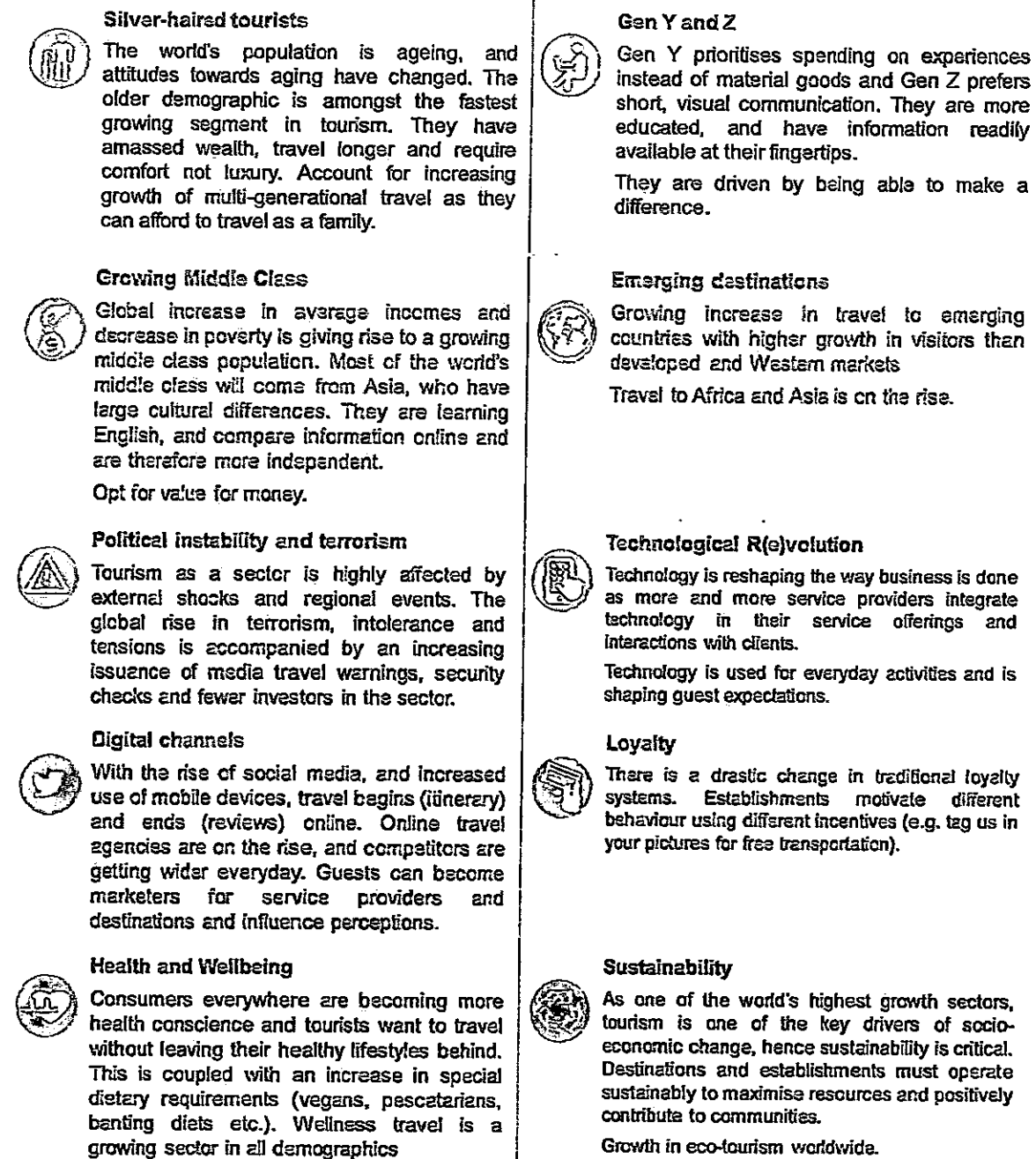


Figure 3: Global tourism megatrends

The middle-class population worldwide is growing rapidly and before Covid-19, it was projected to be 4.9 billion people by 2030. The projection was that most of the rising middle class would come from the Asia-Pacific region. The rise in average income levels would change the profile of the international traveller and therefore their expectations.

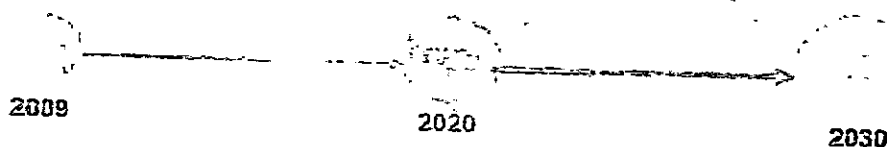


Figure 4: Global middle-class population

Globally, tourism directly contributes to 1 in 10 jobs, and 25% of all net new jobs created in the last five years were within the travel and tourism sector (World Travel & Tourism Council, 2020).

2.3 How Selected African Cities Have Successfully Developed Their Tourism Sectors

A benchmark desk study was performed on three African cities that have successfully developed their T&T sectors to identify what the Windhoek T&T sector can learn from them and implement to make Windhoek more competitive as a destination. The results of the desk study are summarised below:

2.3.1 Lessons Learnt from Kigali, Rwanda

Kigali is known for being a clean, green and safe city. Kigali replaced Windhoek as the cleanest city in Africa and is further heralded as the safest city in Africa and the 11th safest city in the World. Rwanda's cleaning initiatives and the ban on plastic bags are globally well known and have contributed to the country's reputation as a destination that has successfully implemented eco-tourism that preserves the environment and sustainably benefits the communities who receive visitors.

Tourism has been identified as a key economic driver for Rwanda and was instrumental in the turning the economy around from one that was 100% dependent on aid in 1995 to only receiving 17% of the national budget from aid in 2018.

Rwanda has established itself as a luxury and high-end tourist market. Most of Kigali's leisure tourists intend to do gorilla trekking, an activity that is relatively expensive compared to other activities in Africa. In addition to luxury tourism, Kigali has established



itself as a major business hub and as a choice destination for Meetings, Incentives, Conferencing and Exhibition (MICE) in the region.

Kigali's tourism sector was enhanced by the successful implementation of the following initiatives, which Windhoek can learn from:

- i. Rwanda formed the Rwanda Development Board (RDB) to oversee all policies related to the investor experience. The RDB successfully implemented policy reforms that were geared towards improving tourism, including:
 - Creating a business conducive climate – it is easy to do business in Rwanda;
 - Implementing a clear strategy for tourism – Kigali's target tourist segments were clearly defined, and the city positioned itself to attract those segments;
 - Increasing investment in tourism infrastructure development – more than 2 billion United States Dollar (USD) was invested in the sector in 2018;
 - Easy access to Rwanda – Visa-free access to all Africans and a visa on arrival for all other nationalities;
 - Initiatives to encourage longer stay in Rwanda – tourists receive a 30% discount on the gorilla visit permit if they stay in the country for 6 nights or longer; and
 - Incentives for certain T&T businesses – for instance, airlines and shuttles importing tourists are exempt from certain taxes.
- ii. Kigali is known by the international market as Rwanda made significant investments to market and improve the country's image abroad. One such investment is the "visit Rwanda" shirtsleeve that is worn by Arsenal Football Club players.
- iii. RDB undertook extensive marketing campaigns to educate the Rwandan public about tourism and increase tourist acceptance in local communities.
- iv. Locals are being equipped to enhance the visitor experience as Rwanda attracts investment in training and skills development for entrepreneurship and jobs related to tourism.

2.3.2 What Windhoek Can Learn from Nairobi, Kenya

Nairobi has successfully established itself as an attractive destination for the African tourist market. The city is only 15 minutes away from a national park and is, therefore, able to comfortably provide tourists with both a city and safari experience. Furthermore, Nairobi offers several wildlife sanctuaries where visitors can interact with rescued wild animals. Kenya has established themselves as conservation champions by undertaking decisive actions such as that of the Kenyan President burning 100 tons of ivory in 2016.

Nairobi further boasts excellent museums, cultural and historical sites that invite visitors to share in the city's rich heritage. Visitors can include activities like spending the day with



the Maasai people in their ancestral homelands and visiting other villages on their itineraries. The city is further known to offer great street cuisine options and has a buzzing and active nightlife. Nairobi's "slum tourism" market is a growing one as more tourists show an interest in visiting a shantytown in the city and interacting with its residents.

In terms of business travel, Nairobi is a globally accepted choice destination for MICE and was included in the top five MICE destinations in Africa in 2019. This is further supported as several global companies including Mastercard, Heineken, Toyota etc. choose to base their regional headquarters in Nairobi.

Nairobi's success can largely be attributed to the following:

- i. Successfully addressing the risk of terrorism as militant attacks continue to be the greatest risk to Kenya's T&T sector. Law enforcement's preparedness and response to terror attacks are said to have greatly improved since the Westgate Mall attack in 2013 and hotels are increasingly signing up as members of the Safe Hotels Alliance, a global organisation that independently assesses and certifies hotels on their safety and security practices.
- ii. Nairobi offers many safe and reliable travel options including buses, matatus (public transportation) and Uber. Furthermore, the country invested in upgrading its rail infrastructure to accommodate express trains that can be used to travel between major towns in Kenya and to Dar es Salaam in Tanzania.
- iii. The widely accepted and easy to use M-Pesa mobile money dissuades tourists from carrying cash and consequently improves their safety while in Kenya.
- iv. Kenya continues to reinforce its conservation stance, as seen with its rollout of the ban on plastic bags in 2017.
- v. Kenya offers visa on arrival entrance to all Africans visiting the country for 30 days or less.
- vi. Cultural tourism and especially slum tourism have successfully included the participation of local communities in tours. The community interacts with tourists to share their heritage, culture and daily lives and often receive financial support such as investments in their business endeavours from tourists.

2.3.3 Lessons Learnt from Johannesburg, South Africa

Johannesburg is an economic powerhouse that is traditionally considered to cater to business travellers instead of to leisure tourists.

Aside from being a centre of commerce with an established MICE sector, Johannesburg has a vibrant art, music, theatre, dance and fashion scene. Furthermore, the city is rich in history, heritage and culture and offers several cultural tours such including the Soweto township tours and visits to historical sites, museums and cultural villages.



In addition to arts and culture, the city offers exciting food and beverage experiences like wine and craft festivals, street food and culinary workshops. Shopping accounted for 50% of international visitors' spending in 2017, which is to be expected as Johannesburg has some globally renowned malls such as Mall of Africa.

The City of Johannesburg has undertaken the following initiatives to boost tourism:

- i. Implementing various solutions to boost crimes against tourists. South Africa was named as the fourth most dangerous country in the world in 2018, hence making tourists feel safe and keeping them safe is key to sustainably developing the City's T&T sector. One proposed safety initiative is to deploy a Tourism Safety Ambassador program that will train and utilise unemployed youths to keep tourists safe. In addition to law enforcement initiatives, the provision of safe and reliable transportation such as the Gautrain and Uber have contributed to improving the overall safety of tourists.
- ii. South Africa gazetted a Tourism Black Economic Empowerment (BEE) Sector Code in 2015 to transform the tourism sector and increase the participation of previously racially disadvantaged persons in tourism. Enterprises involved in the T&T sector are assessed and scored to encourage companies to procure goods and services from more black-owned businesses. The South African Department of tourism further supports this process by providing a publicly accessible online database of BEE suppliers and the types of goods and services that they provide.
- iii. A Tourism Grading Council was established to benchmark and grade the quality of accommodation establishments and MICE venues according to globally accepted standards. The Council awards stars out of five based on the assessment performed by its accredited grading assessors and shares the results on its website. This Council provides vital quality assurance on tourism products in South Africa.
- iv. Two websites that provide centralised information on where to go and what to do in Johannesburg. Both websites include up to date event calendars and have functionality that enables visitors to plan their itinerary on the site. T&T businesses can register themselves on the sites to increase their visibility and obtain publicity. Furthermore, Visit Joburg has a free app for mobile devices that offers a one-stop-shop that tourists can use to plan their trips and activities in Johannesburg.

2.4 The Macro-economic Environment and Tourism in Namibia

The Namibian economy experienced healthy growth from 2010 to 2015 with an average annual growth rate of 5.7% in Gross Domestic Product (GDP), partially fuelled by the expansion of public debt, private consumption growth driven by real wage increases and private sector expansion, as well as political and economic stability which attracted foreign direct investments. Foreign direct investment and government spending were directed towards large scale infrastructure development. The decline in the construction



sector when the projects were completed had a significant knock-on effect on other sectors, causing more reductions.

Namibia experienced a technical recession in 2017 due to the slowdown in construction and declining commodity prices that negatively affected the mining sector. The recession was prolonged as GDP further contracted in 2018 and 2019.

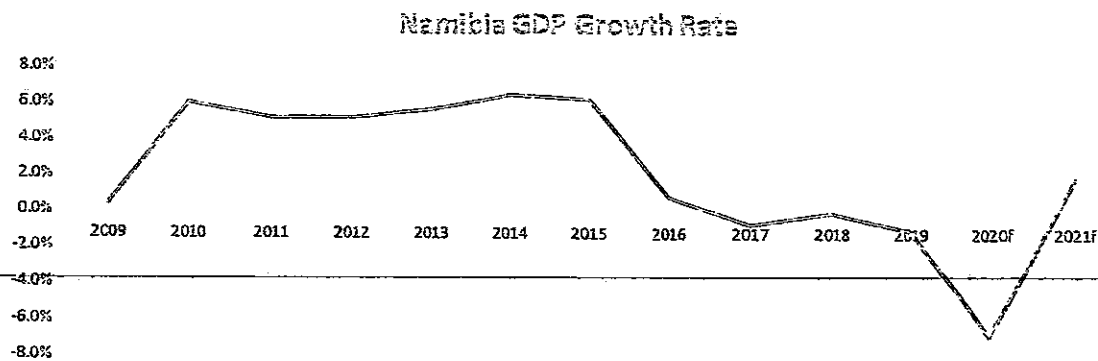


Figure 5: Namibia GDP growth rate

Bank of Namibia (BON) forecasts that the economy will contract by 6.9% in 2020 due to the impact of COVID-19, followed by a marginal recovery of 1.8% in GDP in 2021 (Bank of Namibia, 2020) as part of the economic outlook published in July 2019.

The Travel and Tourism (T&T) sector is expected to be amongst the sectors most negatively affected by the travel bans that were instituted to stop the spread of COVID-19 in 2020. BON estimates that hotels and restaurants will contract by 58% in 2020 and by a further 1.4% in 2021 before gradually recovering. Recovery in the T&T sector is expected to be slow as tourists need to financially recover and become confident that they are safe while travelling. The travel patterns that existed before Covid-19 are changing and safety and feeling safe are key indicators for destination of choice.

Before the outbreak of COVID-19, tourism outpaced all the major GDP activities including mining and fishing and was reported to be the only sector that experienced growth during the recession. T&T had a total (direct and indirect) contribution of N\$ 28.6 billion (14.7%) to GDP in 2019 and had an average growth rate of 0.3% in 2019, which is higher than the average decline of 1.1% in GDP from 2018 to 2019 (World Travel & Tourism Council, 2020).



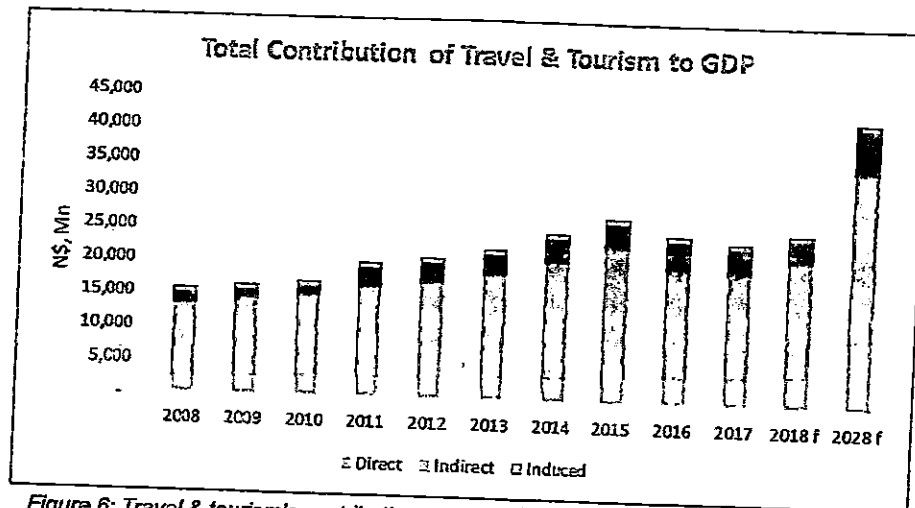


Figure 6: Travel & tourism's contribution to GDP (World Travel & Tourism Council, 2019)

Before COVID-19, growth in the sector was forecasted to be 6.6% per annum from 2018 to 2028 (World Travel & Tourism Council, 2019). Namibia was ranked 34th out of 185 countries in terms of long-term growth of the T&T industry (World Economic Forum, 2017).

Leisure travel is estimated to have accounted for 81% of T&T's overall contribution to GDP in 2019, with the remaining 19% being from business travel. Regional travel presents a key opportunity as an estimated 74% of spending was from domestic spending, and only 26% was from international visitors spending. The tourism sector contributed a total of 114,600 direct and indirect jobs (15.4% of employment) to the Namibian economy in 2019 (World Travel & Tourism Council, 2020).

The COVID-19 pandemic has seen the sector, as well as the world, greatly impacted. WTTC worked closely with sector associations, members and Governments to restart the Travel & Tourism sector. The SafeTravels Protocols and Stamp was launched due to the need for a global coordinated approach to recovery and to achieve effective recovery protocols by developing meaningful action plans that optimise sector-wide recovery efforts..

Part of the protocols include providing the public & private sectors with the insights & toolkits for interaction & implementation to ensure that people are and feel safe. It is paramount to have common rules. Ultimately, a future of travel which is safe, secure, seamless and provides an authentic and meaningful experience to the traveller across the journey is envisioned; one which supports the livelihoods of millions and contributes to sustainable economic growth.

Protocols are published for eleven industries, namely; hospitality, attractions, outdoor retail, aviation, airports, short term rentals, cruise, tour operators, convention centres and MICE, car rental and insurance. The protocols align the private sector behind common



standards to ensure the safety of its workforce and travellers as the sector shifts to a new normal.

Equally, the World Travel & Tourism Council (WTTC) developed different recovery scenarios for the Travel & Tourism sector and the economic impact from COVID-19. It is currently not possible to approximate when the T&T sector may return to the growth outlook that was projected before the outbreak of COVID-19. The WTTC has recommended five measures that governments can put in place to minimise the impact of COVID-19. COVID-19 demonstrates that tourism is a sector that is highly susceptible to external shocks, hence disaster risk reduction management to tourism should be a vital aspect of tourism strategy development.

2.5 Namibia Tourism Trends

Statistics and trends on visitors to Namibia are reported in the annual Tourism Statistical Report published by the Ministry of Environment and Tourism (MET). The latest available report was published for 2018 information.

Namibia received a total of 1,659,762 foreign arrivals in 2018, which is a 3.9% increase from 2017 (2017: 2.1% increase). In 2018, 94% of all visitors were tourists, and the remaining 6% was shared amongst returning residents, same-day visitors and others (Ministry of Environment and Tourism, 2020). The seasonality of tourist arrivals is well spread out over the year, as depicted below.

Tourist Arrival by Quarters, 2018

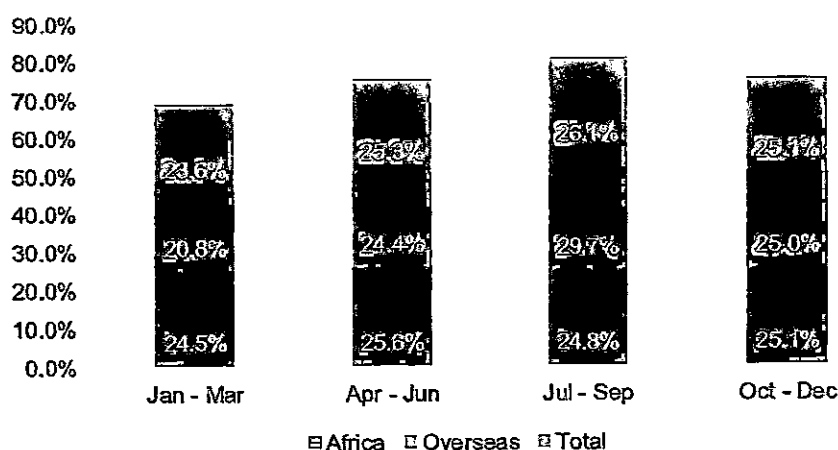


Figure 7: Tourist seasonality 2018

Hosea Kutako International Airport (HKIA) was the point of entry for 25% entrants to Namibia, while 56% and 12% of all entrants were from the Northern and Southern border posts, respectively (30.8% from the North-eastern border posts). The remaining 7% of all visitors arrive through the Trans-Kalahari border post and other airports. Only 28% of



visitors enter Namibia through air travel. This indicates that a high number of arrivals are from the regional market and enter Namibia by road. Angola, South Africa, Zambia and Zimbabwe accounted for four of the top five arrivals. Germany is the only non-African country in the top five at fourth place and Angola remained the number one tourist market with 489,013 visitors in 2018. The top five list is complemented by tourists from Botswana, France, the United Kingdom (UK), the United States of America (USA) and the Netherlands to complete the top ten tourist markets for Namibia. Despite the USA's presence in the top 10 markets, tourists from North America declined by 8.4% in 2018 compared to an increase of 11% in 2017.

In 2019, the top ten overseas markets were Germany, France, UK, USA, the Netherlands, Switzerland, Italy, Belgium, China and Scandinavia. The overseas market largely visited for holiday purposes (57%), as only 10% of this market visited for business purposes and only 8% travelled to visit friends and family.

In 2018, 59% of all visitors were male and 41% were female. Fifty-one per cent (51%) of entrants cited their reason for travel as visiting friends and family. Only 35% of tourists reported visiting for holidays, whilst 12% of visitors travelled for business purposes. The average length of stay was 16 days in 2018 compared to 19 days in 2017.

The increase in the number of visitors from China slowed to a 0.1% increase in 2018, compared to a 16.6% growth in 2017. Despite the slowdown in the number of visitors from China, Asia is a growing source market for Namibia in line with the global megatrends, making it viable for targeted investment.

Sixty-six percent (66%) of visitors from the European market were over 40 years of age and 62% of visitors from North America were above 40 years old in 2018. All in all, 50% of total visitors were above 40 years old in 2018. The global trend of ageing tourists is clearly observable in Namibia.

Air Namibia brought in 41.1% arrivals by flight in 2018, an increase from the 34.4% share in 2017. South African Airways lost ground by carrying 21.9% of visitors arriving by flight, a fall from the 30.1% reported in 2017. Qatar Airways carried the third-highest visitors arriving by air with a market share of 8.6% in 2018.

The arrival statistics provide insight on how COW might position and effectively market Windhoek as a destination, such as:

- Promoting Windhoek to regional tourists, and not only international visitors;
- Promoting Windhoek at the border posts (the North in particular) and not only at HKIA;
- Increasing activities, facilities and amenities that appeal to the growing Asian market;



- Catering to the needs of visitors over 40 years old such as investing in activities that appeal to the multi-generational travel market; and
- Marketing on airlines that bring in a large share of visitors to Namibia.

2.6 What are the National Plans for Tourism?

The Southern African Development Community (SADC) developed a protocol on the development of tourism which recognises tourism as a priority sector for Southern Africa. SADC has identified tourism as a vehicle for sustainable development for the betterment of livelihoods in the region. SADC is cognisant that tourism can be a powerful catalyst for inclusive economic growth if properly harnessed and carefully developed and urges member states to improve their quality of service, safety standards, and physical infrastructure as a means of attracting tourists and investment to the region.

Locally, tourism is pegged as a sector that has the potential to contribute to Namibia's long-term economic success and is included under the pillar of economic progression in Namibia's Fifth National Development Plan (NDP-5). NDP-5 includes a goal to attain structural transformation through value addition, part of which will be achieved by leveraging the potential of tourism in Namibia. The Government (GRN) aims to achieve growth in the sector by increasing awareness and marketing, facilitating investment in infrastructure and supporting the diversification of tourism products. MICE and cultural and creative sectors within tourism have particularly been noted as areas for possible diversification, although the industry has been transformed by technology due to the impact of Covid-19, and the latter needs to be endorsed.

Due to Covid-19, many businesses have learnt to meet via Zoom, Microsoft Teams, Skype and many other platforms. Online webinars, conferences etc. have become the new lifestyle and will continue as such. This will have a negative impact for the MICE industry, hence upgrading the technology that is offered in existing venues in order to host online meetings and events should be considered in the future.

MET developed the National Tourism Investment Profile and Promotion Strategy 2016 to 2026 to develop and implement strategies that will improve Namibia's competitiveness as a destination. MET recognises that continuous investment in the sector (infrastructure, services, marketing, training etc.) is required to remain competitive. The policy acknowledges that both the public and private sectors play important roles in improving the sector's efficiency, skills development and the quality of service provided. MET further aims to improve the benefits that local and indigenous communities receive from tourism.

The tourism investment strategy identifies nine core growth targets, many of which could be implemented in Windhoek. The identified subsectors for growth are as follows:

- a) Wildlife tourism;
- b) Trophy hunting tourism;
- c) Coastal tourism;



- d) Community based tourism;
- e) Cruise tourism;
- f) Circuit development/ route development model;
- g) Luxury affordability;
- h) MICE tourism; and
- i) Medical tourism.



3. TOURISM IN WINDHOEK

3. TOURISM IN WINDHOEK

As of September 2019, a total of 1,766 Windhoek-based T&T businesses were registered with the Namibian Tourism Board (NTB).

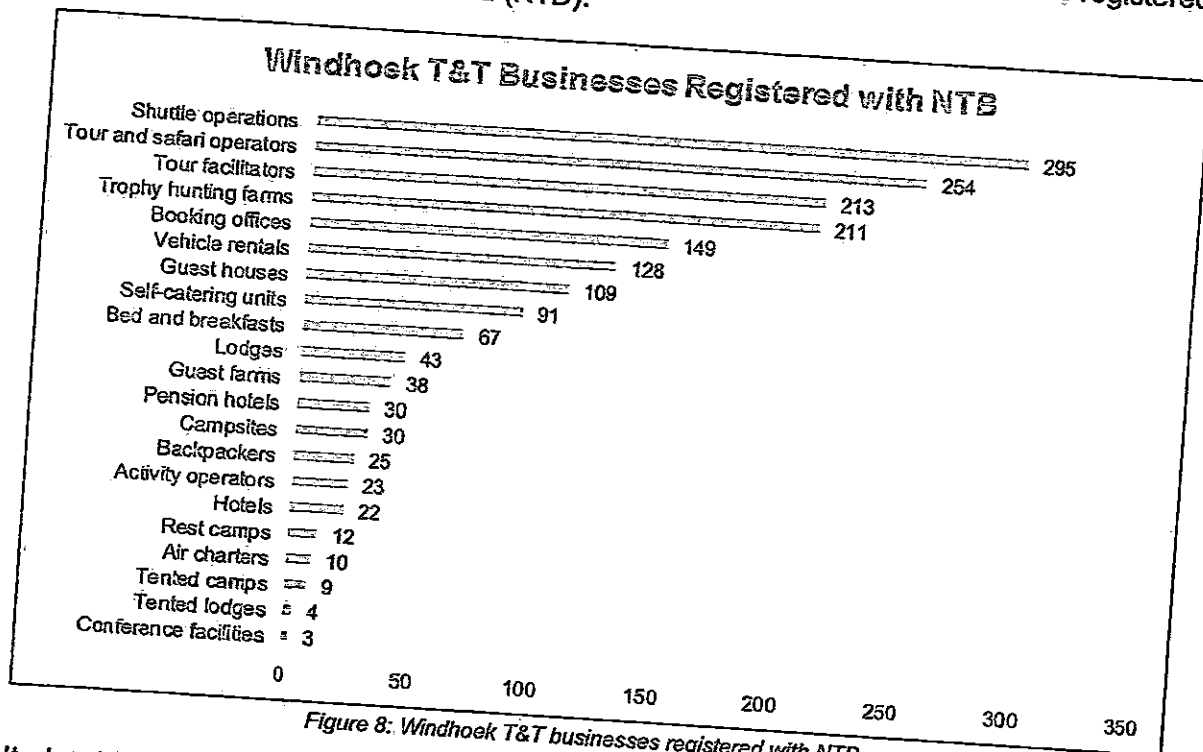


Figure 8: Windhoek T&T businesses registered with NTB

It should be noted that some of the organisations registered in Windhoek have head offices located here, however, they operate elsewhere.

Of all Windhoek T&T businesses that are registered with NTB, 39% are accommodation establishments, 24% are vehicle rental and passenger transportation companies and 29% are activity and tour operators and facilitators. Bed nights in Windhoek are estimated to exceed 550,000 beds and the average occupancy rate is 60% which shows that Windhoek can accommodate more visitors. The highest occupancy rates are between August and December. Almost half of all accommodation establishments indicated occupancy rates of over 70% in November and December. The lowest occupancy rates are between January and March.

NTB does not register eateries and clubs, however, it is estimated that there are 42 clubs, 280 restaurants and 51 coffee shops in Windhoek.

In addition to registered businesses, many T&T businesses that are operating but are not registered with NTB. Over 300 accommodation providers in Windhoek are registered on Airbnb, 125 of which are classified as houses. Furthermore, NTB is unable to regulate



Online Travel Agencies (OTA) such as Booking.com and Expedia as they are international internet-based organisations that are not registered in Namibia.

More than 90% of tourists who arrive by air land at HKIA (Ministry of Environment and Tourism, 2020), however, the T&T stakeholders who were interviewed indicated that tourists are spending less time in Windhoek and increasingly use Windhoek as a gateway city. Key reasons cited are that there are few activities to keep tourists busy and that the operating hours of most businesses are limited. Changes in flight schedules have exacerbated this trend as more flights land at 07h00 and depart at 19h00, making it easier for tourists to leave Windhoek immediately after landing and drive into Windhoek on the day of departure. Tourists who opt to stay in Windhoek often do so on their last night, by which time they have exhausted their budget and thus have less money to spend in Windhoek.

Business travel is commercially relevant to Windhoek as it has the potential to result in investment and increase foreign direct investments in Namibia in all sectors. Hence business travellers should be catered for and not neglected.

Review Pro is a tool that aggregates the guest ratings of accommodation establishments from online feedback platforms to generate a Global Review Index (GRI). The scores take both the quality of the establishment and the quality of service provided into account. Namibia has historically been awarded a GRI of 83% to 86%, which indicates that Namibia's accommodation facilities are generally globally competitive. Therefore, the availability and quality of accommodation is not a constraint in growing tourism in Windhoek.

A survey conducted in 2019 on tourists visiting Windhoek provided the following insights into how tourists experience Windhoek (Hartman & Eckert, 2019):

Kristuskirche was the top attraction for the survey respondents, with four of the top five attractions being near one another in the CBD. Katutura was the fifth most visited attraction overall; however, it was the top attraction for African tourists.



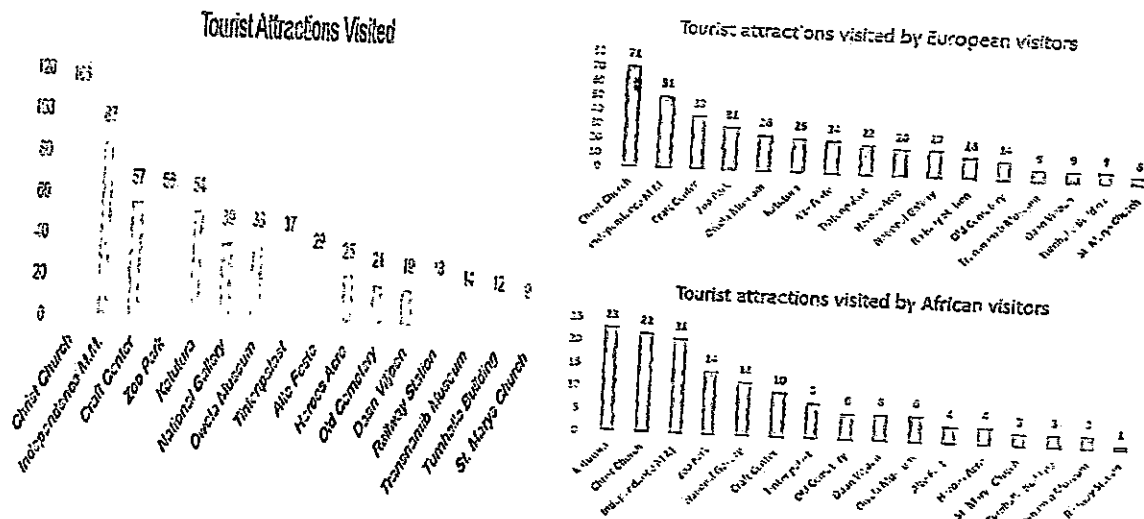


Figure 9: Top tourist attractions in Windhoek (Hartman & Eckert, 2019)

The most frequent means of transportation for tourists have high CO₂ emissions as 60% of visitors use their own car or a rental. Given two main means of transportation, 45% of tourists indicated that they also walk to get around. Overall, only 24% of tourists reported using low-impact mobility to get around Windhoek.

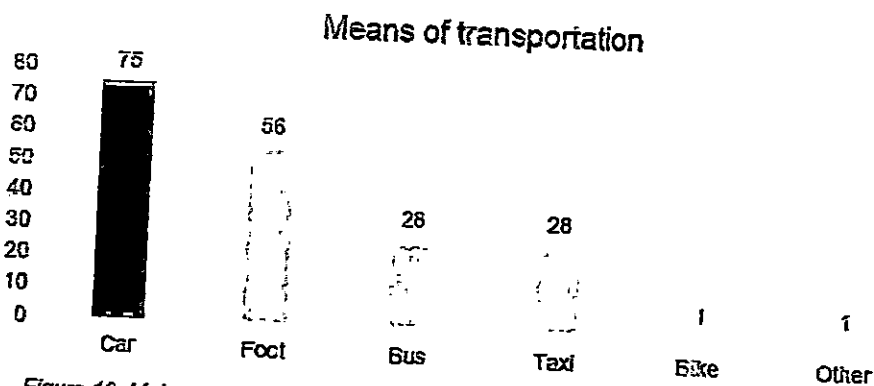


Figure 10: Main means of transportation by tourists in Windhoek (Hartman & Eckert, 2019)

The overall perception and satisfaction that tourists have about Windhoek as a destination is good, at an average score of 3.76, 5 being the highest.



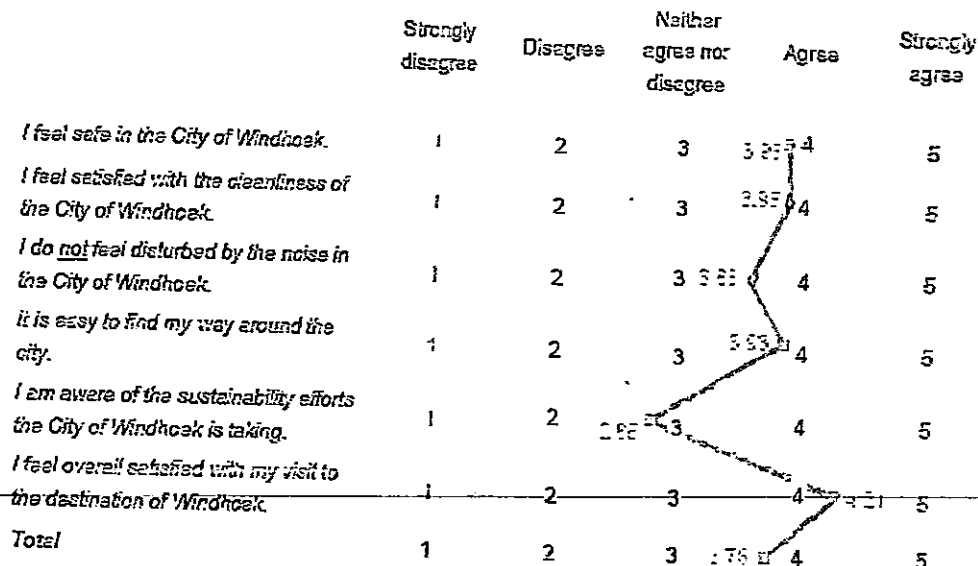


Figure 11: Survey results concerning visitor satisfaction (Hartman & Eckert, 2019)

The survey identified areas for improvement, particularly the promotion and communication of cultural and historic heritage sites, and the involvement of residents in tourism activities.

3.1 Problem Statement: Key Challenges that Windhoek's T&T Sector Faces

Namibia receives a growing number of foreign arrivals each year, with 1.6m foreign arrivals reported in 2018 of whom 400,000 (25%) arrived via HKIA. The Namibia Statistics Agency (NSA) reported that the Khomas Region has the highest annual population growth rate of 3.9% (Namibia Statistics Agency, 2016), which is attributed to high birth rates and urbanisation. Hence, Windhoek is receiving a growing number of residents and visitors each year which points to the need for constant investment to upgrade and maintain infrastructure for the provision of basic services to the growing population. Certain key resources have already been noted to be under strain and could cripple the T&T sector if not properly mitigated.

3.1.1 Water and Tourism



The water crisis and its impact on tourism

Windhoek currently faces water shortages due to the prolonged drought which has resulted in low dam levels. Should COW be unable to provide consistent water supply throughout the day, tourism will suffer severely as tourists expect water to be supplied without disruptions. Restrictions would lead to cancellations, a decline in bookings and intour operators designing their itineraries to exclude an overnight in Windhoek thereby resulting in fewer tourists spending time in Windhoek. There is a need for a disaster risk



plan to assist accommodation establishments and protect tourism in Windhoek should there be water restrictions.

Seventy per cent (70%) of Windhoek's potable water is supplied by the Namibia Water Corporation (Namwater) who have indicated that they were unable to meet Windhoek's water demand and could only supply a fraction (30%) of the total demand before the rainy season in 2019.

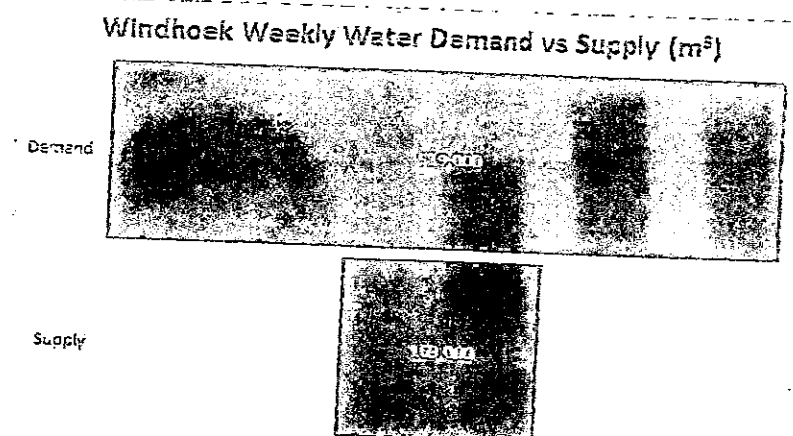


Figure 12: Windhoek water demand vs supply

COW implemented penalty tariffs for high water usage in 2019, however, only a few households in Windhoek had sufficiently reduced their water usage in 2019.

Interviews and surveys that were conducted with accommodation providers in Windhoek reflected that only 50% of respondents have an existing emergency contingency plan in the event of a "day zero" scenario like Cape Town (Liebenberg, 2019 Draft). This indicates that the hospitality industry is largely unprepared to mitigate and minimise the potential impact of water restrictions on guests, despite it being likely to materialise with the water restrictions.

3.1.2 Safety, Security and Health and Safety



The status quo and perception

T&T stakeholders who were interviewed have stated that there is a general perception by both residents and visitors that Windhoek is not a safe city. Perceived danger reduces the amount of activity offered and the level of participation and turn-out at events.

Stakeholders are under the impression that petty crime is rising, particularly crimes against tourists, and are concerned that tourists are an attractive target for criminals. Crimes against tourists often go unpunished as tourists do not stay long enough in Namibia to face the accused in court, as required by Namibian law. Consequently, few offenders are convicted for their crimes, which encourages them to keep committing crimes against tourists.



Stakeholders have relayed experiencing crimes targeted against tourists, such as car break-ins and slashed tyres in areas frequented by tourists. T&T stakeholders have reduced T&T activities in these areas to keep tourists safe, which is ultimately not in the best interests of the communities who operate in the affected areas.

Windhoek City Police provided the following statistics of crimes against tourists that were reported in Windhoek from 2016 to 22 September 2019 to ascertain the accuracy of the perceived increase in crimes against tourists.

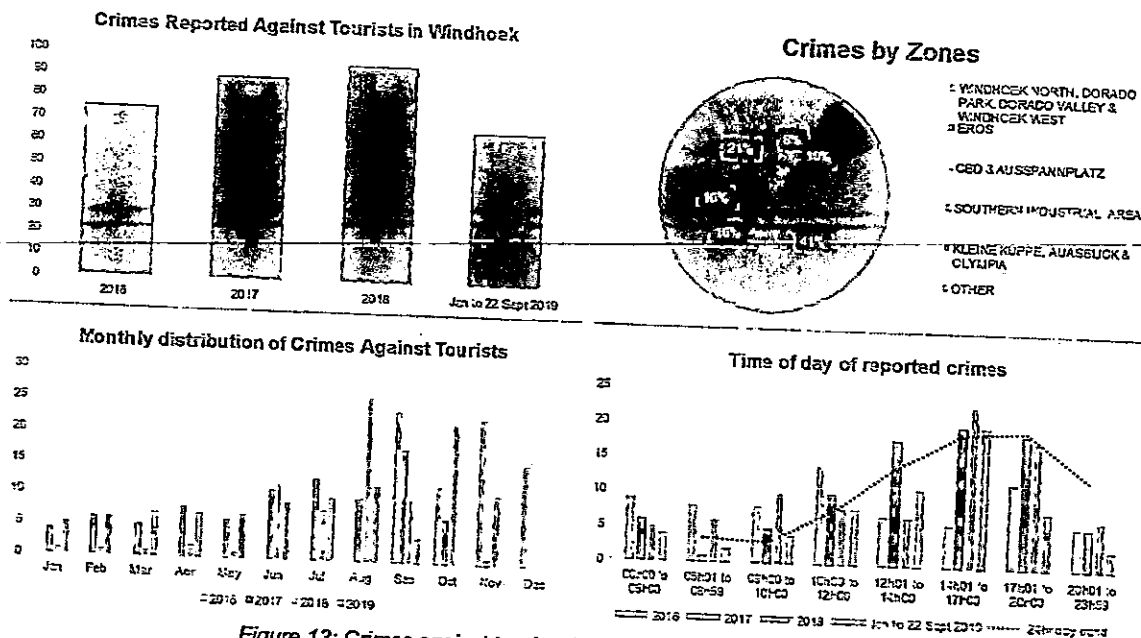


Figure 13: Crimes against tourists in Windhoek (2016 to Sept 2019)

The statistics confirm that the annual reported crimes against tourists have been steadily rising over the past four years. In 2018, 62 crimes were reported from January to September, which is lower than the 67 reported in 2019, and indicates that the overall number of crimes committed in 2019 may have exceeded those in 2018. More crimes occur during the tourism peak season when Namibia receives more international visitors. Forty-one percent (41%) of all crimes against tourists were reported in the Southern Industrial area. Theft out of motor vehicles and theft constituted 37% and 34% of all crimes committed over the four-year period, respectively. Armed robbery was the third most frequent crime in 2017 and 2018. The statistics further indicate that crimes against tourists peak between the hours of 14h00 and 17h00.

The statistics above provide insights that will assist us in combating crimes targeted against tourists and will guide the measures that COW will implement to improve the safety of tourists in Windhoek.



3.1.3 Industry Alignment



How do stakeholders currently interact with one another?

A recurring opinion is that few stakeholders in the tourism industry are interested in finding solutions together. Surveys sent out by academics, T&T associations and representative bodies in the industry receive only a handful of responses as few stakeholders respond and participate in initiatives in the sector. The Eco Awards platform was the noted exception that reported good industry participation.

The tourism industry in Windhoek is largely considered to be apathetic, resulting in a perceived lack of coordination. The tourism business survey conducted by Burmeister and Partners in 2019 reveals that tourist orientated businesses in Windhoek are not good at marketing themselves. Although 73% of respondent tourism businesses indicated that they had good marketing and sales skills, only 21% had a website. Besides this, only 18% of respondent tourist businesses were registered with an official tourism association and only 15% were graded.

Only 23% of respondent businesses have ever participated in local forum meetings, while only 16% participated in local economic development meetings, 8% in local police forums and only 16% attended or participated in investment conferences or trade fairs (Burmeister & Partners Consulting Engineers; Urban-Econ Development Economists, 2019).

In addition to private sector collaboration, there is a need for the T&T industry to cooperate with local and regional planning authorities to ensure the success of Windhoek's T&T sector. Therefore, COW has a crucial role to play in ensuring stakeholder alignment and sector development.

3.1.4 Other Concerns Raised by T&T Stakeholders

Events and activities

There is not much activity in the city centre after five as most establishments close at 17h00 or 18h00 during the week. On Sundays, activity slows down at 13h00. Tour operators face the dilemma that tourists arriving late or during the weekend have very little to do, worsening the trend of tourists using Windhoek as a gateway city.

Stakeholders have further highlighted that there are no designated tourism economic zones and central places for tourism activity in Windhoek. Stakeholders have suggested the creation of a tourism hub in Windhoek which would allow tourists some independence and encourage them (particularly those on self-drives) to spend more time and money in Windhoek.



Marketing and promoting events and activities

Stakeholders agree that events and activities are not sufficiently marketed and are hard to find. Windhoek is lacking one central and visible place where tourists can get information about activities in Windhoek. Stakeholders agree that COW has an important role to play in marketing the activities and events in Windhoek and the surrounding areas, on a central platform. Most events are currently advertised in the newspapers; however, few tourists buy newspapers while in Namibia. Furthermore, a few stakeholders are concerned that road signs and signage to places of interest are insufficient, not optimally placed and not as visible as they should be.

The tourism information office is not optimally located and is hidden away in the municipality. The container at the Hilton Hotel parking lot may lead to confusion as it is no longer functional but is still branded as a tourism information desk.

A grading and registering system for the tourism establishments and services needs to be implemented as an income stream for the City of Windhoek. The process can be linked to the Certificate of Fitness and can incorporate sustainability and climate change, reflecting the City as a city that is progressive and contributes to climate change, thereby assisting with the accreditation of Windhoek as a sustainable destination.

Tourism distribution channels and marketing: Tourism distribution channels link the tourist with the tourism attractions/ businesses. Tourism distribution channels are also referred to as intermediaries (middleman). Traditional tourism distribution channels include travel agencies and tour operators. Newly developed tourism applications have changed the structure of the tourism system. The latest technology advancements now enable tourists to directly communicate with tourism attractions/businesses when doing business transactions. Thus, for COW to compete within the tourism space, it is important to stay updated with the latest travel applications that influence tourists' behaviour.

Tourism-orientated businesses in Windhoek lacked appropriate digital marketing and connectivity. Only 21% of tourist orientated business had websites and only 50% had business emails. In addition, only 17% of accommodation establishments were promoting themselves through Airbnb (Partners, 2020; Burmeister & Partners Consulting Engineers; Urban-Econ Development Economists, 2019). The lack of websites and digital marketing in this industry is of grave concern as this is an industry that relies heavily on digital media platforms to promote itself. Many tourists investigate their options and make online bookings.

Destination marketing embodies the concept of collaborative marketing and coordination between different stakeholders to achieve a single goal, mainly to increase the number of tourists and their spending impact on an area as a whole.

However, Windhoek can only be successfully marketed as a destination attraction if all



intertwining elements pertaining to the City's tourism system are in place and fully functioning. This includes the number one marketing tool that tourists use to learn more about a certain destination - the official website.

The current Namibian Tourism Board website (<http://www.namibiatourism.com.na>) has limited information about Windhoek and has technical difficulties on the pages that should promote Windhoek, such as clumsy layout and photos that do not load. This type of occurrence might dissuade potential tourists from visiting Windhoek as it suggests a lack of professionalism and the ability to provide a good tourist experience.

COW needs to enhance its online presence which includes **upgrading the website** and incorporating more **interactive features** into its design. There is a need to promptly address **access to tourism information** with the COW website. The current website does not possess the necessary appeal to keep tourists intrigued but is rather basic, as illustrated below:

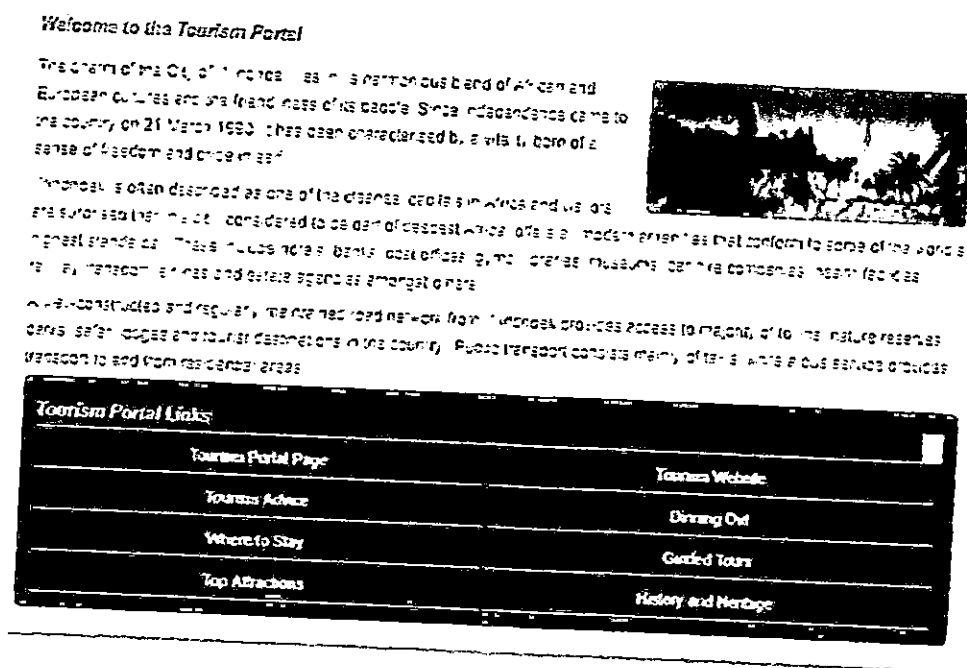


Figure 14: Extract of the City of Windhoek's website, 2019

In addition, it was found that Windhoek has good signage in general, but that the tourist information office near Post Street Mall is hidden away in a corner, whilst the office near the Hilton Hotel is currently being obscured by construction work taking place in the area.



It is proposed that the **tourism information centre be relocated** to an area where it is more visible to visitors.

Furthermore, it was found that the tourism information office needs better signage to make it more visible. Windhoek has well-located and visible signage; however, some **signage will have to be reviewed**.

Educating the public and raising awareness

Several stakeholders have opined that the Namibian public does not understand the dynamics of tourism, its impact on them, the economy and the role that they can play in the sector. Tourism affects everyone in the economy and stakeholders have identified a need to educate the public and raise awareness about tourism so that residents can be more open to participating in tourism and be friendlier and more patient when interacting with tourists. Buy-in from the public will allow more T&T activities and sites to be developed in suburbs away from the CBD and in informal communities, allowing those communities to benefit from the opportunities that the sector provides and to possibly act as brand ambassadors for Windhoek as a destination.

Visitor guidance and education

The strategy should instil professionalism in the management of guided tourism. Tour guides can serve a primary source of educating visitors on the local expectations and cultural shocks.

Registration and compliance

There is no centralised department to advise or assist new business owners with the registration and compliance requirements for new tourism-related enterprises, which is a barrier to entry that negatively impacts the extent which the local community can participate in tourism. T&T businesses are required to comply with the Namibian Companies Act, tax laws, local authority regulations and with NTB requirements. Stakeholders have further commented that the regulations are onerous and consist of administrative red tape which does not encourage participation in tourism. An accessible and centralised location for dispatching information, such as a website would stimulate more entrepreneurship in the sector.

Maximise existing infrastructure

Promote touristic transportation as a product, e.g. specially designed buses that are tourist friendly and only geared towards tourist needs/ hotspots/ destinations.



Capitalise on Windhoek's untapped potential

Windhoek's unique geology: The City presents an interesting geological setting that also, to a large extent, influences the settlement and development patterns. Promotional activities should be geared towards fostering an undertaking of key geological features including springs, mountains, and the mineralogy of the area. Windhoek is blessed with natural infrastructure and designing tourism activities based on its natural setting (e.g. hiking trails) could enhance the unique value proposition and attract visitors.

Biological resources: The Windhoek locality presents an interesting plant diversity which largely remains un-explored. Illustrating local tourism that is tied to plant diversity could be of interest to academics from a research perspective and to plant fanatics and conservationists. An example is the Aloe plant which is of medicinal significance and is connected to the social fabric of Windhoek.

History and cultural heritage: Windhoek remains an epitome and melting point of various cultures and presents an interesting fusion of Afro-Euro traditions. Hence cultural diversity could be an interesting selling point from a marketing perspective. Oral history has an immense potential and could be of interest to those seeking a thorough understanding of the Namibian society on the go.

Mechanism for Review

The strategy should prescribe a mechanism for review. As an action, there should be a dedicated research and development desk focusing on the visitors' experience. For international visitors, HKIA could be a good place to reach visitors and gain an insight on visitor experience.



4. WHAT COW IS ALREADY DOING

4. WHAT COW IS ALREADY DOING THAT WILL IMPROVE TOURISM IN WINDHOEK

COW has identified several other initiatives in other strategies that will benefit Windhoek's tourism sector. The initiatives primarily relate to the investment in infrastructure to ensure that residents continue to receive basic services in Windhoek. COW also aims to improve the public transportation system, improve the flow of traffic and the ease of access for pedestrians and cyclists.

What City Police is already doing to improve safety and security

COW's safety initiatives are geared towards crime prevention in line with City Police's mandate.

City Police has implemented zonal policing by separating Windhoek into designated zones and managing and reporting crimes per zone which increases visibility, allows for rapid response, ease of monitoring and creates ownership and accountability by police officers.

Crime prevention is further enabled by the police gathering data on crime, analysing trends and appropriately responding to the trends to discourage similar crimes. Involving the community in policing efforts by forming partnerships, working together to solve problems and providing education and awareness is a key component of building trust with the communities and building effective partnerships that solve and reduce crimes.

Using technology such as surveillance, dispatch and monitoring equipment allows law enforcement to increase the speed of response and conclude investigations faster, thereby dissuading crime.

In addition to reducing crime, law enforcement aims to gather enough evidence during crime investigations to increase the chances of conviction. Offender profiling is an important aspect of prevention as it can be used to suppress gang activity and reduce the chances of repeat offenders. City Police analyses the actual crimes committed annually to identify prevalent crimes and high crime areas and set goals for crime prevention and reduction in the next year.

What the Smart Cities and Transport Unit are working on

Planning by the Smart Cities and Transport Unit is primarily focused on gearing Windhoek towards becoming a Smart City. The initiatives that relate to tourism are:

- **Public safety and security** – CCTV Cameras are being installed all over Windhoek to curb crime, including crimes targeting tourists.
- **Wi-Fi access** – COW aims to make Wi-Fi accessible at key areas in Windhoek. This would provide online accessibility for tourists and will enable them to find their

way around, including finding their accommodation, where to eat and any other activities that they may be interested in. Ideally, the Wi-Fi will be free, however, the ICT department is still performing feasibility studies.

- **Open data channels (Internet of Things)** – COW plans to avail general information to residents and visitors which will include:
 - ✓ reviews on restaurants;
 - ✓ information on where to find traditional (or any other) cuisine;
 - ✓ events around town (cycling etc);
 - ✓ identify popular spots for tourists and how tourists can get there safely.

The information from these channels will be used to improve the services provided to residents and visitors.

- **Public transport** – COW aims to promote and increase the use of non-motorised transport (walking and cycling) for residents and visitors. Non-motorised transport is a form of smart travelling. Plans on this include providing rental bicycles, improving the sidewalks and related infrastructure, as well as expanding the roads to include cycling lanes. COW's objective is to encourage people to use public transport rather than their private cars as their main mode of travelling. Plans are underway to make public transport more convenient. For instance, COW aims to improve the reliability of municipal buses with a few initiatives like creating an app that will allow travellers to see the bus routes along with the location of buses and their estimated arrival times. Furthermore, COW wants to increase the number of buses available in Windhoek and ensure that all routes have enough coverage. Additionally, COW is developing a mobile phone app that will enable users to identify parking areas in Windhoek.
- **Land use management** – There is a drive to increase recreational parks and commonly shared public spaces around Windhoek. This includes closing off certain streets on specified days to allow pedestrians and cyclists only.
- **Customer care** – Web portals and apps will be developed and availed to the public to enable them to better interact with us to comment and make suggestions on how COW can improve Windhoek for residents.

The Non-Motorised Transport (NMT) strategy addresses the development of safe routes for pedestrians and cyclists in Windhoek. Tourists currently use pay-and-drop transport (radio taxis) instead of public transport and there is no integration between pay and ride and public transport. The NMT strategy aims to improve access to public transport loading areas and for its integration into the road network and to integrate public transport with walking paths.

The NMT strategy includes long-term plans to create safe spaces for pedestrians and cyclists, which will be rolled out in gradual phases. Certain areas will be closed off to cars and will be used for various activities and events instead. Possible events include closing



off a street and introducing cafes, cycling areas, food carts, local artists and other amenities that people can make use of while walking or cycling.

Solid Waste Management Department initiatives

Solid Waste Management aims to provide a clean environment for both residents and visitors. Many of the visitors to Namibia are from Europe and are health and green conscious. The formal parts of Windhoek are doing well as there is a world-class standard system in place. Most residents are conscious of keeping the city clean as littering is minimal and is mostly only an issue in the informal parts of Windhoek. COW needs to drive a change in people's attitudes and encourage them to look after their environment. As this is a national issue, it needs intervention by the top leadership in government, which the President initiated in 2018. Namibia can learn from Rwanda's success in this regard.

COW's overall strategic plan includes making significant investments in waste management infrastructure such as incinerators that will burn waste while simultaneously producing electricity. The incinerators will increase the capacity of the existing landfill (Kuperberg) and therefore, expand its lifespan. These initiatives can only be implemented in the long-term as they require funding that is not currently available.

The Solid Waste Management department will ensure that Windhoek's solid waste management keeps to the standards of disposal sites as approved by MET through environmental clearance. The set standards ensure that the waste disposal methods used are hygienic and do not pose any threats to residents and that the waste does not pollute groundwater sources.

COW further plans to promote recycling. The whole of Africa only recycles about 5% of waste and Namibia has close to the same ratio. Namibia does not have the manufacturing base for recycling locally with recycling materials being exported to South Africa, therefore a local disposal plant will be beneficial. Namibia should consider banning plastic or introducing more environmental levies as the country does not recycle enough.

Initiatives to supply reliable electricity and stimulate economic activity

COW has identified several initiatives to keep Windhoek lit and provide enough electricity to residents and visitors, including:

- Installing street lighting along the river walks in certain areas like Klein Windhoek;
- Installing high mast lights to improve lighting and safety across Windhoek and assisting City Police with mounting their cameras on the streetlights and powering them with electricity;
- Changing streetlights to Light Emitting Diode (LED) lights which are more energy-efficient and that will enable more streetlights to be installed in Windhoek;



- Investigating the possibility of building renewable solar plants to make Windhoek greener;
 - Considering using the hot springs to generate electricity in the longer term;
 - Providing electricity to the various street markets to enable hawkers and vendors to do business at night;
 - Assisting the ICT department with the free Wi-Fi project by giving them access to the fibre cables to aid in the installation of access points across Windhoek;
 - Electrifying about 1,000 houses (2019/ 2020) to improve the economic activities in those areas;
 - Investigating the feasibility of using solar heating facilities to heat public pools so that they remain open throughout the year; and
 - Improving the Christmas lights to attract people to the city centre at night.
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5. COW'S STRATEGY GOING FORWARD

5. COW'S STRATEGY FOR THE DEVELOPMENT OF SUSTAINABLE TOURISM IN WINDHOEK

5.1 SWOT Analysis – Tourism in Windhoek

Windhoek as a destination has several strengths that should be protected and leveraged to further develop and grow the tourism sector.

Weaknesses are existing factors in Windhoek's T&T sector that are somewhat within the control of T&T stakeholders and that currently hinder the growth and development of a sustainable tourism sector in Windhoek. The Windhoek tourism sector should collaborate to mitigate and reduce weaknesses.

Certain infrastructural developments by COW will benefit Windhoek's T&T sector and create growth opportunities in the tourism sector.

Tourism is a sector that is significantly exposed to external threats (e.g. tourists' perceptions) that are beyond the sector's control and the Windhoek T&T sector is no exception. Although threats are largely beyond the sector's control, they must be identified to enable T&T stakeholders to best position themselves to minimise the impact of the identified threats.

The SWOT analysis provides a bird's-eye view of the status of tourism in Windhoek and is depicted overleaf.



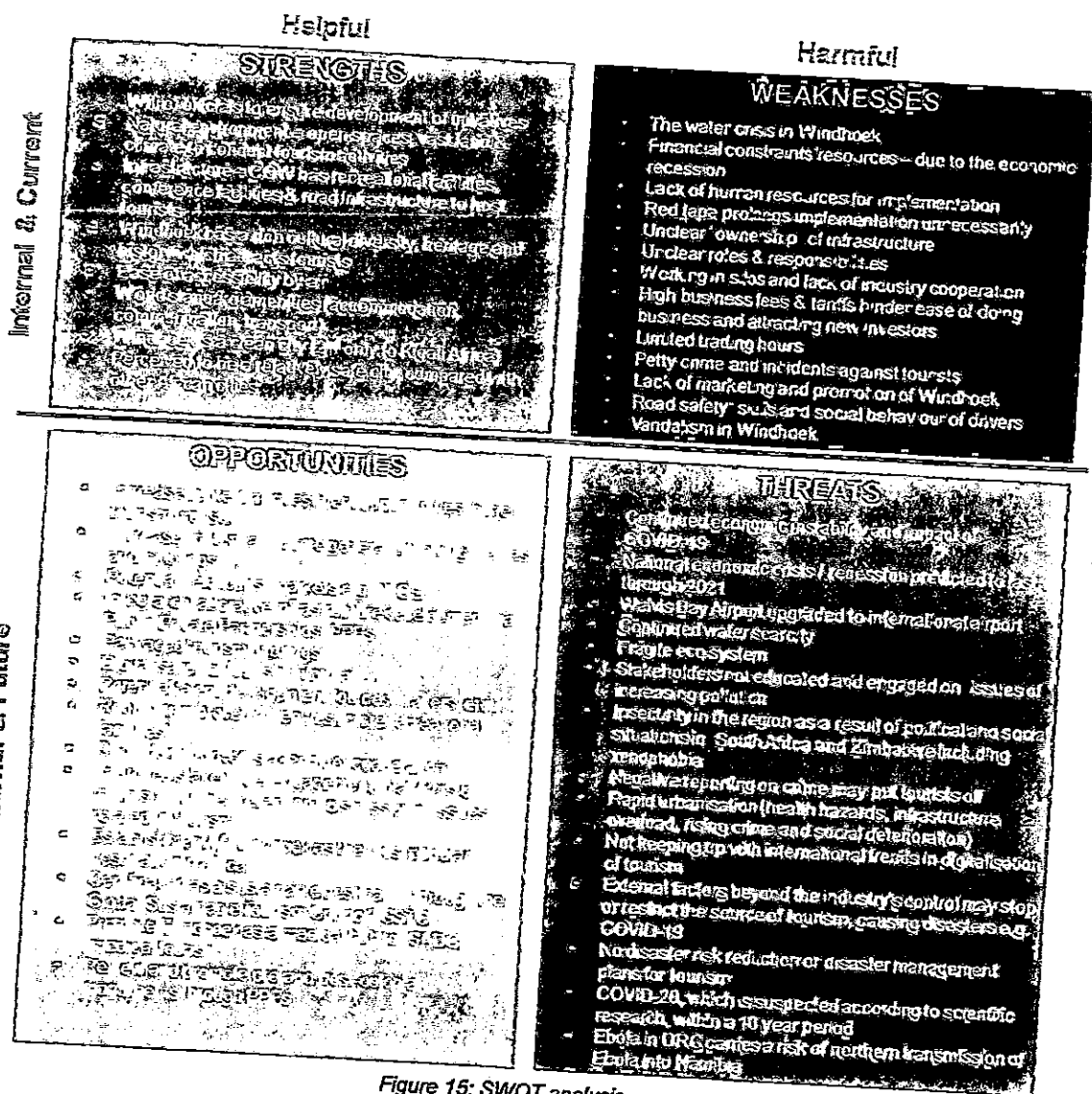


Figure 15: SWOT analysis

5.2 Identifying Windhoek's Competitive Advantage as a Destination

Identifying Windhoek's Unique Selling Proposition (USP) is crucial to developing a sustainable tourism sector in the city. The following USPs are currently identifiable, however, they will be investigated in detail when developing a brand for Windhoek as a destination during the implementation of the strategy. Equally, a program promoting activities that focus on sustainability and climate change needs to be developed to create new selling propositions.



Music, arts, culture and heritage

Windhoek was the location of many of the major colonial historical events since the German occupation of Namibia. Several historical sites and museums can still be visited today. Windhoek has a rich history that can be retold and shared by many of its residents and a buzzing jazz culture which can be traced back to the city's history. The City is well suited to visitors and residents who are interested in learning more about Namibia's history.

Windhoek is a central place where all the cultural groups converge, hence it is possible to position the city as one where tourists can engage with and experience all of Namibia's cultures and traditions. Investing in the development of cultural tourism opens the door for a wider range of people to participate in and benefit from Windhoek's tourism sector by sharing their culture and telling their stories. The following are notable suggestions on how to further develop the Windhoek's T&T sector by using the City's cultural resources.

1. Convert the Alte Feste into a tourism centre which comprises of coffee/food shop with local food, monetary exchange, business centre, tourism guards/ ambassadors for walking tours, using the venue for events, virtual shows and cultural exhibitions;
2. Research and develop cultural culinary tourism for the domestic market;
3. Develop a culinary week ending with exhibitions at the showground;
4. Create a monthly cultural events calendar to promote open spaces within the City; and
5. Digitalise and create virtual reality tours of the museums to be accessed through the City tourism portal.

Establish Namibia as a travelling corridor

Due to Covid-19, many countries are establishing corridors where tourists can travel for a number of days in order to be safe. There is opportunity to develop Windhoek as a corridor by partnering with accommodation establishments, tour guides and restaurants to become safe spots for visitors travelling through Windhoek in order to restart tourism, create employment and generate income.

Regional tourists travelling for medical reasons

Namibia has experienced growth in medical tourism, especially from Angolan visitors who remain the number one visitor to Namibia. Angola has a shortage of doctors and other medical practitioners, with CEML Angola reporting a ratio of two doctors per 100,000 people (2012 statistics, latest). NSA's latest statistics indicate that Namibia has 40 doctors per 100,000 people, a ratio that twenty times that of Angola's. Namibia receives so many Angolan tourists for medical purposes, that some Angolan medical insurers have



arranged for Namibian healthcare providers to attend to their insured members. Therefore, Angola is a viable target group for this type of tourism.

Medical tourists often have a longer average length of stay as they remain in the area to recover from surgical procedures. Windhoek is home to many excellent private healthcare practices and hospitals, including Lady Pohamba Private Hospital which was selected as a winner in the healthcare sector on a global level by the Achievements Forum, which is based in the UK in 2019. Several African nominees were considered, including Ongwediva Medipark and Groote Schuur hospital in South Africa. The facilities are awarded based on the outcome of an independent international evaluation. This competitive advantage is under threat and should be protected as more private healthcare facilities open in the northern regions and many Angolan healthcare tourists opt for them as the facilities are close to the border.

COW should explore partnering with and investing in guesthouses for patients and family who need to stay for more than a week, develop packages and provide tour guiding services to generate income for COW.

People travelling for sporting events

Global trends indicate that consumers are becoming more health-conscious and are taking proactive steps to care for themselves, including exercising more. This trend is reflected in the tourism megatrend of growth in the wellness travel sub-sector (Section 2.2). The growing interest in health and wellbeing is visible in Namibia, particularly in Windhoek, as weekend sporting events become more common. Many lodges on the outskirts of Windhoek have hosted hikes, trail runs and obstacle courses which have attracted several visitors to the city. Several annual events have been established such as the Nedbank City Dash, which received 500 more participants than expected in 2019. Windhoek with its rolling hills and mountainous terrain has the potential to host more sporting activities for runners, hikers and cyclists. Similarly, the Auas mountains are perfect for hosting activities such as ziplining and bungee jumping that appeal to adventure tourists. A sport and adventure marketing campaign for Windhoek should be created.

People travelling for sustainability and climate change

The emerging traveller would like to make a difference and contribute to preventing climate change. Programs should be developed in order for COW and the Windhoek T&T sector to become leaders in sustainable tourism. COW should capitalise on the numerous existing sustainable attractions.



5.3 Strategic Overview and Strategic Direction

The mission signifies the purpose of the development of this strategy and COW's role in Windhoek's T&T sector. The vision signifies what COW envisions for the Windhoek T&T sector and is the overall goal that COW will work towards.

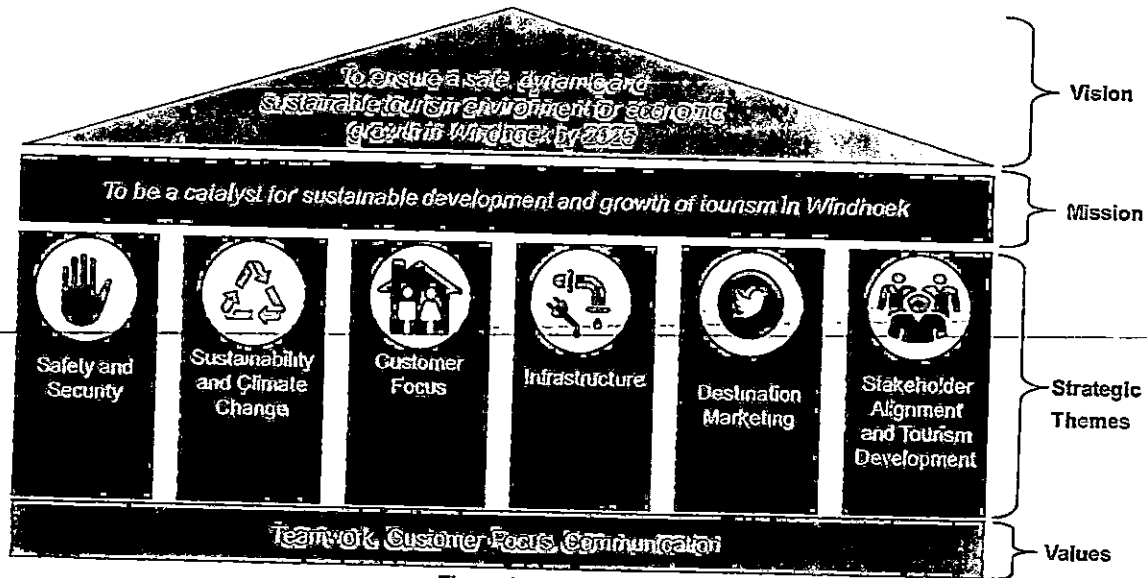


Figure 16: Strategic overview

This strategy is aligned with the COW Transformational Strategic Plan 2017 – 2022 and will support the realisation of that strategy. COW is committed to moving as one organisation in one direction to realise the achievement of this strategy.

COW's overall vision is to realise a thriving, dynamic and sustainable T&T sector in Windhoek that stimulates and contributes to overall economic activity. COW envisions that growth in the T&T sector will create opportunities where value can be generated and realised by different members of Windhoek's community.

COW's purpose is to be a catalyst in the sector by playing an active role to create an environment that encourages the sustainable development of tourism in Windhoek.

The strategic themes are the key areas that COW will focus on over the strategic period to guide the achievement of the vision.



3.4 Vision, Mission and Values



Vision:

To ensure a safe, dynamic and sustainable tourism environment for economic growth in Windhoek by 2025

City: To be a smart and caring city by 2022



Mission:

To be a catalyst for sustainable development and growth of tourism in Windhoek

City: To enhance the quality of life for all our people by rendering efficient and effective municipal services



COW's Values:

The values define who COW is as an organisation and direct COW's standards of behaviours. The values give COW one identity when interacting with one another and with all stakeholders.

- **Teamwork**

"Let's hold hands with all stakeholders and do the right thing for tourism"

- **Customer Focus**

"The well-being of our guests remains our primary concern"

- **Communication**

"We are transparent and innovative in communicating with stakeholders through open dialogue"

City:

- ✓ **Teamwork:** Let's do the right thing, right, together
- ✓ **Customer Focus:** We render friendly, fair, simple, fast and effective service to all residents
- ✓ **Communication:** We are transparent and keep our staff and stakeholders well informed
- ✓ **Fairness and Equity:** We treat staff and stakeholders the same and with respect
- ✓ **Integrity:** We are trustworthy, responsible and honest in all our dealings



5.6 Critical Success Factors

COW identified 21 critical success factors for the development of sustainable tourism in Windhoek. The following factors are necessary to the successful implementation of the tourism strategy:

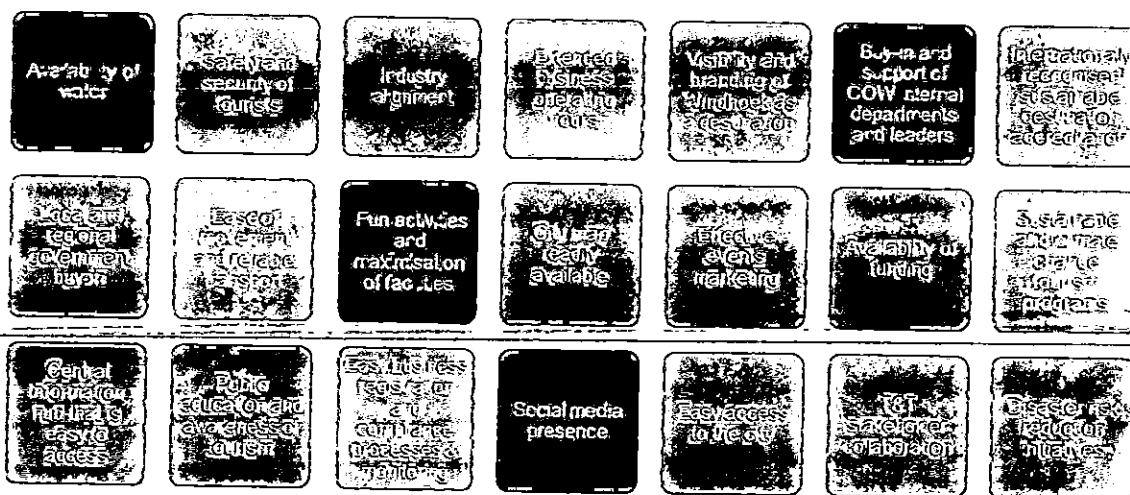


Figure 17: Critical success factors

Secure water supply is critical to developing a sustainable T&T sector as water restrictions will likely diminish accommodation bookings and cause Windhoek to have fewer visitors. Improving safety and creating the perception that Windhoek is safe will increase visitors and participation in events and activities. Tourists and residents should be able to move around easily and feel safe while doing so.

Information on events and activities should be readily accessible, marketed and updated on time to enable tourists to include Windhoek in their itinerary. Extended operating hours will increase the amount of time and money that tourists spend in Windhoek. Furthermore, Windhoek must be branded as a city that offers something unique and enjoyable to visitors and should be marketed to increase its visibility and become a destination that tourists want to go to.

Public education that highlights the potential of tourism and how it is beneficial to local communities will create buy-in from locals and cause them to be more welcoming and accepting of tourists. Locals will identify and pursue economic opportunities for themselves, which will increase T&T orientated entrepreneurship. The increased competition will improve the quality of services provided and increase accountability amongst T&T stakeholders. A business-conducive climate is needed to stimulate the development and growth of Small and Medium-Sized Enterprises (SMEs) in the T&T sector.



Continuous investment in infrastructure is necessary to cater to growing visitor and resident numbers, which requires the buy-in of relevant stakeholders to prioritise and approve the identified investments considering the constrained resources.

Collaboration between T&T stakeholders, COW and the relevant regional and national government bodies is necessary to ensure that the various roles within the sector are effectively attended to and challenges addressed.

5.6 Strategic Themes, Objectives and Projects

Six strategic themes and 11 objectives were identified. The themes are the key areas in which the Windhoek T&T sector must excel to create a sustainable tourism industry, whilst the objectives are the desired outcomes per theme.

Initiatives were identified for each objective and COW will play one of the following four roles in their implementation:

- **Dept. Lead Project** – The Department of Economic Development and Community Services in COW is responsible to lead and implement the project;
- **COW Lead Project** – Another department within COW is responsible to lead and implement the project;
- **Promote and Support Private or Public Sector Project** – The project is something that COW proposes for the development of the Windhoek T&T sector. The project needs to be promoted to the private or public sector for implementation as they need to take ownership and responsibility for leading and implementing the project. COW may contribute by promoting the project, providing funding, infrastructure, zoning or incentives.
- **Support Existing Private or Public Sector Initiative** – The project is a private or public sector initiative that COW may support by providing funding, infrastructure, zoning or incentives.

Theme 1: Improve the Safety and Security in Windhoek

COW aims to improve the safety of residents and visitors in Windhoek and to change the perception that Windhoek is not safe.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Position Windhoek as the number 1 safest city in SADC by 2022	<ul style="list-style-type: none"> • Implement zonal policing • Conduct intelligence led policing • Implement Community-Oriented Policing & Problem Solving (COPPS) 				



Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Educate and create safety awareness amongst tourists and residents of Windhoek	<ul style="list-style-type: none"> Leverage the use of technology to prevent crime Conduct and conclude investigations to reduce crime and increase conviction rates Engage the Ministry of Justice to develop a solution for the timely resolution of crimes against tourists Set annual goals to reduce prevalent crimes and increase overall safety in Windhoek Train City guides to become guards/ ambassadors in order to ensure tourist safety Create a neighbourhood watch program for tourism Run targeted campaigns and roadshows (for product and service providers and residents) 				
	<ul style="list-style-type: none"> Disseminate information on safety and road safety at the airport and on incoming flights to HKIA Share statistics and strategies on crimes against tourists with T&T stakeholders to identify trends and potential hotspots Encourage tour operators to meet and greet their clients at the airport (to discuss safety and other issues) 				

Table 1: Theme 1 objectives, projects and responsibilities

5.6.1 Theme 2: Spearhead the Development of a Sustainable Tourism Industry in Windhoek

The sector should aim to create economic value for all T&T participants in a sustainable manner. The T&T sector should conserve the three pillars of sustainability (economic, social and environmental) by:

- Positively impacting affected communities and preserving their culture, heritage and way of life;
- Preserving and respecting the environment including the local flora and fauna;
- Creating value and opportunities for sustainable economic development.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Encourage investment in sustainable tourism by 2025	<ul style="list-style-type: none"> Reduce business registration process to 2 days in line with the "Doing Business in Namibia" project initiated by MICT led by the Business Registration Section in COW 				
	<ul style="list-style-type: none"> Develop and add toolkits on how to start T&T businesses on the website Implement software and IT solutions (ERP) that allows for digital authorisation to fast track approvals in progress Request EOIs to develop potential tourism products Assign responsibility to follow up on PPP applications and their approval 				



Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Support sustainable tourism activities & relevant capacity building by 2025	<ul style="list-style-type: none"> status Implement an events calendar, regulate events and generate advertising revenue Request administrative fees for the application, registration and the evaluation of events held by external parties (financial and economic - regulation includes environmental aspects) Raise funds (sponsorships and from budget) to host events (economic) Charge fees (participation fees from service providers / entrance fees from the public) for COW's own events (economic) Offer targeted training to BEE and SME T&T service providers (economic and social) Perform post-mortems (M&E) to follow up on the training outcomes on a regular basis for a defined time period (economic and social) Actively and consistently collect data on environmental, economic, social, cultural and tourism management issues. Frequently perform data analysis to discern information and consolidate with stakeholders Set up systems that enable COW to collect data on how COW benefits from tourism related businesses in Windhoek. Frequently analyse data and report relevant information to councillors and other decision-makers 				
Create awareness of the importance of and the benefits of tourism amongst the community	<ul style="list-style-type: none"> Revitalise the teens in tourism campaign Identification and integration of relevant stakeholder groups and introduce a tourism forum to improve communication among the sector and enable cooperation Revitalise the tourism awareness campaign roadshow in collaboration with stakeholders and incorporate schools and tourism students as part of the internships Support and participate in awareness campaigns that are led by external stakeholders (e.g. Wilderness Safaris, the Birds Association, Scientific Society, Museum Association, HAN) 				

Table 2: Theme 2 objectives, initiatives and responsibilities

3.6.2 Theme 3: Ensure Customer Focus in the Sector by Improving Windhoek's Value Proposition

COW will develop tools, products and services to improve how tourists experience Windhoek as a destination.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Invest in digitalisation	<ul style="list-style-type: none"> Develop a tourism App Create a website for Windhoek as a destination Develop e-brochures (digital tourist map) - online PDF Explore appropriate social media platforms (identify the most appropriate platform) 				
Product development	<ul style="list-style-type: none"> Identify and conduct feasibility studies for projects and promote / support 				



Objectives	Projects / Initiatives	Dapt. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<p>tourism opportunities (new & existing adventure activities) that are feasible - own activities</p> <ul style="list-style-type: none"> Develop tourism sites and activities away from the Central Business District (CBD) and in townships and settlements. Example activities include shebeen hopping in Evešne Street, locals can participate in tourism by hosting guests for dinner in their homes whilst storytelling and residents can act as tour guides in their communities; Develop cultural villages and arrange cultural tours to showcase Windhoek's history and heritage; Develop street markets where tourists and residents can eat street food and buy arts and crafts. This could be combined with the development of a tourism hub, beer gardens and food trucks. Zoo park has been identified as a potential location for a tourism hub; Arrange lunch hour performances (music, arts and theatre) in open public spaces with local artists and students to encourage people to spend their lunch break outdoors, spend some money and provide artists with exposure; Engage NHC on ongoing development and promotion of heritage sites Develop Zoo Park and the Parfament Gardens into botanical gardens where picnics and performances can be held; Add cycle and pedestrian lanes in Windhoek and design scenic routes that tourists can take; Outdoor activities such as birdwatching, stargazing, bush sundowners with cocktails, bush dinners or camping under the stars in the Auas Mountains; Develop tour and programs for the local market Organise outdoor activities for families and kids such as scavenger hunts and tree planting events. Events can include activities that entertain kids, for example, face painting, three-legged racing, flying kites, hula hoop rentals, roller skate rentals, jumping castles and a kiddie's pool; Mountain adventures such as bungee jumping, mountain biking, hiking, quad biking, ziplining, abseiling, paragliding and 4x4 tours; Use the natural environment to host sporting events such as trail running, triathlons and BMX races; Implement a tourism levy Implement a certification system for tourism establishments and services Capitalize on the brand created by Windhoek Lager and arrange beer events where people can sample the local beers and craft beers, invite the thriving home craft brewers to participate and sell their wares. Investigate the possibility of arranging tours to breweries in Windhoek; Tourism development geared towards using the hot water springs; Tours focused on sustainability and climate change. Tourism development geared towards using the biological resources whilst preserving them; and Family fun activities like water parks and theme parks. Informal market, informal settlement and shebeen tours (City operated) Promote Township events - COW Develop a tourism hub (tourism office space, traditional food stalls, curios, traditional attire, arts and cultural performances) (PPP) - develop one Increase activities in and around the city (Zoo Park Amphitheatre, Post Street Mall) by motivating for hourly or weekday rates (City rate) City Bus routes (hop on hop off schedule) - develop for tourism Arts performances at the airport to coincide with arrivals & departures Encourage the development of a multi-cultural village (PPP) - where people live and showcase their daily lives City accommodation (PPP) - bungalows, self-catering etc. (COW units) 				



Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
	<ul style="list-style-type: none"> City Tourist Info Offices / booking agent (competes) – approach the Ministry of Environment and Tourism in order to utilise the Alte Feste as a Tourist Centre Development of arts and cultural routes (artists route, Katutura tourist route) – (will also be used for self-drives) Develop a city artist mile/ route Facilitate the promotion of arts in new developments (public arts) – incorporate arts, display and use of local arts etc. for new buildings Develop market segmentation strategies (e.g. way finding project), upgrade the facilities to accommodate the identified segments and develop activities that appeal to the market segments 				

Table 3: Theme 3 objectives, projects and responsibilities

3.3.3 Theme 4: Maintain and Develop Infrastructure to Support a Growing Tourism Industry in Windhoek

It is necessary to make continuous investments in the infrastructure that supports the T&T sector to accommodate the growing population (both residents and visitors) in Windhoek. The T&T value chain (Figure 1) highlights the importance of planning for maintenance and upgrades to infrastructure that is used to supply basic services.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Increase the level of involvement of the Department of Economic Development and Community Services in the town planning process	<ul style="list-style-type: none"> Facilitate assessment of current infrastructure (transport, water, accommodation etc.) Enable activities and policies to be incorporated through all levels of spatial development planning i.e.: <ul style="list-style-type: none"> % allocation in terms of land use to enable work (eco-tourism), live (master planning) and play (urban design, aesthetics and beautification of public spaces) Priority for urban design components and the cost and implementation thereof (e.g. public benches, public toilets) Integrate activities within the necessary planning policies e.g. need for integration of planning policies (town planning scheme) and tourism activities 				
Facilitate the ongoing development of functional water and electricity infrastructure for the future	<ul style="list-style-type: none"> 2030 sustainability concept for water – reduce water demand by 30% Implement daily water management – water marshal training (each building to have marshal) Isolate water leaks immediately 				



Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Advocate for the planning and maintenance of transportation networks by 2025	<ul style="list-style-type: none"> Mandatory implementation of water efficient equipment by businesses including tourism establishments by a specific date (2022): <ul style="list-style-type: none"> Use business registrations and annual health inspections to monitor compliance Participate in the tourism water sustainability forum with external stakeholders Water saving awareness campaigns at tourism establishments Revive water saving tips and provide them to tourism establishments Educate business establishments and the public on water recycling and harvesting options (water marshal training) Increase cycling lanes around the City (NMT) 				
	<ul style="list-style-type: none"> Increase pedestrian walkways around the City (NMT) Build a culture that encourages people to get out of their cars (walk, cycle, public transportation) - LIT Provide bicycles for tourists on lease (e-bikes) Develop an app with real time information on the buses and a USSD code that provides the location of a bus when requested by text Develop additional bus routes during the day - continuous flow of traffic (start with minimal routes) Revamp bus stops - to provide information and earn revenue from advertising 				

Table 4: Theme 4 objectives, projects and responsibilities

3.6.4 Theme 5: Improve the Destination Marketing to Attract More Visitors

Improve the marketing of Windhoek as a destination to raise awareness of what Windhoek offers and attract more visitors.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Revise the tourism brand strategy	<ul style="list-style-type: none"> Revise tourism brand strategy that addresses the USP and brand identity of Windhoek as a destination Roll out the brand strategy and present it to stakeholders 				
Market Windhoek more effectively as a unique, vibrant, all year-round destination by 2025	<ul style="list-style-type: none"> Develop a domestic tourism marketing strategy Collect relevant data on visitors to Windhoek (MET, HAN, Home Affairs, NSA, NTB) Develop a tourism sustainable climate change strategy Develop a tourism marketing strategy 				

Table 5: Theme 5 objectives, projects and responsibilities



5.2.3 Theme 3: Improve Tourism Stakeholder Alignment for Tourism Development

T&T stakeholder collaboration and participation was identified as both a key challenge and a critical success factor for the development of a sustainable tourism sector.

COW will collaborate with T&T stakeholders to develop and implement solutions for industry-wide to the benefit of the entire T&T sector.

COW will open channels of communication by creating platforms for networking, participating in sectoral platforms when invited, performing familiarisation visits and providing relevant and timely feedback to stakeholders.

Objectives	Projects / Initiatives	Dept. Lead Project	COW Lead Project	Promote and Support Private or Public Sector Project	Support Existing Private or Public Sector Initiative
Facilitate linkages with the sector by networking and communicating with T&T service providers and stakeholders	<ul style="list-style-type: none"> Develop cooperation agreements with stakeholders and industry to enhance tourism in the city (events together, campaigns together etc.) Initiate the Windhoek tourism networking platform to link up, network and communicate with stakeholders Conduct familiarisation visits with service providers and build meaningful relationships Liaise with other departments in COW to ensure that infrastructural challenges are resolved and addressed Secure departmental and council support for tourism initiatives Secure local & regional government buy-in for tourism initiatives Support stakeholder transport initiatives and incorporate them in COW's programs 				

Table 6: Theme 6 objectives, projects and responsibilities

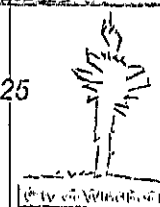


6. OPERATIONAL PLANNING MATRIX



6.2 The Planning Matrix

	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of Information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 1: Improve the Safety and Security in Windhoek					
Objective 1: Position Windhoek as the number 1 safest city in SADC by 2022	Regarded as the number 1 safety country in SADC Zero crime in Windhoek by 2022	SADC crime statistics	None	CEO, Mayor, City Police, NDF, Nampol, Interpol	As per approved budget, technical material support, HR
Objective 2: Educate and create safety awareness among tourists and residents of Windhoek.	Continuously approved by council or accreditation by NQA Approved by FANATA % reduction in crime after approval. Number of tourist and residents informed or trained. International destination accreditation and auditing Location – Windhoek	Number of awareness and safety initiatives conducted, Promotional material	None	Head Economic Development, City police, Marketing, EDD (Global Sustainable Tourism Council) GSTC	As per approved budget

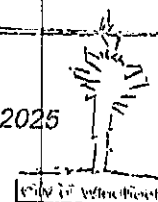


	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of Information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 2: Spearhead the Development of a Sustainable Tourism Industry in Windhoek					
Objective 1: Encourage investment in sustainable tourism by 2025	Number of ECO Tourism Projects promoted for investment/ funding at Investment forums attended Annual maintenance of heritage sites	Projects funded and secured investment Maintenance plan and budget maintenance report	Lack of projects Lack of support/funds Lack of investors' interest Availability of funds Cooperation between COW and national heritage council.	COW (EDD) & Tourism stakeholders COW & NHC	Funds Skills -- to develop investment projects Environmental Grants
Objective 2: Support sustainable tourism activities & relevant capacity building by 2025	Number of training sessions conducted Number of awareness and education campaigns Number of mentorship linkages created/facilitates (As per approved schedule)	Training report and attendance register Promotional & education materials Report on mentor success stories.	Funds availability & trainee dropout Funds availability Willingness to participate in mentorship programme	NATH, COW(EDD) Stakeholders EDD, Marketing, stakeholders COW (EDD) & HAN Stakeholders (Tourism)	Funds, material, Time, HR & stakeholders NTA (Namibia Training Authority)



	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of Information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Objective 3: Create awareness of the importance of and the benefits of tourism amongst the community	Results of a tourism perception survey Location - Windhoek Road Show to Schools	Number of awareness Initiatives conducted, Promotional material	None	Head Economic Development, Marketing, EDD Academic Institution offering Tourism	As per approved budget

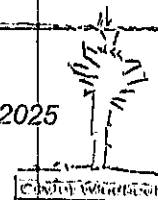
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	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 3: Ensure Customer Focus in the Sector by Improving Windhoek's Value Proposition					
Objective 1: Invest in Digitalisation	Apps Website Social Media Promotional Material	Lack of reading culture Availability of Funds Licenses Required (IOS etc)	None	Corporate communication ICT Marketing Tourism	Fund, material and technical support
Objective 2: Product Development	Packaging of services and activities Standards obtained Rating of hospitality Go / no-go decisions for each of the identified projects, based on the outcome of feasibility studies performed and project implementation plans for feasible projects	Funds availability standards in place	None	HAN COW – EDD Academic institutions offering tourism Hunting Association, Sports Associations Culture and Heritage Industry, MET	Fund, material and technical support



	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of Information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 4: Maintain and Develop Infrastructure to Support a Growing Tourism Industry in Windhoek					
Objective 1: Increase the level of involvement of the Department of Economic Development and Community Services in the town planning process	Join the town planning committee Immediately/ contribute incorporate tourism priorities in town plan. Develop a tourism disaster risk reduction strategy	Minutes of the meeting	None	Manager: LED Disaster Management Earth check African Centre for disaster studies UNSDRR	As per operational budget
Objective 2: Facilitate the ongoing development of functional water and electricity infrastructure for the future infrastructure for the future	Number of meetings attended Quality - Play a proactive role in spreading. Windhoek	Relevant data collected.	None	SH: T	As per operational budget
Objective 3: Advocate for the planning and maintenance of transportation networks by 2025	Contribute to all planning activities. QI-effective linkages between COW & stakeholders	Minutes of the meeting Projects implemented	None	SH: T	As per operational budget



	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 5: Improve the Destination Marketing to Attract More Visitors					
Objective 1: Revise the tourism brand strategy	Develop a brand strategy by June 2021	Strategy approved by council (CR)	None	SH: Tourism	As per operational budget
Objective 2: Market Windhoek more effectively as a unique, vibrant, all year-round destination by 2025	Develop Tourism promotion plan by 2020 December Facilitate the development of tourism products Tourism products developed for promotions Annually/ continuous review	Plan approved SE Forum	None	SH: Tourism	As per operational budget

573



	Key Performance Indicators (Quantity, Quality, Time, Location)	Means of Verification (Sources of information that verify achievement)	Assumptions (What may go wrong that is outside of your control, to negatively influence achievement of the result)	Responsibility	Resources (Staff, Budgets, Equipment, Systems, etc.)
Theme 6: Improve Tourism Stakeholder Alignment for Tourism Development					
Objective 1: Facilitate linkages with the sector by networking and communicating with T&T service providers and stakeholders	Stakeholder Engagement and Management Plan approved by SE Create networks and platforms, Exchange of relevant information Number of engagements	Stakeholder Engagement & Management Plan	None	SH: Tourism	As per operational budget



6.3 Monitoring and Evaluation

Monitoring and Evaluation (M&E) is a core function of management. The purpose of M&E is to ensure that the long-term goals of the council are achieved. To perform effective M&E, COW needs to develop a system for monitoring and evaluation that is used throughout the organisation, i.e. an M&E framework should be developed at corporate level and each department must input and evaluate their activities using the official M&E framework.

The M&E processes should further be structured to contribute to improved service delivery and to improve COW's overall efficiency and effectiveness in performing its functions. Overall, two main questions should be asked during the M&E process, namely:

- Are we doing the right thing?
- Are we doing things right?

6.3.1 Monitoring & Evaluation Objectives

The objectives of M&E in the context of the Tourism Strategy are to:

- Improve the performance of Tourism in Windhoek as it relates to the city's economic development;
- Identify, at pillar, programme and project level, the inputs or resources required to execute projects;
- Identify the activities to be performed to execute the programme and project successfully and sustainably;
- Evaluate project outcomes against desired KPIs; and
- Evaluate the overall tourism impact to the destination (Windhoek).

An example of an appropriate Impact Monitoring Framework is depicted overleaf.



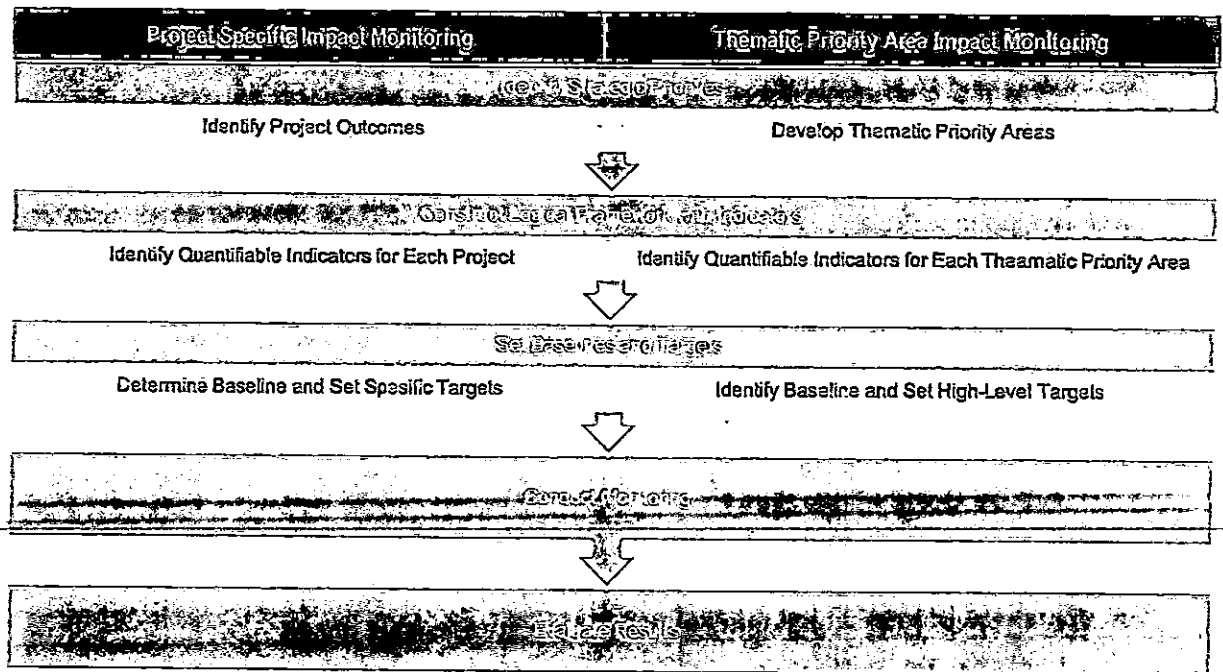


Figure 18: Impact monitoring framework

6.3.2 Project Scorecard

For each project, a project scorecard needs to be developed to track the project's implementation. Each project scorecard will focus on providing an overview of the project output and outcomes. Table 7 illustrates a basic project scorecard that should be updated on a weekly or monthly basis and includes an example of how to complete a project scorecard. Project specific outcomes are easy to attain and report on since each project's scorecard will contain the main outcomes. Before the study commences, each project needs to be benchmarked against available data which may include:

- What inputs are required for the project? E.g. resources and personnel
- What are the main activities of the project? E.g. Meeting or new infrastructure
- What are the project outputs or deliverables? E.g. Strategy document
- What is the desired outcome of the project? E.g. Main goal or objective

What impact should the project have? E.g. Number of jobs created.

Project Name:
Project Location:
Project Driver:
Project Funder:
Project Budget:
Project Man-Hours:
Project Kick-Off Date:
Project Deadline:
Key Project Objectives according to the terms of reference



Project Objective	Baseline Measure (before study)		Performance Measure (targets)	Target Achieved		
Project Objective 1				Yes / No		
Project Objective 2				Yes / No		
Project Objective 3				Yes / No		
Project Phase	Deliverable	Deadline	Actual Completion Date	Phase Budget	Actual Cost	Man-hours spent on phase
Phase 1	Deliverable 1					
	Deliverable 2					
Phase 2	Deliverable 3					
Phase n	Deliverable n					

Table 7: Project scorecard

6.3.3 Project Management Report

The project management report will summarise the active and future projects and should be updated on a monthly basis. This will provide Council and management with a quick overview of all projects and will assist with the identification of potential problem areas such as projects running behind schedule, projects going over their allocated budget or projects not achieving their targets. The project management report is illustrated in Table 8, which includes an example of how to complete a project management report.

Project Name	Project Location	Project Driver	Project Phase	Project on Schedule	Project within Budget	Project within Man-hours allocation	Project Achieved Targets
Project 1				Yes / No	Yes / No	Yes / No	Yes / No
Project 2							
Project n							

Table 8: Project management report

6.3.4 Thematic Priority Area

M&E at the Thematic Priority Areas are predominantly conducted at an issue, sectoral or programme level as identified in municipal strategies. Table 9 illustrates the thematic priority area assessment tool that can be used to monitor progress.

To perform effective M&E at thematic priority level, COW needs to select appropriate parameters against the thematic priority areas. Table 4 provides an example of indicators that could be used to track potential themes, based on pillar, sector or programme outcomes and deliverables. Data for each parameter can be obtained from several sources, including but not limited to, National Statistics Agency (NSA), community, business or industry-specific surveys, or programme and project inputs, activities, deliverables, outcomes and impact. Where data is not available, anecdotal data must be collected by means of stakeholder engagements or interviews with key stakeholders.



Key Performance Area: Tourism							
Pillar Objective:							
Standard Criteria	Indicator	Source	Benchmark	Failed to Achieve Standard	Target or Standard Range	Exceeded Standard	Comment

Table 9: Thematic priority areas assessment tool

Theme	Potential Indicators / Types of Indicators
Tourism - To improve on its tourism product offering to encourage tourists to extend their stay within COW.	<ul style="list-style-type: none"> Number of paid tourists at key sites Number of signatures in tourist log-book (at OMD offices) Number of visitors in lodges / places of accommodation

Table 10: Example of indicators for thematic priority areas

3.3.5 Evaluation

By periodically analysing the data, COW will be able to determine the overall success of its interventions, as well as create a better understanding of resource and capacity utilisation. When scrutinising the outputs and outcomes of the pillars, programme and project, the following questions should be posed:

- Were the necessary resources and capacity allocated to the programme and project?
- Were the required project resources and capacity correctly estimated?
- Did the programme and project have the desired outcome and impact?
- Did the sum of all programmes and projects achieve the main pillar goals?

3.3.6 Reporting

Monthly and annual reporting needs to be implemented. Due to the frequency of availability of data, monthly reports should focus on projects updates, while annual reports focusing on strategic interventions and programmes.



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Theme	Economic Advancement This theme is to ensure that the City is productive, inclusive, and sustainable through rendering access to urban services, socio-economic opportunities, spatial inclusiveness, quality urban environment and vibrant city life.	
Strategic Objective	Ensure quality of life for all our residents and stakeholders.	
Key Performance Area (KPA)	Economic Development This Key Performance Area (KPA) is to ensure that the City will drive economic inclusion to achieve sustainable economic growth and development.	
Key Performance Indicator (KPI)	Approval of the Sustainable Tourism Development Strategy This indicator measures the date by when the Sustainable Tourism Development Strategy will be approved, to realise the attraction and retention of tourism to Windhoek.	

THEME: SOCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
Improve safety and security of residents	2022/2023	Engage the Ministry of Justice to develop a joint solution for the timely resolution of crimes against tourists	0.00	<ul style="list-style-type: none"> - Increase in duration of tourists' stay in return; - Increased revenue spent in the City; - Visitors feeling safer in the City; - Establish and promote image of Windhoek as a safe and tourism friendly city; and - Enhance job creation. 	<ul style="list-style-type: none"> - Ministry of Justice; - Namibian Police; - City Police; Local Tourism Forum; and - Department of Information and Communication Technology.
Ensure customer focus in the sector by improving Windhoek's proposition		Leverage the use of technologies to prevent crime	Departmental		
		Digitalisation: Development of the Website and Tourism App	0.00	<ul style="list-style-type: none"> - Promote Windhoek as a tourist destination. 	<ul style="list-style-type: none"> - Department of Information and Communication Technology
Improve Tourism Stakeholder alignment for tourism development		Establish a Local Tourism Forum	50 000.00	<ul style="list-style-type: none"> - Strengthen and collaborative ecosystem; and - Creating local value chain to pool resources and promote joint development priorities, i.e. marketing, infrastructure development. 	<ul style="list-style-type: none"> - Tourism, heritage and arts, and culture industries; and - Local Tourism Forum.

THEME: SOCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
Spearhead development of sustainable tourism industry	2023/2024	Develop a Heritage Management Policy	350 000.00	- Regulating and management of Heritage Resources.	<ul style="list-style-type: none"> - Heritage and tourism industry; - Ministry of Education, Arts and Culture; - Ministry of Environment and Tourism; - Higher educational institutions; - National Heritage Council; and - Museum Association of Namibia
		Develop and implement a Public Art Policy	500 000.00	<ul style="list-style-type: none"> - Management of public art in Windhoek and as a function of the City of Windhoek's branding; - Promotion of public art; and - Funding of public art. 	<ul style="list-style-type: none"> - Arts and culture industry; - Higher educational institutions; - Ministry of Education, Arts and Culture; - National Arts Council; - National Art Gallery; and - National Theatre of Namibia.
		Develop a Tourism Small and Medium Enterprises Empowerment Policy	250 000.00	<ul style="list-style-type: none"> - Value chain development; - Job creation; - Compliance to regulatory provisions; - Establish a resilient industry; - Enhance local tourism offerings; - Extend stays of tourists; and - Job creation. 	<ul style="list-style-type: none"> - Tourism industry; - Associations; - Higher educational institutions; - Ministry of Environment and Tourism; and - National Tourism Board.
		Tourism Awareness Campaigns	50 0000.00	<ul style="list-style-type: none"> - Create a safe environment for tourists; - Enhance tourism stay; and - Promoting the City as a safe and tourist friendly destination. 	<ul style="list-style-type: none"> - Tourism industry; - Higher educational institutions; - Ministry of Environment and Tourism; and - National Tourism Board.
		Welcoming signs (Phase 1: BI Okahandja/Windhoek)	600 000.00	- Create a welcoming ambience.	<ul style="list-style-type: none"> - City of Windhoek's Departments of Urban and Transport Planning; and Office of the Chief Executive Officer (Marketing); - VKE; - Roads Authority; and - Windhoek Engineering Consultancy.
Ensure customer focus in the sector by improving Windhoek's proposition					
Improve destination marketing to attract more visitors		Revise and implement a City Tourism Brand Strategy	500 000.00	- To establish and promote the City's unique selling proposition.	<ul style="list-style-type: none"> - Tourism Forum; - Ministry of Environment and Tourism; and - National Tourism Board.

THEME: SOCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
Spearhead development of sustainable tourism industry	2024/2025	Welcoming signs (Phase 2: B6 Windhoek/Gobabis)	600 000.00	- Create a welcoming ambience.	<ul style="list-style-type: none"> - City of Windhoek's Departments of Urban and Transport Planning; and Office of the Chief Executive Officer (Marketing); - VKE; - Roads Authority; and - Windhoek Engineering Consultancy.
		Develop a Heritage Management Strategy (includes management of heritage sites)	250 000.00	- Regulating and management of Heritage resources.	<ul style="list-style-type: none"> - Heritage and Tourism Industry; - Ministry of Education, Arts and Culture; - Ministry of Environment and Tourism; - Higher educational institutions; - National Heritage Council; and - Museum Association of Namibia.
		Tourism Awareness Campaigns	50 0000	<ul style="list-style-type: none"> - Create a safe environment for tourists; - Enhance tourists' stay; - Promote the City as a tourist friendly destination. 	<ul style="list-style-type: none"> - Office of the Chief Executive Officer; - Tourism industry; - Higher educational institutions; - Ministry of Environment and Tourism; and - National Tourism Board.
Ensure customer focus in the sector by improving Windhoek's proposition Objective 1: Invest in digitalisation Objective 2: Product development	2025/2026	Welcoming signs (Phase 3, B1 Windhoek/Rehoboth)	600 000.00	- Create a city welcoming ambience.	<ul style="list-style-type: none"> - City of Windhoek's Departments of Urban and Transport Planning; and Office of the Chief Executive Officer (Marketing); - VKE; - Roads Authority; and - Windhoek Engineering Consultancy.
		Tourism Awareness campaigns	50 0000	<ul style="list-style-type: none"> - Create a safe environment for tourists; - Enhance tourists' stay; and - Promote the City as a tourist friendly destination. 	<ul style="list-style-type: none"> - Office of Chief Executive Officer; - Tourism industry; - Higher educational institutions; - Ministry of Environment and Tourism; and - National Tourism Board.

THEME: SOCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
	2026/2027	Welcoming signs (Phase 4, C28 Windhoek/Walvis Bay)	600 000.00	- Create a city welcoming ambience.	<ul style="list-style-type: none"> - City of Windhoek's Departments of Urban and Transport Planning; and Office of the Chief Executive Officer (Marketing); - VKE; - Roads Authority; and - Windhoek Engineering Consultancy.

THEME: FINANCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
Spearhead the development of a sustainable tourism industry in Windhoek Objective 1: Encourage investment in sustainable tourism by 2025 Objective 2: Create awareness of the importance of and the benefits of tourism amongst the community	2023/2024	City Museum value enhancement	1 500 000.00	<ul style="list-style-type: none"> - Revenue will be collected through the revenue sharing model; and - Development could include leases such as crafters, artists working spaces rentals, events entrance fees as well as accommodation. 	<ul style="list-style-type: none"> - Department of Infrastructure, Water and Technical Services; and - Higher educational institutions.
		Development of tourism facilities on a Public Private Partnership (PPP) model: Brakwater	Public Private Partnership (PPP) model		<ul style="list-style-type: none"> - City of Windhoek's departments; - Financial institutions; - NIPDP; and - Investors.
		Event By-law	50 000.00	<ul style="list-style-type: none"> - Formalising and regulating events in the City; - Inform the City Events Calendar; - Extending visitors' stay; - Generate income through events registrations; and - Create an enabling environment for events. 	<ul style="list-style-type: none"> - City of Windhoek's departments.
		Formulation of a City Tourism Grading Policy	100 000.00	<ul style="list-style-type: none"> - Compliant with required standards; - Generating income through the City of Windhoek's levy; - Enhance the tourism experience; and - Quality assurance. 	<ul style="list-style-type: none"> - Tourism industry; - Ministry of Environment and Tourism; and - National Tourism Board.
		Development of a City Festivals Strategy to be implemented on a Public Private Partnership (PPP) approach	50 000.00	<ul style="list-style-type: none"> - Enter into smart partnerships to develop an annual trademark event owned by the City of Windhoek for residents; - Sustainable festivals development by generating income; - Extending tourists' stay; and - Enhance the local economy. 	<ul style="list-style-type: none"> - Ministry of Environment and Tourism; - Ministry of Education, Arts and Culture; - Heritage, Arts and Culture and Tourism Industry; and - Co-operation Agreements.

THEME: FINANCIAL SUSTAINABILITY					
Period	Financial year	Activities	Estimated budget (N\$)	Expected outcome/ROI	Interdependencies
		Development of tourism facilities on a Public Private Partnership (PPP) model: Windhoek Cone Area	Public Private Partnership (PPP) model	<ul style="list-style-type: none"> - Revenue will be collected through revenue sharing model; and - Development could include leases such as crafters, artists working spaces rentals, events entrance fees as well as accommodation. 	<ul style="list-style-type: none"> - City of Windhoek's departments; - Financial institutions; - NIPDP; and - Investors.
	2024/2025	Implement a City Tour Bus	1 200 000.00	<ul style="list-style-type: none"> - Generate income; - Market the City and its attractions; - Enhance tourists' experience; and - Extend stay of visitors. 	<ul style="list-style-type: none"> - Department of Urban and Transport Planning; and - Tourism industry.
		Development of tourism facilities on a Public Private Partnership (PPP) model: Windhoek Cuisine Market	500 000.00	<ul style="list-style-type: none"> - Generate income; - Market the City; and - Increase stay of visitors. 	<ul style="list-style-type: none"> - Department of Housing, Property Management and Human Settlement; - Investors; - Financial institutions; and - NIPDP.
	2025/2026	Development of tourism facilities on a Public Private Partnership (PPP) model: Creative, visual and performing arts incubation centre	500 000.00	<ul style="list-style-type: none"> - Repurposing existing Council owned buildings; - Leases for arts studios; - Theatres for performances; and - Job creation. 	<ul style="list-style-type: none"> - City of Windhoek's departments; - Financial institutions; - NIPDP; - Industry stakeholders; and - Co-operation Agreements
		Development of tourism facilities on Public Private Partnership (PPP) model: Van Rijn Dam Development	500 000.00	<ul style="list-style-type: none"> - Revenue will be collected through revenue sharing model; and - Development could include picnic areas, restaurant etc. 	<ul style="list-style-type: none"> - City of Windhoek's departments; - Financial institutions; - NIPDP; and - Investors.

CITY OF WINDHOEK TOURISM STRATEGY

An aerial photograph of Windhoek, Namibia, showing a mix of urban development and natural landscape. The city is spread across a valley, with various buildings and roads visible. The surrounding area appears to be a combination of developed land and natural terrain. The image is in black and white, giving it a historical or official feel.

2019 TO 2023

BENCHMARKING REPORT

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY	1
2. HOW DOES THE NAMIBIAN TOURISM SECTOR COMPARE TO OTHERS?.....	1
3. HOW DOES WINDHOEK COMPARE TO OTHER CITIES?	4
3.1 How we Compare to Kigali, Rwanda.....	4
3.1.1 What does Kigali offer?	5
3.1.2 Branding: What is Kigali best known for?.....	6
3.1.3 How did the city of Kigali achieve success?.....	7
3.2 How we Compare to Nairobi, Kenya	9
3.2.1 What does Nairobi offer?.....	9
3.2.2 Branding: What is Nairobi best known for?	11
3.2.3 How does Nairobi continue to grow their tourism sector?	11
3.3 How we Compare to Johannesburg, South Africa	13
3.3.1 What does Johannesburg offer?.....	13
3.3.2 Branding: What is Johannesburg best known for?.....	14
3.3.3 What is Johannesburg doing to boost tourism?	14
4. WHAT CAN THE CITY OF WINDHOEK LEARN FROM ITS COUNTERPARTS?.....	18
4.1 Key Take-aways for Windhoek.....	18

TABLE OF FIGURES

Figure 1: Travel and tourism competitiveness index.....	1
Figure 2: Namibia competitive index performance overview, 2017	3
Figure 3: Rwanda population pyramid, 2017	4
Figure 4: Some of the few remaining mountain gorillas in the world	5
Figure 5: Kigali convention centre	6
Figure 6: Bisate Lodge villas nestled into an extinct volcanic cone near Volcanoes National Park in Rwanda.....	6
Figure 7: Visit Rwanda Arsenal FC sleeve	8
Figure 8: Nairobi National Park against the city's backdrop	10
Figure 9: Kenyatta International Convention Centre	11
Figure 10: Matatu mode of transport	12
Figure 11: Arts and dance in Johannesburg.....	13
Figure 12: Snapshot of tourism BEE website	15
Figure 13: TGCSA stars.....	16

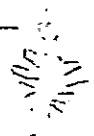


Figure 14: Snapshots of websites promoting Johannesburg city tourism.....16

Figure 15: Visit Joburg app homepage.....17

LIST OF TABLES

Table 1: Namibia, Botswana and South Africa competitive scores per criterion 2



1. EXECUTIVE SUMMARY

We benchmarked Windhoek against African cities that have been able to overcome key challenges and successfully develop and grow their tourism sectors. The cities benchmarked highlighted eight key lessons that the City of Windhoek can learn and implement to improve tourism in Windhoek by increasing the time and money spent by both visitors and residents.

2. HOW DOES THE NAMIBIAN TOURISM SECTOR COMPARE TO OTHERS?

The World Economic Forum (WEF) evaluates the competitiveness of various countries as tourist destinations and publishes an annual report with their findings. The competitive index is based on an assessment of four broad pillars as depicted below.

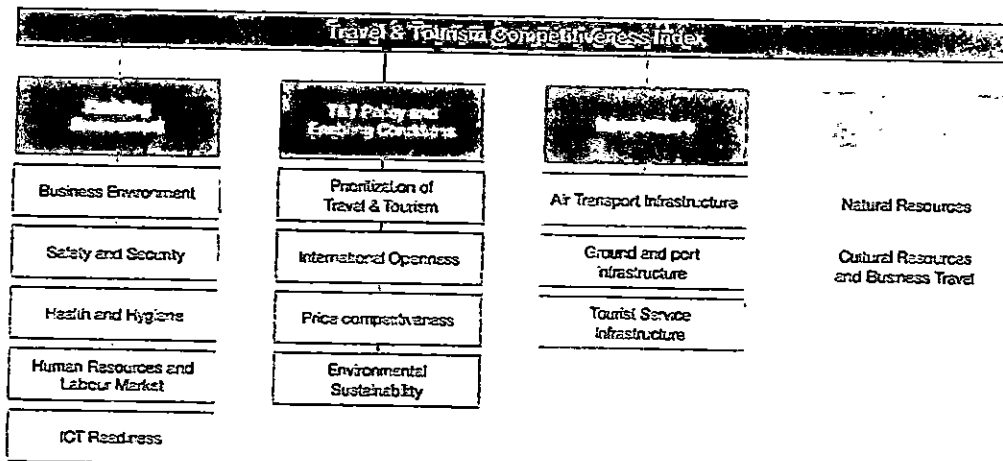


Figure 1: Travel and tourism competitiveness index

In 2017, Namibia was ranked 82nd overall out of 136 countries; and was the fourth most competitive country in Sub-Saharan Africa behind South Africa (53rd), Mauritius (55th) and Kenya (80th). Namibia lost 12 positions from 2016 to 2017 due to several factors.

We compared the findings related to Namibia against South Africa and Botswana as Namibia competes for the same international tourists.

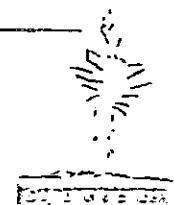


Namibia was ranked as follows compared to Botswana and South Africa on a scale of 1 (lowest) to 7 (highest).

Country	Enabling environment				
	Business environment	Safety and security	Health and hygiene	Human Resources and labour Market	ICT readiness
Botswana	5.1	5.3	3.5	4.5	4.1
Namibia	4.9	5.2	3.5	4.1	3.9
South Africa	5.3	3.9	3.8	4.6	4.4
Country	T&T policy and enabling conditions				Environmental sustainability
	Prioritisation of T&T	International openness	Price competitiveness		
Botswana	4.6	2.2	5.7		4.5
Namibia	4.6	2.7	5.4		3.9
South Africa	4.7	2.4	5.2		3.6
Country	Infrastructure			Tourist service infrastructure	
	Air transport infrastructure	Ground and port infrastructure			
Botswana	2.2	2.8		3.6	
Namibia	3.0	3.2		4.0	
South Africa	3.4	3.4		4.4	
Country	Natural and cultural resources		Cultural resources and business travel		
	Natural resources				
Botswana	3.5				
Namibia	3.8				
South Africa	4.4				

Table 1: Namibia, Botswana and South Africa competitive scores per criterion

Namibia's overall score was tied with Kenya's at 3.59, compared to South Africa's 4.01 and Botswana's 3.52. Namibia was ranked 40th on natural resources, 38th on business environment, 58th on air transportation and 30th on price competitiveness which boosts overall ranking. The loss of 12 positions in 2017 were largely caused by statistical adjustments with improved information gathering on factors such as deforestation in the country. Namibia has scored low on sustainability (127th) due to significant deforestation and deteriorating water resources. The key factors that had low scores and require improvement were health and hygiene (117th), underappreciated cultural resources (127th) and inadequately qualified human resources (106th).



Performance Overview

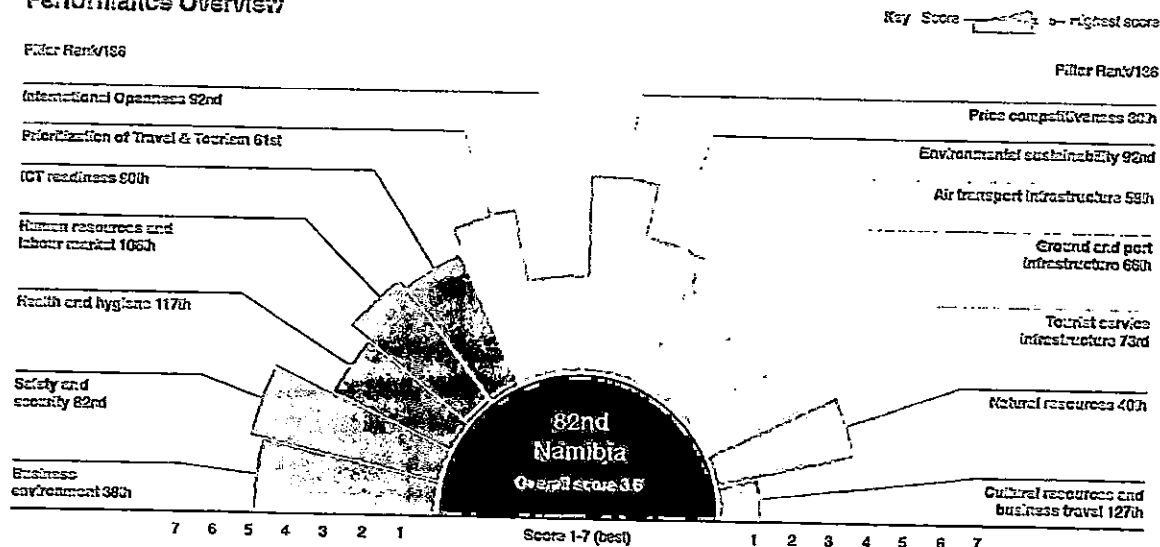


Figure 2: Namibia competitive index performance overview, 2017

The outcome of the competitive benchmarking highlights key areas for improvement in the sector to strengthen Namibia's value chain and those factors that should be protected and maintained or strengthened.

The assessment outcome indicates that there is room to maximise the value we derive from cultural resources, and possibly increase business tourism considering our competitive position. The scoring on the labour market indicates that the country needs to invest in the skills development of the persons employed and enterprising in the tourism sector. Investment should be made into sanitation and waste management to improve on health and hygiene and reduce disease outbreaks. Namibia traditionally ranks well in sanitation compared to the rest of Africa, therefore this metric has significant room for improvement. The state of the infrastructure that supports tourism is vitally significant as it directly enhances or constraints tourism. Environmental sustainability is a crucial metric as conservation is a global priority and in lieu of the growth in eco and sustainable tourism. All in all, the performance review indicates that Namibia has much to do to remain competitive.



3. HOW DOES WINDHOEK COMPARE TO OTHER CITIES?

3.1 How we Compare to Kigali, Rwanda

Rwanda has become one of the top tourism destinations in Africa, a remarkable fact against the backdrop of the far-reaching and devastating effects of the Rwandan genocide of 1994. The genocide resulted in the deaths of approximately 1 million people in only 100 days. Millions fled the country, many more were displaced, children were orphaned, infrastructure was destroyed and consequently the economy tanked.

Today, Rwanda is one of the most densely populated countries in Africa and has a young population because of the genocide. In 2017, 41% of the population was below the age of 14 and 60% of the population was younger than 24 years old.

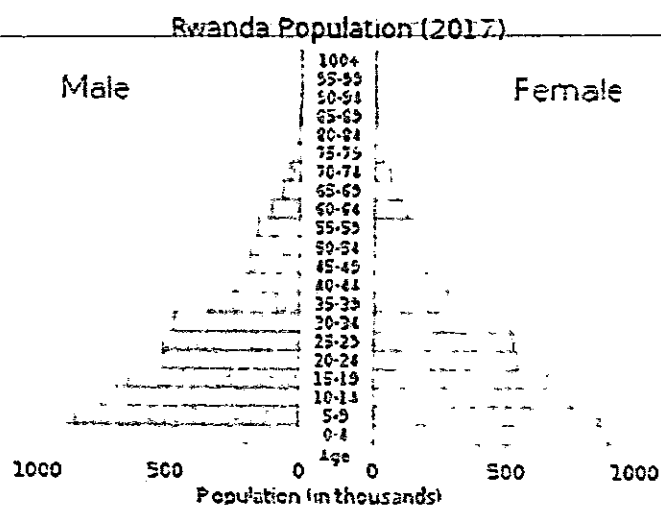


Figure 3: Rwanda population pyramid, 2017

As time passes, an increasing number of people will grow up and join the working age population (an estimated 125,000 people per year), therefore it is important that the Rwandan economy grows in a sustainable manner that creates jobs to minimise the unemployment rate.

It is further reported that while 100% of the national budget was dependent on aid in 1995, the Rwandan economy successfully recovered so that only 17% of the national budget was from aid in 2018. Tourism has been noted as a key driver of economic growth for Rwanda and is reported to have replaced coffee exports as the top foreign exchange earner. The tourism sector is estimated to have contributed 11% jobs to the Rwandan economy in 2017 and to have grown by 30% over a two-year period in 2017. It is further estimated that 4 out of 5 new jobs are in Small and Medium-Sized Enterprises (SMEs) in hospitality.



Tourism has therefore been identified as a key driver for sustained economic growth in Rwanda.

The capital city of Kigali boasts unique landscapes of hills, ridges, valleys, waterfalls, volcanoes and rainforests which are intermingled with its beautiful and modern buildings to create a distinctive rural and city mix. Kigali continues to attract an increasing number of visitors to the city and build a bustling tourism industry.

Rwanda continues to grow their tourism industry and against all odds, therefore Kigali presents a notable case study of tourism enhancement.

3.1.1 What does Kigali offer?

Most of the leisure tourists who visit Kigali intend to do mountain gorilla trekking. Mountain gorillas are only found in Rwanda, Uganda and DRC Congo and are classified as a critically endangered species. The total worldwide population of mountain gorillas was estimated to be 880 individuals in 2018. The mountain gorillas were became widely known due to the research of the American conservationist Dian Fossey which was published in her 1983 book "Gorillas in the Mist".



Figure 4: Some of the few remaining mountain gorillas in the world

Kigali has further positioned itself as a major business hub and as a choice destination for **Meetings, Incentives, Conferences and Exhibitions (MICE)** in the region. The International Congress and Convention Association (ICCA) ranked Kigali as the second most popular destination for MICE tourism in Africa, behind Cape Town in 2019. The rankings are based on the number of association meetings hosted by a city and the city's ability to cater for the increased number of visitors. Kigali has built a world-class conference centre and increasingly hosts several high-profile meetings including the eighth International Federation of Association Football (FIFA) council meeting in 2018.



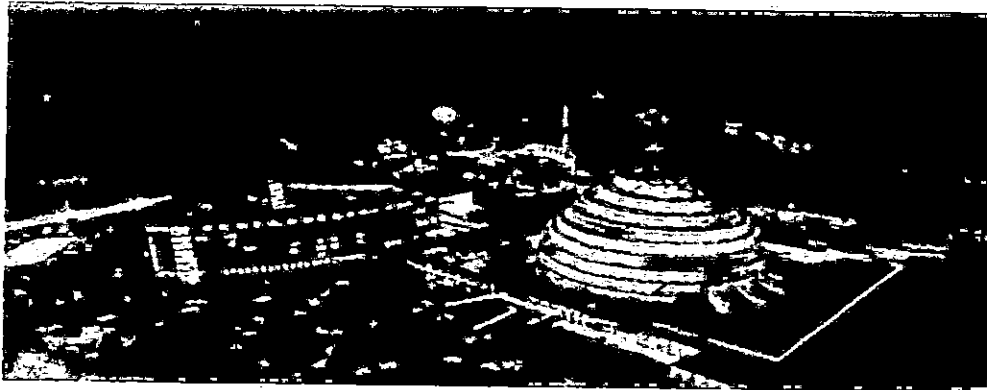


Figure 5: Kigali convention centre

Furthermore, numerous five star and well-known hotel chains have invested in large and sizeable hotels in Kigali, including the Radisson Blu, the Marriott Hotel, Kempinski Hotels and the Sheraton Hotel. The investment in city's tourism sector by these well-known brands is an indicator of confidence in the sector's growth being sustainable and enables Kigali to easily attract and cater to high-end tourists.

The is further easily accessible through the Kigali International Airport which receives flights from numerous airline carriers and has direct flights to Europe, the Middle East and African cities.

3.1.2 Branding: What is Kigali best known for?

A former mayor of Kigali has been quoted as aiming for Kigali to be a “clean, green and safe” city. The city appears to have achieved all three of these stated objectives.

Kigali is hailed as the cleanest city in Africa, a title which was previously attributed to Windhoek. Rwanda is further known for successfully implementing eco-tourism that preserves the environment and sustainable tourism that benefits the societies and communities who receive visitors.

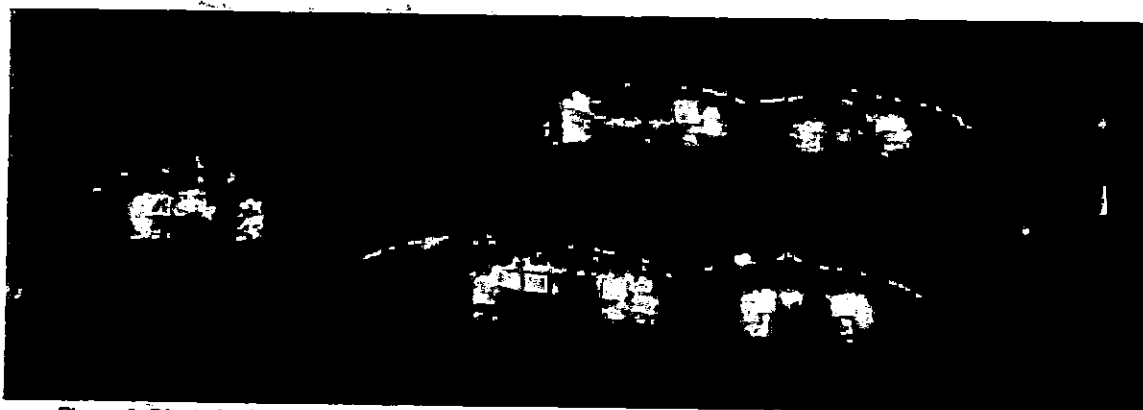


Figure 6: Bisate Lodge villas nestled into an extinct volcanic cone near Volcanoes National Park in Rwanda



Kigali is further heralded as the safest city in Africa and the 11 safest city in the world. The city is further purported to have friendly people who are ready and willing to help tourists when required. In 2017, Rwanda was ranked as the least corruption perceived country in Africa.

3.1.3 How did the city of Kigali achieve success?

Policy reforms that improve tourism

The Rwanda Development Board (RDB) was established to oversee all policies related to the investor experience, including overseeing regulation, foreign investment and promoting tourism. The RDB has successfully implemented several policies and initiatives to boost tourism growth, including:

1. *Creating a business conducive climate* – Rwanda was ranked as the 29th easiest country to do business in 2019 by the World Bank.
2. *Clear strategy related to tourism* – Rwanda has clearly established itself as a luxury and high-end tourist market. For instance, the price for a permit to visit the gorillas is a staggering USD 1,500 per person, and only an average 96 permits are sold per day. Kigali has further established itself as a choice destination for MICE tourism.
3. *Investment in tourism infrastructure development* – Over USD 2 billion was registered as invested in tourism infrastructure by both the public and private sectors in 2018.
4. *Easy access to Rwanda* – Visa free entrance for all Africans and a USD 30 visa on arrival for all other nationalities. Rwanda further partnered with Uganda and Kenya to offer a USD 100 visa which is valid for travel to all three countries. The easy access to visitors has resulted in a hassle-free and fast immigration experience.
5. *Encourage longer stay in Rwanda* – tourists get a 30% discount on the gorilla visit permit if they stay in the country for 6 nights or longer.
6. *Incentives for certain T&T suppliers* – Airplanes importing tourists and hotel shuttles are exempt from certain taxes.

How Kigali became clean

The city instituted several bold and radical initiatives to address cleanliness and hygiene. The most notable initiatives are:

1. *Informal trading is illegal* – traders and hawkers are only allowed to operate at designated formal markets. Hawkers caught trading goods informally may be arrested or fined and will have their goods confiscated. Police officers are the enforcers of this law.
2. *Plastic bag ban* – it is illegal to make, use, sell and import non-biodegradable



plastic bags in Rwanda since 2008. Plastic bags are considered to be contraband and visitor luggage is searched and any plastic bags found are confiscated. Contravention of this law may result in heavy fines or even jail time.

3. *Mandatory monthly clean up campaigns* – all citizens between the ages of 18 to 65 are required to participate every last Saturday of the month from 08h00 to 11h00. Activities range from cleaning the streets, cutting grass, trimming bushes alongside the roads, repairing public buildings and planting trees. Failure to participate may result in fines or even arrests.
4. *The Kigali mayor receives daily reports* – on the number of thieves, informal traders, prostitutes, drug users, street children and transients arrested that day.
5. *Safety and hygiene are rewarded* – on an annual basis, the city of Kigali rewards the best performing district in terms of safety and cleanliness based on an assessment.

How Kigali became green

The plastic bag bans largely contributed to the city becoming green. Furthermore, tourism is geared toward preserving the environment. Initiatives include planting trees to reverse deforestation and conserve animal habitats.

How Kigali became safe

Common crime is rare as soldiers with automatic rifles patrol the city, creating visible police presence, particularly in tourist areas prone to crime. Furthermore, residents and visitors are not allowed to take pictures of any government or military buildings and property to reduce crime.

How Kigali became known by international markets

Rwanda has invested in international marketing to improve their image abroad. One such investment was the £ 30 million agreement with London-based Arsenal Football Club (FC) to become a sleeve partner, build visibility and build their tourism industry in 2017. The Visit Rwanda brand is now included on the shirtsleeves of Arsenal FC players.



Figure 7: Visit Rwanda Arsenal FC sleeve



The Arsenal shirt is seen approximately 35 times a day around the globe. As part of the agreement, Arsenal players will visit Rwanda to support the development of the game of soccer for Rwandan children. In 2018, Rwanda received 20% more tourists from the United Kingdom.

How locals welcomed tourism

RDB undertook an extensive marketing campaign locally to educate the public about tourism and increase tourist acceptance in local communities.

Furthermore, Gorilla treks and conservation efforts became in the interest of everybody. Poachers are now trackers, locals have jobs and a percentage of funds received from treks are given to local farmers and communities.

How locals are being equipped to enhance the visitor satisfaction

Rwanda has attracted investments in training and skills development for entrepreneurship and jobs related to tourism. One such initiative is the five year USD 50 million Hanga Ahazaza initiative by the Mastercard Foundation to train and equip young Rwandans with skills required in the tourism and hospitality sectors. The initiative aims to align training with global standards. The initiative further aims to support small T&T businesses with access to financial services and business development skills training.

3.2 How we Compare to Nairobi, Kenya

Nairobi in Kenya has successfully established themselves as an attractive destination for the African tourist market. Kenya is reported to have received 800,000 African visitors in 2017. Nairobi aims to be a world class metropolis that provides a wide range of modern services supported by the right infrastructure by 2030.

Nairobi is on the doorstep of the Nairobi National Park which is a mere 15 minutes away and is comfortably able to provide both a city and safari experience to visitors.

The largest threat that the Kenyan tourism industry faces is the risk of terror attacks by al-Shabaab militants from Somalia. The Kenyan tourism industry has however proven itself to be resilient, as in the case of the DusitD2 Hotel in Nairobi which opened only seven months after a terror attack that left 21 people dead in January 2019. The hotel reported few cancellations after the attack, citing that the market had seemingly become desensitised to attacks as tourists from the West face increasing terror attacks in their own countries.

3.2.1 What does Nairobi offer?

Nairobi offers a **safari experience** as the Nairobi National Park is a few minutes away, and further acts as a gateway to other safari parks in Kenya. In addition to the standard safari packages, visitors are offered the rare chance to **interact with wild animals** that



are being rehabilitated in the many wildlife sanctuaries in and around Nairobi. Tourists to Nairobi have the chance to cuddle elephant calves, feed rescued giraffes and fall asleep to sounds of roaring lions.



Figure 8: Nairobi National Park against the city's backdrop

Kenya has long established themselves as **conservation champions**, by undertaking distinctive actions such as the burning of 11 tons of seized ivory in 1989 by then President Daniel arap Moi. President Uhuru Kenyatta reinforced the country's conservation stance by burning 100 tons of ivory in 2016, which was estimated to be equal to 5% of the world's total ivory stock at the time. The recent ivory burning site is a popular tourist attraction that is situated just inside the Nairobi National Park's main gate.

Nairobi boasts excellent **museums, cultural and historical sites** that invite visitors to share in Nairobi's rich heritage. The Karen Blixen Museum is a well-known location whose namesake wrote the book "Out of Africa" on her years spent running a coffee plantation on the grounds. The site is well preserved, and visitors can encounter much of what is written of in the book. In addition, a living museum is just outside of Nairobi that showcases the culture and lifestyles of the various tribes in Kenya. In addition, tourists may opt to spend a day with the Maasai people in their ancestral homeland and experience other village visits. Nairobi further offers a beads factory tour where visitors can interact with many empowered local women who make the beads and pottery, and to purchase items from them at fair prices.

Nairobi is home to a growing "slum tourism" market as more tourists show an interest in visiting Kibera, a shanty town in Nairobi which houses 250,000 residents over an area of 2.5 km². Residents in Kibera have welcomed tourists and are actively involved in storytelling and sharing their everyday lives with them. Tour operators introduce tourists to the initiatives that are run by young residents of Kibera, who often end up partnering with and supporting the initiatives they see.

Nairobi is internationally accepted as a preferred destination for **MICE tourism** and was ranked amongst the top five MICE destinations in Africa by ICCA in 2019. The Kenyatta International Convention Centre (KICC) is a 28-story building that includes an amphitheatre and has a conference chamber that can accommodate up to 5,000 people. KICC remains one of the best ranked MICE venues in Africa, despite being an older venue (construction was completed in 1974).





Figure 9: Kenyatta International Convention Centre

Moreover, Nairobi is the chosen location of the **regional headquarters** for many international companies including Blackberry Ltd, Heineken, IBM, Mastercard, Nestle, Red Cross, Toyota, World Bank and IMF.

Like Kigali, many **luxury and well-known hotel chains** are present in Nairobi, and the country aims to increase its **airline routes to other African countries**.

3.2.2 Branding: What is Nairobi best-known for?

Nairobi is known as the “safari capital of Africa” because of its proximity to the Nairobi National Park. It is also known for having a rich culture and heritage that tourists can share in and experience when visiting. Nairobi has a diverse mix of cultures, with most Kenyans being fluent in at least three languages.

The city is known to offer great street cuisine options, particularly of barbequed meat. Tea and coffee are locally grown and are staple beverages in Nairobi. Furthermore, the city has a buzzing and active nightlife.

3.2.3 How does Nairobi continue to grow their tourism sector?

Addressing the risk of terrorism

Law enforcement have increased vehicle checkpoints and bag searches. The country instituted counter terrorism measures after the attack at Westgate Mall in 2013 and established a National Counter Terrorism Centre (NCTC) to improve emergency preparedness. The NCTC further educates the public on how to react in the event of a terror attack and has installed many state-of-the-art surveillance equipment in high-risk areas. Inter-agency co-operation regarding terrorism matters has reportedly improved. Many hotels have further signed up as members of the Safe Hotels Alliance which is a global organisation that independently assesses and certifies hotels on their safety and security, setting tourists minds at ease.



Making it easy to get out and about

Nairobi offers many options of safe and reliable transportation including using buses and matatus, the option to hire a taxi for the day or using Uber.



Figure 10: Matatu mode of transport

Matatus range in service offerings, with some offering Wi-Fi to distract passengers from the city's slow-moving traffic. Kenya has further invested in upgrading their rail infrastructure to accommodate express trains that can be used to travel between major towns in Kenya and to Dar es Salaam in Tanzania.

Reducing the risk of crimes against tourists

Tourists are discouraged from carrying cash and should instead pay for goods and services using "M-pesa" which is mobile money that is widely used in Kenya.

Reinforcing their conservation stance

Kenya successfully rolled out a plastic bag ban in 2017 and continues to implement it. Contraventions of the ban may result in a prison sentence of up to 4 years or a maximum fine of USD 40,000. In 2018, raids were conducted across Kenya and more than 50 people were arrested. Furthermore, the Kenyan Environmental Management Agency shut down a busy street market which was found to be violating the ban with immediate effect until it could demonstrate itself to be fully compliant with the ban.

Increasing visitors from Africa

Kenya offers visa-on-arrival entrance to all Africans visiting Kenya for 30 days or less. The country continues to increase air connectivity to other African nations in a bid to grow travel to Kenya.

Ensuring community buy in for cultural tourism

Cultural tourism, and particularly slum tourism, have successfully included the participation of local communities in tours by encouraging them to interact with tourists and share their heritage and experience. Local communities often obtain financial support from visiting tourists and therefore have a vested interest in tourists having a superior visitor experience.



3.3 How we Compare to Johannesburg, South Africa

Johannesburg is the largest city in South Africa and was named as the wealthiest city in Africa in 2018. Johannesburg is the economic powerhouse where the Johannesburg Stock Exchange (JSE) is based, the oldest and largest stock exchange in Africa.

Johannesburg is traditionally considered to be a city that caters for business instead of leisure, and therefore faces the challenge of branding itself as city for tourists and faces stiff competition from cities like Cape Town and Durban.

South Africa was named the fourth most dangerous country in the World in 2018, with Johannesburg amongst the most dangerous cities in the country. Keeping tourists safe and educating them on safety are a necessity to developing a sustainable tourism industry for the city.

3.3.1 What does Johannesburg offer?

Johannesburg has a vibrant arts and dance scene, with a wide variety of live shows on offer throughout the year. The city boasts several theatre venues and locales like the Joburg Theatre to support the flourishing arts and art scene. The city also has a booming and well-developed fashion scene that showcases and has established many local designers.

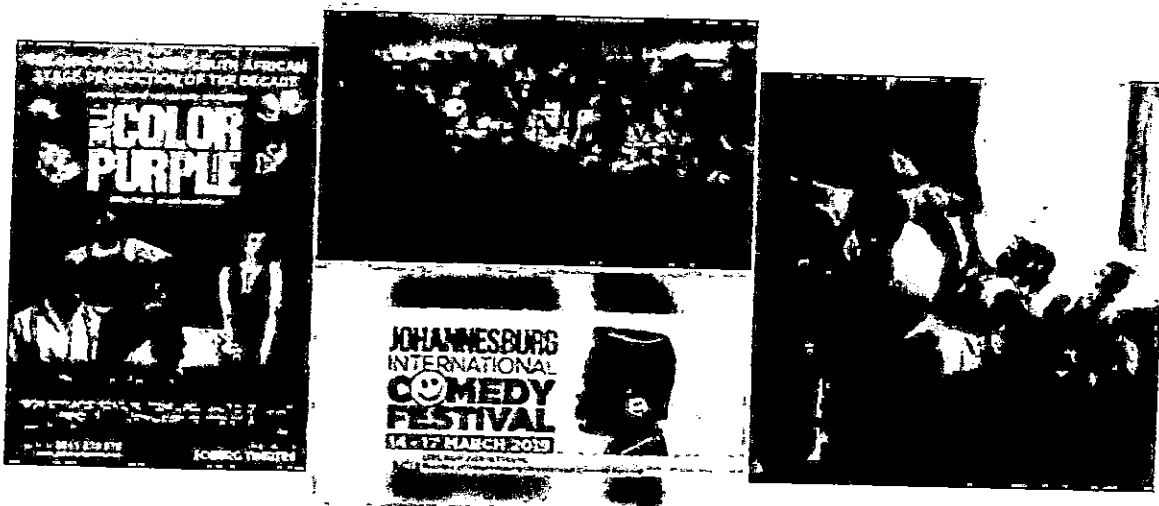


Figure 11: Arts and dance in Johannesburg

In addition to the burgeoning arts and dance scene, Johannesburg is a city that is rich in **history, heritage and culture**. The city offers numerous cultural tours, including tours to the Soweto township and to the Central Business District (CBD) which was abandoned by property owners and underwent "urban blight" in the late 1980s. Tour guides (who are often members of the communities themselves) offer walking and cycle tours to the less popular areas and give tourists the chance to interact with the locals in their everyday



environment. Many tours include visits to historical sites and museums like the Apartheid Museum. The Lesedi Cultural Village in Lanseria is near the city and allows visitors to learn a few skills like throwing Zulu spears and performing traditional dances.

The city offers exciting **food and beverage experiences** like attending wine and craft festivals, enjoying street food, visiting distilleries and attending culinary workshops. Johannesburg has a large variety of restaurants in terms of cuisine and price range to satisfy the needs of all visitors and residents.

MICE and business tourism are well established as Johannesburg effectively capitalises on their status as an economic metropolis and that of Oliver Tambo International as the largest airport in Africa (receiving 21.3 million passengers in 2017) to increase tourist expenditure.

3.3.2 Branding: What is Johannesburg best known for?

Mastercard Global Destination Cities Index named Johannesburg as the most popular African destination city in 2017, with an estimated 4.05 million international overnight visitors and reported Johannesburg to have the highest international overnight spending of USD 2.14 billion. **Shopping** accounted for more than 50% of international visitor's spending, which is not surprising considering that Johannesburg has a few globally renowned malls including Mall of Africa and Sandton City Shopping Centre.

3.3.3 What is Johannesburg doing to boost tourism?

Increasing the safety of tourists

South Africa continues to struggle to implement a working solution to curb crime against tourists and is still largely perceived as being unsafe for tourists. The Department of Tourism remains in process of developing and implementing solutions that will reduce crimes against tourists. There are a few online resources that advise tourists how to stay safe. One of the proposed initiatives is to deploy a Tourism Safety Ambassador Programme that will train and utilise unemployed youths and students from disadvantaged communities to keep tourists safe. In addition to the law enforcement initiatives, providing safe and reliable transport like Uber and the Gautrain have positively contributed to tourist safety.

Empowering SME and BEE participants in the tourism industry

South Africa gazetted a Tourism Black Economic Empowerment (BEE) Sector Code in 2015 to transform the tourism sector and increase the participation of previously racially disadvantaged persons in tourism. The Code is legally binding on all applicable entities involved in the sector and classifies them in three groups based on their annual turnover. The three "types" of organisations are required to apply the provisions of the Code to varying degrees. The Code is focused on three main areas, namely:



1. Ownership; and
2. Skills development; and
3. Enterprise and supplier development.

The Code requires that organisations be assessed and scored, which will affect their revenues as their clients also seek to procure goods from enterprises with healthy BEE scores.

The Code encourages that companies procure goods and services from companies that are at least 51% black-owned. The Department of Tourism has simplified the procurement process from BEE enterprises by creating a publicly accessible online database of BEE suppliers and the types of goods and services that they provide.



TOURISM

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

Welcome to the Tourism B-BBEE website

broadening horizons

Company Name	General Commodity	BEE Class
B-BBEE Level	Grading Level	Province
Tourism Sector		

Figure 12: Snapshot of tourism BEE website

Furthermore, the Department of Tourism's website provides information and resources on how to start a tourism business.

Maintaining quality in tourism establishments

The Tourism Grading Council of South Africa (TGCSA) was established in 2000 benchmark and grade the quality of accommodation establishments and MICE venues according to globally accepted standards. Establishments may voluntarily register for grading. TGCSA awards stars out of five based on various factors including the building's exterior, signage, safety and security, beds, furniture and decoration. Gradings are only



performed by TGCSA accredited grading assessors. Graded establishments are added to TGCSA's website together with the outcome of their grading. TGCSA's grading stars are uniquely identifiable as they are in the colours of the South African flag.



Figure 13: TGCSA stars

TGCSA is the only recognised organisation that performs quality assurance on tourism products in South Africa.

Promoting activities and increasing awareness

There are two main websites that provide centralised information on where to go and what to do in Johannesburg and the Gauteng province, namely Visit Joburg and the Gauteng Tourism Authority's website. Both websites include up to date events calendars and include functionality that allows visitors to plan their itinerary on the website. Businesses can register themselves on the platforms for easy visibility and great publicity.

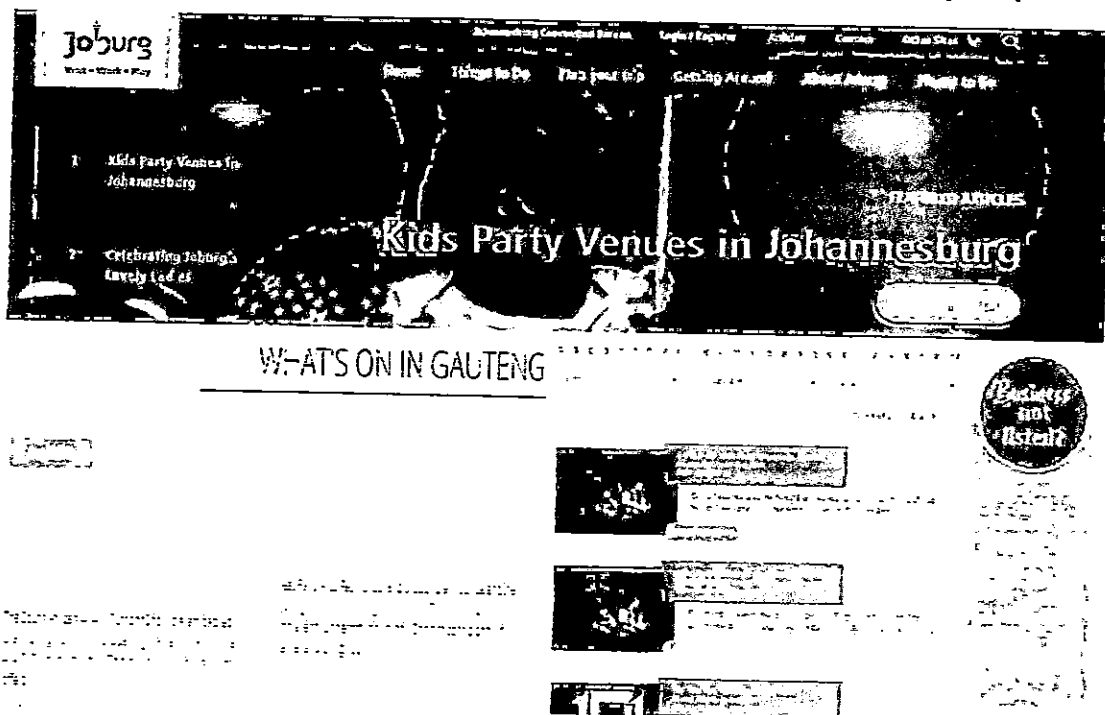


Figure 14: Snapshots of websites promoting Johannesburg city tourism



Visit Joburg further offers a free App that is easy to use on mobile devices and offers a "one-stop-shop" that tourists can use to plan their trips and be out and about for longer.

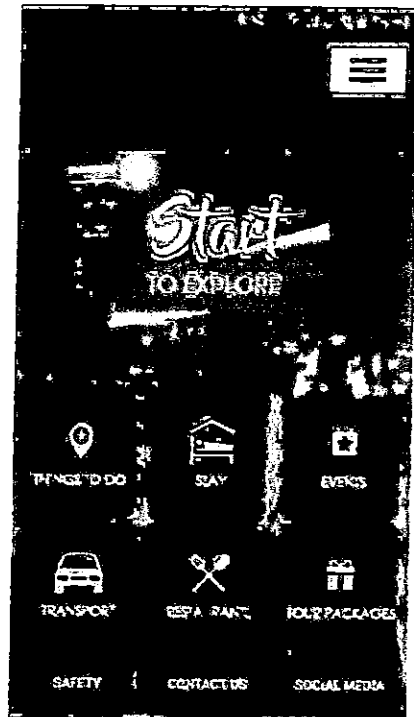


Figure 15: Visit Joburg app homepage



4. WHAT CAN THE CITY OF WINDHOEK LEARN FROM ITS COUNTERPARTS?

4.1 Key Take-aways for Windhoek

Windhoek can learn the following key lessons from its contemporaries:

1. Develop a clear strategy – identify the main target groups to focus the limited resources on developing products and services that cater to their needs.
2. Create and support a business conducive climate – make it easier and faster for entrepreneurs to start their businesses and provide any feedback timeously.
3. Be willing to spend money in infrastructure and initiatives that grow the sector, as per the strategy.
4. All sector participants and policy makers need to work together to ensure the appropriate implementation of initiatives and activities.
5. Execute and follow through on decisions decisively and consistently.
6. Involve the community in tourism by educating them and demonstrating that tourism can benefit their daily lives.
7. Make it easier for people to get out and about in terms of safety and transport.
8. Provide one central place where visitors can easily access information on what to do and where to go.





Assessment of sustainable tourism development in Windhoek, Namibia

Baseline study for the preparation of the
'Targeted Windhoek Tourism Development Strategy'

Prof. Dr. Rainer Hartmann
Elena Eckert
Hochschule Bremen – City University of Applied Sciences

November, 2019



**Free
Hanseatic City
of Bremen**



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Table of contents

1. Introduction	8
1.1 Research objectives	9
2. Research environment in Namibia	9
2.1 External conditions in Namibia	10
2.2 Local circumstances in Windhoek	13
3. Principles of sustainable development	15
3.1 Sustainability in tourism and approaches to sustainability assessment	16
3.2 Sustainability seals in Southern African tourism	17
4. Methodology of sustainability assessment in the City of Windhoek	18
4.1 Criteria and indicators for the evaluation of sustainable tourism	19
4.2 Data collection methods	20
4.3 Data analysis methods	26
4.4 Performance rating and dimension evaluation method	27
5. Detailed results: Sustainability dimensions in the case of Windhoek	29
5.1 Management dimension	29
5.2 Economic dimension	47
5.3 Socio-Cultural dimension	67
5.4 Ecological dimension	88
5.5 Extended analysis	105
6. List of recommended actions for the City of Windhoek	106
7. Conclusion	116
8. Bibliography	117

Appendix

- I) Resident survey
- II) Visitor survey
- III) Detailed statistical data resident survey
- IV) Detailed statistical data visitor survey
- V) Greenhouse gas emissions
- VI) Motorised individual traffic by purpose of travel (2016)
- VII) Overview of verifiers for indicator-specific data collection

List of figures

Figure 1 Research design	9
Figure 2 Distribution of income by quintile.....	10
Figure 3 Tourist Arrivals by month 2017.....	12
Figure 4 The four dimensions of sustainability	16
Figure 5 Sustainability seals in Southern African tourism.....	17
Figure 6 Hierarchical framework for the formulation of criteria and indicators.....	20
Figure 7 Age distribution among tourists	24
Figure 8 Age distribution among residents	24
Figure 9 Zoning map for observation in Windhoek	25
Figure 10 Safety note by city police in central Windhoek	38
Figure 11 Promotional material from the tourist information office.....	43
Figure 12 Location of certified tourism businesses in Namibia	45
Figure 13 Degree of fulfilment management dimension	46
Figure 14 Degree of fulfilment economic dimension.....	66
Figure 15 Top tourist attractions in Windhoek	70
Figure 16 Degree of fulfilment socio-cultural dimension	87
Figure 17 Sign to increase awareness about water conservation at the Craft Centre.....	97
Figure 18 Sign to increase awareness about waste reduction at the Craft Centre.....	97
Figure 19 Damaged walkway on Independence Avenue.....	99
Figure 20 Main means of transportation by tourists in the City of Windhoek	100
Figure 21 Parcs and green spaces in Windhoek central	103
Figure 22 Results ecological dimension	104
Figure 23 Degree of fulfilment ecological dimension	104
Figure 24 Degree of fulfilment for each dimension of sustainability	105
Figure 25 Crossing between Christ Church and Independence Memorial Museum	107
Figure 26 Misleading sign on container in Independence Avenue.....	107
Figure 27 Entrance of the current Tourist Information	107
Figure 28 Signposting in Windhoek.....	108

List of tables

Table 1 Strengths and weaknesses of Windhoek.....	15
Table 2 Evaluation of the sustainability dimensions	27
Table 3 Combined dimension evaluation	27
Table 4 Scales of sustainability.....	28
Table 5 Results management dimension	46
Table 6 Tourism & Hospitality Sector Workforce Profile 2017/2018	51
Table 7 Tourism & Hospitality Sector Workforce Profile 2017/2018	57
Table 8 Results economic dimension.....	66
Table 9 Classification of tourist attractions named on the tourism portal	69
Table 10 Results of the visitor survey concerning visitor satisfaction	74
Table 11 Perception of representation of cultural heritage by residents	82
Table 12 Perception of negative impacts due to tourism	83
Table 13 Perception of increase in expenditure caused by tourism.....	84
Table 14 Results socio-cultural dimension	87

List of abbreviations

CBD	Central Business District
CBNRM	Community Based Natural Resource Management
DAC	Development Assistance Committee
DEA	Department of Environmental Affairs in the Ministry of Environment and Tourism
DoT	Directorate of Tourism and Gaming in the Ministry of Environment and Tourism
EAPAN	Environmental Assessment Professionals Association of Namibia
EIA	Environmental Impact Assessment
ETIS	European Tourism Indicator System
GIZ	Gesellschaft für Internationale Zusammenarbeit
GSTC	Global Sustainable Tourism Council
HAN	Hotel Association of Namibia
HDI	Human Development Index
IPCC	Intergovernmental Panel on Climate Change
MET	Ministry of Environment and Tourism
MSME	Micro, Small and Medium Enterprises
NATH	Namibian Academy for Tourism and Hospitality
NSA	Namibia Statistics Agency
NTA	Namibia Training Authority
NTB	Namibia Tourist Board
NUST	Namibia University of Science and Technology
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development
OHCHR	Office of the United Nations High Commissioner for Human Rights
PDM	Popular Democratic Movement
POI	Point of interest
POS	Public Open Spaces
TAN	Tour Guide Association Namibia
TASA	Tour and Safari Association of Namibia
SDG	Sustainable Development Goals
SWAPO	South-West Africa People's Organisation
UNEP	United Nations Environment Programme
UNWTO	World Tourism Organization
WMARS	Windhoek Managed Aquifer Recharge Scheme

1. Introduction

The development policy guidelines of the Free Hanseatic City of Bremen describe the city's efforts with regard to development cooperation in the global South. The aim of these efforts is to contribute to poverty reduction, ecological sustainability and the strengthening of human rights and democracy worldwide. As part of these international efforts, an initiative was launched in 2001 to support the development of the Namibian city Windhoek. In recent years, projects on sustainability in particular have been carried out in the form of cooperation between the two cities. Bremen and Windhoek have cooperated on various projects in the past and are bound by a city partnership agreement. The City of Windhoek has approved a new 'Targeted Windhoek Tourism Development Strategy' in 2018. The successful bidder, PricewaterhouseCoopers was confirmed and the project started from July 2018.

In view of the fact that the tourism strategy should also include sustainable aspects, a cooperation with the Free Hanseatic City of Bremen and the University of Applied Sciences Bremen was initiated. The objective of the research team from Bremen is to analyze, evaluate, and assess the impact of tourism in the Windhoek. The objectives of sustainable tourism development are based on four main target areas. Institutional, economic, socio-cultural and ecological aspects are analyzed in order to give recommendations for further sustainable tourism development in Windhoek. The central idea of sustainable development is the maximisation of positive impacts and the minimization of negative impacts in the respective sustainability dimension.

Highlighting the significance of tourism on political level can develop greater awareness and understanding of the substantial contribution of tourism. The central aspects of sustainable tourism are the promotion of equity and development, improvement of quality of life in the host community, provision of high quality experience for the visitor and the conservation of the environment (Mason 2010, p. 109).

Since Windhoek is a city destination, topics like cultural tourism are of particular importance. Many Southern African countries in the region have identified the development of cultural tourism as one of the key growth areas in tourism (Saarinen 2016, p. 409). Namibia needs to be distinguished from other Southern African countries due to its history and the set-up of the economy. This is why this study takes the following topics into special consideration. Namibia is among the countries with the most pronounced unequal distribution of wealth worldwide. This has to do with Namibia's colonial legacy which transferred wealth to a limited group of individuals at the expense of the greater number. Another factor that will be reviewed in this study is the high unemployment rate in Namibia, the issue of landownership and the scarcity of water in the city.

1.1 Research objectives

The research design of this study is exemplified by figure 1.

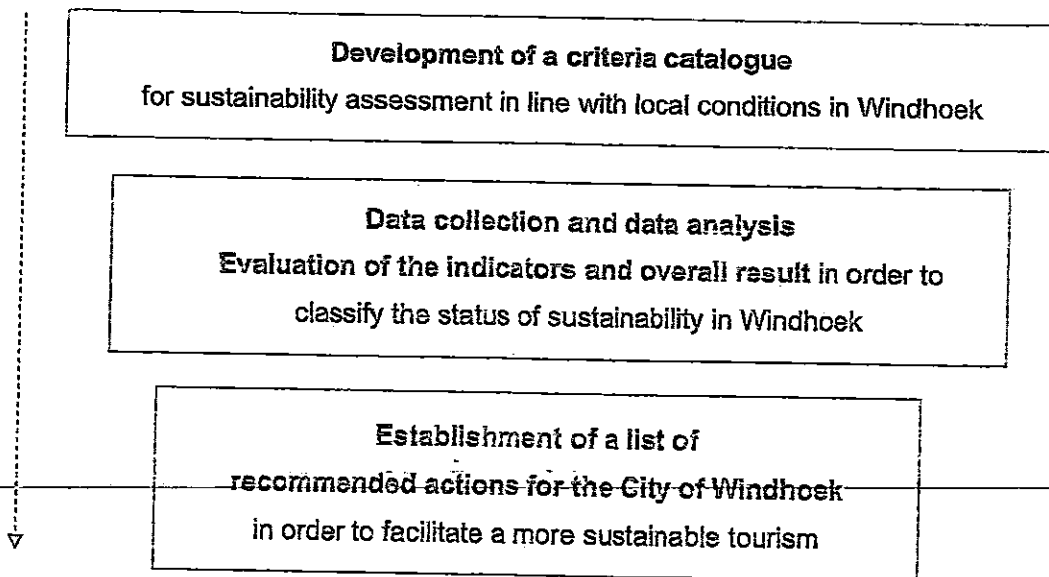


Figure 1 Research design (Source: Own figure).

The first chapter of this study focuses on the research environment in Namibia and local circumstances in Windhoek. In a next step, the principles of sustainable development in tourism will be presented. Subsequently, the research methodology will be described. This includes the set-up of the assessment tool, the data collection method, data analysis method and the evaluation method. The data for this study is collected using expert interviews, interviews with tourism enterprises, observations on site and surveys with locals and tourists. The data is then evaluated using the qualitative content analysis and a statistics programme. Following that chapter, the results will be presented dimension by dimension and finally evaluated with the help of a rating and evaluation methodology. Based on the results, recommended actions for the City of Windhoek in order to strengthen sustainability in tourism are listed. Finally, the scope and limitations of the work are described and the conclusion is drawn.

2. Research environment in Namibia

This chapter focuses on the conditions for research in Namibia. Every country has its own respective conditions that can be attributed to history, culture, society or politics. When conducting scientific research in a specific context, an in-depth knowledge of the area of interest is a key component. Understanding the motivation of stakeholders and prevailing structures facilitates a better communication when it comes to the implementation of new strategies. This is why the following chapter will analyse the external conditions in Namibia and local circumstances in Windhoek. Especially history and economic conditions will be assessed, keeping tourism development in mind.

2.1 External conditions in Namibia

The following chapter focuses on external historical and economic circumstances in Namibia that are closely linked to the current challenges. The chapter focuses on the current economic situation in the country stating data on inequality issues and their underlying basis. Finally, the last part of the chapter provides the reader with an overview of tourism data in Namibia and Windhoek, allowing for a better understanding of the sectors economic value and relevance.

The Development Assistance Committee (DAC) refers to Namibia as a Upper Middle Income Country according to the DAC list of ODA-eligible (Official Development Assistance) countries (OECD 2018). Namibia has a Human Development Index (HDI) of 0.647 which places it in the category of *medium* human development (United Nations Development Programme 2019). Unlike other indicators the HDI emphasizes "that people and their capabilities should be the ultimate criteria for assessing the development of a country, not economic growth alone" (United Nations Development Programme 2019). Another indicator for economic development is the Gini coefficient. It is a "measure of the deviation of the distribution of income per individual or households within a country from a perfectly equal distribution. A value of 0 represents absolute equality, a value of 100 absolute inequality" (Human Development Reports 2013). The most recent figures from 2015 assigns Namibia a Gini coefficient of 59.1 being one of the highest values worldwide (The World Bank 2019). The unequal distribution is rooted in the historical development of income patterns, which continue to shape society to this day. Figure 2 shows the share of total income distribution in the country by quintile from poorest to richest. It becomes evident that even in 2015 more than 60% lie with the richest fifth of the population.

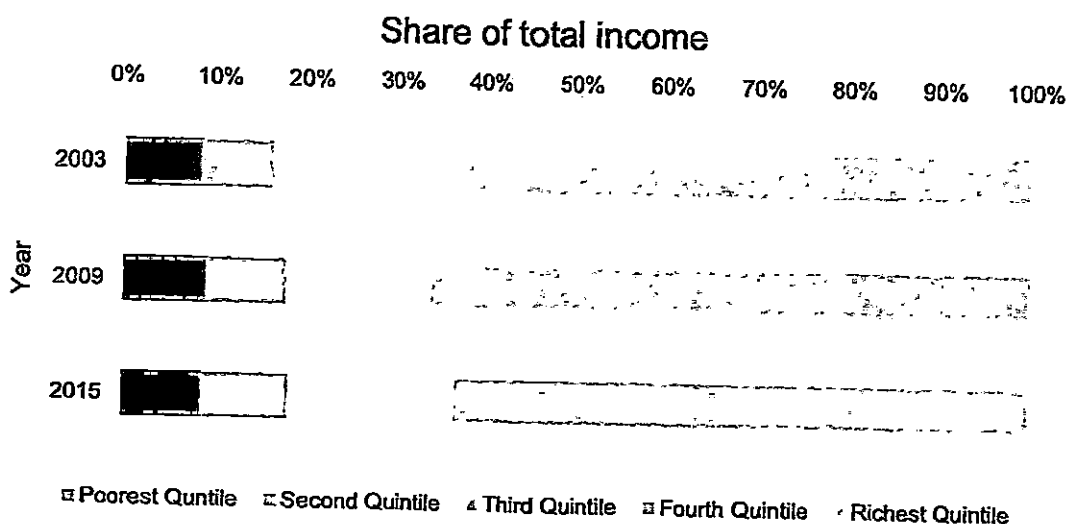


Figure 2: Share of total income by quintile for the years 2003, 2009 and 2015. Source: World Bank (2019).

This distribution is largely due to the fact that the black population was excluded for a long time while the Boers, Germans and English secured political and economic power for themselves. Even today after the white Namibians have almost completely withdrawn themselves from politics, they remain active in entrepreneurship. Despite the fact that only 1% of the population still has purely German roots, they play a major role in the economic, social and cultural spheres. This way the value and what one perceives in everyday life is much greater and much more prominent than the mere figure of 1% (Welt 2019). Despite the fact that the German colonial period only lasted for approximately 30 years its influence on the country's identity is incomparable to the South African influence. Even though streets have been renamed and various monuments haven been erected in honor of the heroes of the liberation struggle, it is peculiar that German monuments have been left mostly untouched (Rodrian 2009, p. 31). German colonial heritage is often a symbol of oppression, foreign rule and nationalism but still forms part of many cities, among them Windhoek. Not only concerning historic sites but also in respect to economic and cultural aspects, the German influence on Namibia is still strongly pronounced to this day (Rodrian 2009, p. 23). Besides the historically evolved cultural and economic structures, the topic of landownership contributes to the lasting inequality in Namibia. Like many other southern African countries, Namibia has experienced land expropriation on a grand scale. Modalities of possible land reforms between the black ethnic groups have by no means been clarified and there is a complex structure of land claims (Hunter 2004, p. 3). The question of whether the land should be returned to its former owners (restitution) or simply redistributed to disadvantaged population groups (redistribution) has still not been clarified everywhere (Rodrian 2009, p. 32). One way of finding a solution to the unresolved question of land distribution is by so-called conservancies. The Community Based Natural Resource Management (CBNRM) approach has been established in rural areas, where communities are actively involved in nature conservation and enjoy rights of ownership over natural resources in their native country (Beckert 2014, p. 19). The strategies and laws of the CBNRM programme are cited as examples of how historical inequalities can be overcome (Beckert 2014, p. 61).

The redistribution of wealth is not only limited to measures of this kind. The current president of Namibia, Hage Geingob drafted a new bill on the New Equitable Economic Empowerment Framework (NEEEF) in 2017, which would make it "mandatory for white-owned businesses to sell a 25 percent stake to blacks" (Nyaungwa 2017). Some argue that "Namibia [has] not seen significant transformation in the 27 years of independence from apartheid" manifested by "overwhelmingly dominant business ownership" by Namibia's white population (Nyaungwa 2017). The proposed empowerment plan failed as it was heavily criticized. The main arguments were based on the fact that "empowerment initiatives should not lead to distinctions based on race, as it would negatively impact race

relations" and that existing empowerment efforts should rather be increased so that poor Namibians of any origin would benefit (Nyaungwa 2017).

In conclusion it can be noted that the separation of rich and poor Namibians is still strongly determined by ethnicity and that the unresolved issues of a land reform and economic empowerment remain contributing factors.

The following paragraph gives a short overview on economic tourism figures in Namibia. Since the study is focused on Windhoek this information is aimed to act as an anchor to exemplify the value of tourism in Namibia and not at taking away from the main research object. It has to be noted that data collection and monitoring is done on a national and constituency level but not for individual cities, which result in a lack of available data for Windhoek. Since its independence Namibia has recorded a strong increase in tourist arrivals. In 2017, the foreign arrivals were 1.6 million which is a 2.2% increase from 2016 (MET 2017, p. 4). The number of tourists in Namibia is expected to rise to more than 1.7 million tourists in 2020, which is notable, considering the country has only 2.3 million inhabitants. 78.4% of overseas tourists indicate leisure/ holiday as the main purpose of their trip, while 55.7% of African travellers identify visiting friends/ relatives as the main purpose (MET 2017, p. 7). The contribution of travel and tourism to total employment was 15.7% in 2019. The total contribution of travel and tourism to the GDP amounted to 10.9% in 2019 (WTTC 2019, p. 1). Data on arrivals, employment and GDP contribution for Windhoek in particular is not published. 27% of the total tourist arrivals in Namibia originate from overseas with Germany being the most dominant market with 8.2% in 2017 (MET 2017, p. 8). Figure 3 shows the distribution of monthly arrivals in 2017.

Tourist arrivals by month, 2017

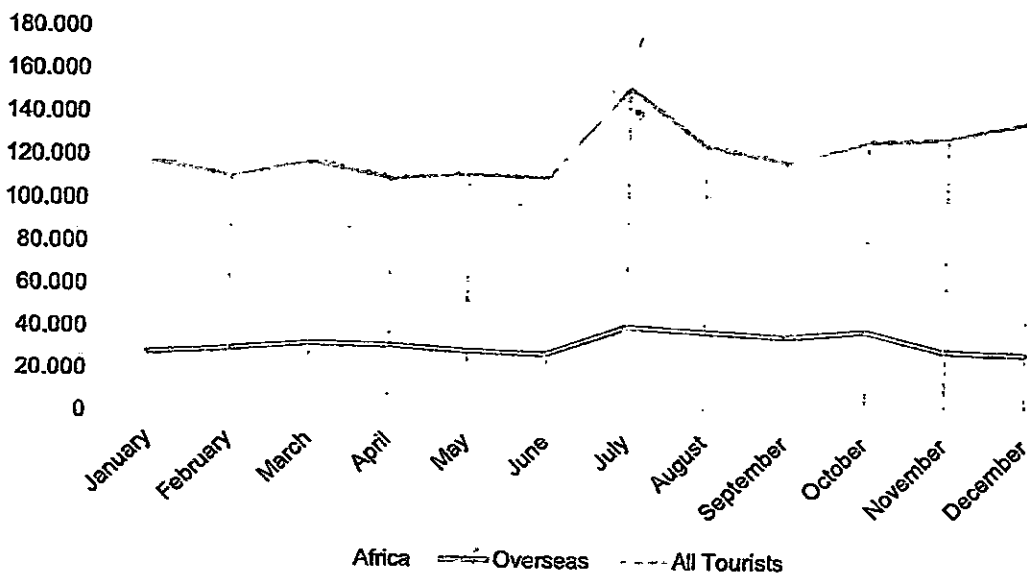


Figure 3: Tourist arrivals by month, 2017. Source: MET 2017, p. 8. ET 2017, p. 28.

July was the preferred month for travelling to Namibia with 10.3% of tourist arrivals, followed by December with 9.4% of arrivals (MET 2017, p. 26). The most visited urban centres in Namibia are Windhoek and Swakopmund (MET 2013, p.21). Windhoek is visited by 70% of all holiday tourists (MET 2013, p.21). International tourists spend around one tenth of an average of 11.6 days of their stay in Windhoek (Marschall 2013, p. 76). This allows for the conclusion that the data on overseas travelers' seasonality can be transferred to Windhoek since the city is usually used as an entering or exiting point. Same goes for the nationality of travelers. Further information on how Windhoek acts as a gateway for travelers will be given in the following chapter.

2.2 Local circumstances in Windhoek

After an examination of the external conditions in Namibia has been carried out, this chapter will deal in more detail with the local circumstances in Windhoek. Windhoek will be examined under geographical, socio-cultural and touristic aspects.

Windhoek is located in the Khomas region, which is divided into ten constituencies: John Pandeni, Katutura Central, Katutura East, Khomasdal, Moses IlGaroëb, Samora Machel, Tobias Hainyeko, Windhoek West, Windhoek East and Windhoek Rural (Khomas Region Council 2019). The Khomas region is split up into the escarpment of the Khomas Hochland and the inland plateau. The city is surrounded by three main mountain ranges named Eros mountain, Auas mountain and Khomas Hochland. For this reason, hills and valleys dominate the cityscape. The main urban centre of the Khomas region is Windhoek. The city has a total area of 5,133 km² and a population of 334 580. Being the capital city, seat of government and therefore administrative, legislative and judicial centre of the country, Windhoek plays a crucial role for the countries' economy and welfare (The City of Windhoek 2017, p. 6). The City of Windhoek disposes of a good road infrastructure, water and electricity supply, telecommunication and digital infrastructure, hospitals, banks and financial institutions, restaurants, shopping facilities and hospitality. Windhoek is linked to the national railway system and to all major roads. The main point of entry for visitors is the Hosea Kutako International Airport located 30–45 minutes from the city. It is worth noting that 90,7% of the total of tourist arrivals to Namibia by air take place via this airport (MET 2017, p. 21). Thus, also making it the gateway to Namibia for 84,0% of international tourists from Europe and North America (Steinbrink et al. 2016, p. 25). This means that the vast majority of overseas visitors start and end their stay in Windhoek. Many visitors begin their itinerary directly at the airport by renting vehicles right after their arrival and by driving off to the country side immediately on their first day. For most holidaymakers, a stay in the city is therefore not usually part of the programme but primarily rather serves as a start and ending point (Steinbrink et al. 2016, p. 26). The majority of travellers spend the first and last day of their stay in Windhoek, using this time to run errands, organize their trip, buy souvenirs and groceries and visit a few relevant sights (Rodrian 2009, p. 96). Compared to the other

activities that the tourists have planned during their stay in Namibia, Windhoek seems rather boring and like it has very little to offer. The image of the city is largely characterised by its administrative function and is still considered rather 'un-African' which makes it particularly unattractive to overseas-visitors (Steinbrink et al. 2016, p. 26). This impression is compounded by the fact that moving around Windhoek can be difficult and time-consuming. Holidaymakers that come to Windhoek as part of an organised tour usually visit the main tourist attraction with their tour bus and a tour guide. Travellers with individual itineraries will mostly be found walking around the city centre, exploring the sights in closest proximity. Despite the fact that the country's dominant focus lies on nature and wildlife tourism, city tourism and cultural tourism have gained importance over the last years (Steinbrink et al. 2016, p. 25). Windhoek is the centre for colonial-heritage tourism (Rodrian 2009, p. 44). Historic buildings and monuments from the German colonial period are still marketed with emphasis and generate high visitor numbers. Among them the Alte Feste, Christuskirche, Windhoek Train Station and Tintenpalast are of greatest significance. Besides the colonial places of interest, a number of sights displaying Namibia's independence and the more recent history have enlarged the list of existing attractions. Among them is the Independence Memorial Museum, which is devoted to apartheid history and the liberation struggle of Namibia and the Heroes' Acre at the outskirts of the city (Steinbrink et al. 2016, p. 26).

In addition to that, tourists can enjoy the Craft Market in central Windhoek, displaying Namibia's rich art heritage. A variety of stalls offer handicrafts such as paintings, jewellery, woodcarving and textile products (Saarinen 2016, p. 412).

Most of the main tourist attractions are located in the central business district (CBD) within walking distance from each other. Other main areas of interest however, are located outside the CBD. In order to grasp the layout of the entire city it is important to understand the underlying historic structures, which are still visible today. The essence of the apartheid city was the spatial separation of the 'races' defined by the South African government and a restriction of freedom of movement, especially of the black population. The district Katutura was founded in the 1950s as a settlement for blacks and was the result of colonial and apartheid urban planning aimed at the spatial separation of the white, coloured and black population (Seckelmann 1998, p. 223).

Despite the end of this rule the spatial separation can still be seen in the layout of the city. Areas inhabited by white residents like Klein Windhoek on one side of the CBD contrast settlements like Khomasdal, which is mostly inhabited by coloureds or Katutura in the north-west, where the majority of Windhoekers live and which is mostly inhabited by the black population. In recent years these rigid structures have softened and an influx of people with different cultures moving around different parts of town can be noted. This new understanding of diversity and cultural exchange has caused township tourism in particular to establish itself in Windhoek in recent years, transforming the former Katutura township

into an integral part of city tours (Rodrian 2009, p. 42). Integrating the visit of Katutura into the tourism product highlights the city's cultural diversity and its heterogeneous structure. The former slogan of the city marketing used to be 'City of many Faces' but has now been changed to 'Gateway to endless opportunity'.

It becomes evident, that the appeal of Windhoek lies within its many facets which reflect the distinctness of various cultures and their heritage. Shaping a tourism product out of this conglomeration of attractions is a difficult task. Table 1 highlights the main strengths and weaknesses of Windhoek from a tourism perspective.

Strengths	Weaknesses
Availability of goods and services	Transportation in the city due to insufficient public transport facilities
Diversity of different cultures and ethnicities	Crime and insecurity
Rich cultural heritage	Lack of African image
Existence of many attractions	No possibility to experience the attractions
Cleanliness	Lack of information for visitors
	Closing hours of businesses and tourism attractions

Table 1 Strengths and weaknesses of Windhoek (Source: Our tests based on Steinhilber et al. 2013, p. 27)

Encouraging tourists to spend more time and money in Windhoek before heading off to the rest of the country is a matter of communication and valorisation of the existing resources. Tourism and business operations are mainly owned and run by the white minority. Ownership and participation structures are rigid and have been manifested over years. Local residents have little benefit from tourism and residents of disadvantaged city areas hardly get in touch with the tourism product. This situation can only be changed by empowering and encouraging locals to engage into tourism businesses and by conveying the possible turnover of this industry and its entering possibilities. This is why this study will mainly focus on social and economic aspects of sustainable tourism management.

3. Principles of sustainable development

The following chapter will introduce the concept of sustainability in the tourism sector. Moreover, the tools for the assessment of sustainability in tourism destinations will be presented and the current availability of sustainability seals in African tourism is discussed. The Global Sustainable Tourism Council (GSTC) defines sustainability as "using resources in an environmentally responsible, socially fair and economically viable manner, so that by meeting the needs of current users, the possibility of their use by future generations is not compromised" (GSTC 2019a). Tourism can act as a catalyst enabling sustainable businesses practices in a destination.

3.1 Sustainability in tourism and approaches to sustainability assessment

The objectives of sustainable tourism development are based on four main target areas. These are referred to as institutional or management dimension, economic dimension, socio-cultural dimension and ecological dimension. The central idea of sustainable development is the maximisation of positive impacts and the minimization of negative impacts in the respective dimension (Hartmann and Stecker 2019, p. 3).

Figure 4 illustrates that the management dimension has touchpoints with every other dimension because it is responsible for sustainable governance mechanism and securing legal and organisation framework. The economic dimension covers tourism earnings, government revenues, employment and the contribution to regional development. Potential negative impacts are inflation, opportunity cost and an over-dependence on tourism (Mason 2010, p. 45–46).

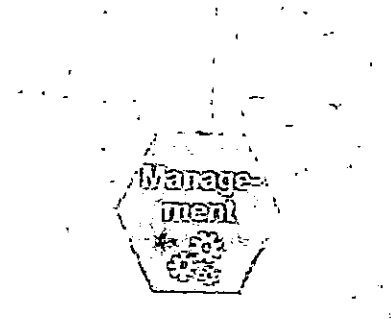


Figure 4 The four dimensions of sustainability (Source: Own figure based on German Tourism Association 2017)

The socio-cultural dimension mainly focuses on the benefit of tourism to local communities, cultural heritage and visitor management. The ecological dimension is concerned with natural resources, the conservation of the environment and the protection of these assets against tourism influences. The key components of any sustainability assessment should be promoting equity and development, improving the quality of life in the host community, providing a high quality of experience for the visitor and maintaining the quality of the environment (Mason 2010, p. 109).

The field of tourism research has concentrated on sustainable tourism and its development for quite some time. This is why, various approaches for the assessment of sustainable tourism have been developed. Most systems are based on a number of criteria and indicators that evaluate the performance of a touristic destination or enterprise according to the four dimensions of sustainability. An important objective for "sustainability assessment [is] to define the areas where corrective actions would be necessary and to evaluate if the chosen mitigation measures will lead to the desired improvement of the situation" (Schianetz et al. 2007, p. 372).

Due to the fact that various approaches for the measure of sustainable tourism have already been developed, a number of criteria and indicator sets is already part of the scientific understanding. The most widely acknowledged organization to publish a set of indicators is the GSTC. The GSTC regulations "are the guiding principles and minimum requirements that any tourism business or destination should aspire to reach in order to protect and

sustain the world's natural and cultural resources, while ensuring tourism meets its potential as a tool for conservation and poverty alleviation" (GSTC 2019b).

Further details about the set-up of the criteria catalogue used in this study will follow in chapter 4.

The criteria catalogue for sustainable tourism can be used for tourism enterprises as well as for destinations. In the latter case, it can help the DMO to identify warning signs and fields that require action, it can act as a tool for communication and for informing relevant stakeholders, it can initiate exchange between important tourism player and act as a comparative medium over a period of time or between other destinations that were assessed based on the same system (Rein and Strasdas 2017, p. 310). As of now, certification systems for destination are typically developed on a continent- or national-level. The complexity of destination management and the individual circumstances in each destination contribute to the difficulties in finding a global approach. The following chapter will give an overview of the current certification landscape in Southern Africa.

3.2 Sustainability seals in Southern African tourism

The following subchapter focuses on sustainability seals in Southern Africa, mainly concentrating on initiatives in Namibia and its neighbouring countries.

These certifications are the most widely recognized seals for African tourism destinations: Tourism Excellence Uganda by TourtCert, Kenya Eco-Rating Certification Scheme, Responsible Tourism Tanzania and the Green and Ecotourism Certification Program Botswana. South Africa has a number of seals, among them Fairtrade Tourism South Africa, Greenline Certification South Africa, Green Tourism Active (GTA) South Africa and The Green Leaf™ Eco Standard South Africa. The only certification scheme in Namibia is Eco Awards Namibia. Figure 5 illustrates the most relevant certifications in order to facilitate the understanding of the following introduction of each seal.

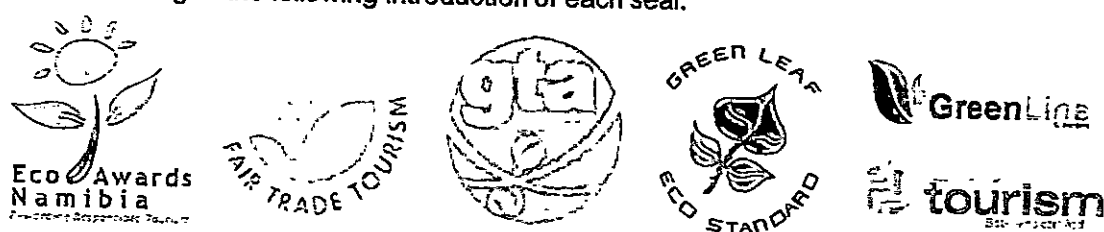


Fig. 5 Sustainability seals in Southern African tourism (Source: © 2019 Eco Awards Namibia, Fair Trade Tourism, Green Tourism Active, Green Leaf Eco Standard, Green Line and Eco Tourism Botswana).

Apart from the fact that many certifications exist, their market penetration is relatively small. "This structure calls for an optimization and adaption of existing systems to the prevailing conditions of the different nations focussing on Southern African countries in particular" (Ecotrans 2019).

Fair Trade Tourism South Africa promotes "fair and responsible business practice across Africa through [a] membership and certification programmes (Fair Trade Tourism South

Africa 2019). They operate as a non-profit organisation and became a GSTC members in 2015 (GSTC 2019). GTA is a more complicated system that involves four stages of certification. It aims at accommodation, tour operators, restaurants, wine farms, retailers and shopping centres. GTA is a GSTC recognised standard and member of the GSTC (Green Tourism Active 2019). Green Leaf offers "certification assessment tools for the performance management of any international organisation or property" (The Green Leaf TM Eco Standard 2019). Their certification does not include destinations. Green Line offers responsible tourism products to customers as well as certification for tourism businesses (Greenline Certification South Africa 2019). The Botswana Tourism Organization became a GSTC member in 2011. They offer the Botswana Ecotourism Certification System (GSTC 2019).

None of these organisations offers a certification of destinations. Since their focus is mostly on rural accommodation, little relevance for city tourism can be derived.

The Namibian certification called Eco Awards was formalised in 2007. The organisation is based on a "partnership of institutions, both civil society and government, that have come together to form an Alliance to promote and facilitate sustainable tourism in Namibia." Among the partner organisation are the City of Windhoek and the NTB (Eco Awards Namibia 2019). They focus on the certification of accommodation establishments and tour operators. Between two and five desert flowers are awarded depending on the degree of compliance. There are three tour operators and four accommodations certified in the City of Windhoek (Eco Awards Namibia 2019). Their criteria catalogue takes local conditions in Namibia into consideration. Social aspects like fair employment, discrimination, training and medical aid are covered. Environmental aspects like the dry climate, water shortages and threats to wildlife are also taken into account. That makes their criteria catalogue a best practice example for further research in Namibia. Some indicators from the Eco Awards Namibia catalogue also contribute to this study as they emphasize country-specific factors that global catalogues like the GSTC cannot cover. The set-up of the criteria catalogues for this study will be explained in more detail in the following chapter.

4. Methodology of sustainability assessment in the City of Windhoek

This chapter explains the methodology that is used to structure, collect, analyse and evaluate the data for this study. In the first subchapter the set-up of the criteria catalogue will be explained. The second subchapter focuses on the data collection methods used in this study. Subsequent to this, the method of data preparation and processing is explained. The chapter finishes off with the presentation of the evaluation approaches that are used in this study to classify the indicators.

4.1 Criteria and indicators for the evaluation of sustainable tourism

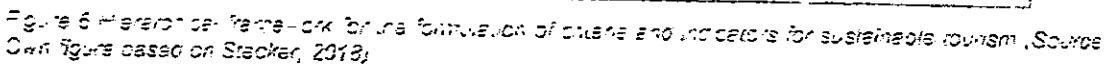
The following chapter introduces the method that is used to set up the criteria catalogue for this study. Before the development of criteria and indicators can take place, a goal level has to be established. The overall goal for this study is the long-term development of sustainable tourism. The tourism sector should “embrace the principles of sustainable tourism and focus on the achievement of sustainable development goals (SDGs)” (UNWTO 2013, p. 17). Tourism development should respect economic, social and environmental impacts which is why the UNWTO and the UNEP have identified 12 aims for sustainable tourism. They endeavour to deliver “economic benefits to destinations and communities, through competitive, viable tourism businesses that create employment, as about minimising adverse impacts on the environment” (UNWTO 2013, p. 19).

The goals that are identified for each of the four dimensions are translated into criteria in order to identify subject areas that contribute to the achievement of the goals. A variety of organization has already developed criteria catalogues for tourism destination since the topic has been part of tourism research for some time. As described in chapter 3.1, the most prominent organization is the GSTC. The criteria used in this study are not only based on the GSTC, but also consider criteria catalogues of other organisations. The first one of them is the European Tourism Indicator System (ETIS) which has been developed by the European Commission. Moreover, the ‘Guide to Sustainability in German Tourism’ by the German Tourism Association is considered as best practice. Apart from that, the criteria catalogue of parastatal organisations and certification businesses was used. Among them are the Eco Awards Namibia accommodation and tour operator criteria, which provide insight into local conditions (see chapter 3.2). Aspects from the destination catalogue of TourCert and the Kenya Green Destination Guidelines have also been added to the criteria catalogue for this study.

In a third step, indicators that “define the criteria with quantitative or qualitative parameters” are added to the criteria catalogue (Hartmann and Stecker 2019, p. 4). When choosing the indicators, factors like the wording, the measured item and the form of measurement must be considered. The establishment of the catalogue is based on the three criteria of scientific research which are reliability, validity and objectivity. This consideration allows for the possibility “to attain reliable, usable and unambiguous evaluations” (Hartmann and Stecker, 2019, p. 4). Indicators that have a specific relevance for sustainable tourism development in Windhoek are selected to become core indicators. They will be weighted double in the final evaluation. A fourth step consists in assigning a norm to each indicator. A norm is a reference value which is based on international standards or best practices. The norm allows a classification of the indicator depending on its compliance with the norm. This classification is obtained using a rating system of zero, one or two points that expresses the degree of fulfilment with the norm (Hartmann und Stecker 2019, p. 4). In this study 0 points is the worst result and 2 points is the best.

The primary and secondary data collection methods of this study are explained in more detail in chapter 4.2.

Figure 6 illustrates the hierarchical process in the set-up of the criteria catalogue. The colour scheme at the evaluation level will be explained in more detail in chapter 4.4.



The following chapter focuses on the methods that are used to collect data for the assessment of the indicators. The four main methods used in this study are secondary research, expert interviews, tourist and resident surveys and observation on site. The combination of qualitative and quantitative approaches allows the author to collect data on a broader level. Moreover, the combination of multiple verifiers reduces bias and supports a more accurate result. The secondary research takes place before the field research whereas the interviews, surveys and observations are conducted during a field trip to Windhoek between September 09th and September 22nd 2019. The four approaches are explained in more detail below.

Secondary Research

The secondary research focuses on the evaluation of secondary sources. This desktop- and library-based approach allows the authors to collect data from a multitude of sources such as laws, statistics, scientific papers, press releases, governmental reports and strategic plans, destination-level tourism policies and newspaper articles. Marketing material such as the tourism website, brochures, printed items and other communication materials are analysed as well. Secondary research is not only used for the assessment of many indicators but also provides the basis for the content of chapter 2 and 3. Conducting the secondary research before the fieldtrip facilitates a better preparation and understanding of the circumstances on site.

Expert interview

The second method of data collection used in the research design of this study are expert interviews. Sprondel defines an expert as a person with special knowledge which, in contrast to general knowledge, comprises complex, integrated knowledge and is also constitutively related to the exercise of a profession (Bogner and Menz 2002, p. 42). Experts are thus in a position to make subject-related statements on certain topics based on their knowledge and experience. In order to guarantee a broad spectrum of information, representatives of the City of Windhoek, educational institutions, private associations and private entrepreneurs are interviewed. An open, semi-structured interview is chosen for the expert interviews. This allows the interviewee to speak as freely as possible by creating the conditions for an open discussion. The issues addressed in the interview have already been analysed in advance in order to create an interview guideline (Mayring 2016, p. 67). The guideline is also of great importance, as it enables a comparison of the statements in the evaluation of the results. The interviewee should be able to answer freely and should not have any predefined answering options. Depending on the expert's area of expertise, specific questions related to the 70 indicators are posed. The experts are selected according to their relevance for a specific topic and based on exchange on site. Special attention is paid to the consideration of experts from different thematic fields, in order to generate a comprehensive opinion. A total of eight interviews with nine experts is carried out. The following table briefly introduces the experts and explains their field of expertise.

Expert	Field of Expertise
Grace Pujatura with Olehile Thataone and Emma Amukuuaya	City of Windhoek - Tourism Department and Tourism Office
Mary-Ann Kahitu and Olavi Makuti	City of Windhoek - Environmental Department
Clarence Rupingena	City of Windhoek - Strategy Advisor: Smart Cities and Transport
Hazel Milne	Programme Coordinator Eco Awards Namibia

Liesl Liebenberg	NUST Hotel School Manager, NUST Lecturer, Water Crisis Expert
Prosper Mageza	Manager TASA (Tour & Safari Association)
Thomas Müller	CEO Rainmaker digital (Digital marketing and service provider for tourism businesses)

Each interview is recorded using a recording device and then transcribed. In addition to that, another 12 interviews with hotels and restaurants and 6 interviews with tourist attractions are conducted. The interview partner is either an owner, CEO, curator or general manager on site. Each one of these interviews is based on a structured guideline. The questions are partly close-ended multiple choice questions or open-ended questions asking for the existence of certain programmes and items in the enterprise. The focus of these interviews is the collection of data on employment in tourism enterprises and on sustainability efforts taken by the individual enterprises. This is why the interviews are not recorded but only evaluated quantitatively.

Tourist and resident survey

Another instrument of data collection are tourist and resident surveys. The survey is carried out based on questionnaires that have been set-up before the field trip. It is designed for interviews with individual travelers and travelers that are part of a group tour.

Carrying out the survey on site in Namibia entails various advantages. Tourists are physically present in the research area which makes it easier for them to recall their experiences. Impressions have only recently entered their minds and can therefore be reproduced quicker and with more accuracy. When selecting respondents, a balanced cross-section of gender, origin and age is considered. Pedestrians are approached randomly. The questions are asked in face-to-face interviews by the research team and by students from NUST university. All interviews are conducted in English or German using the same guideline. The interviews take place in Central Windhoek at Independence Avenue, Zoo Park, Craft Centre, Christ Church, Independence Museum and the Railway Station. The interviews in Katutura are conducted in Havana, Soweto and Oshetu Market, Katutura State Hospital and Penduka. The evaluation reveals that a total of 82% of all surveys was conducted in the CBD while 18% were conducted in Katutura.

The following section will explain each question of the questionnaire guideline in more detail. The full questionnaires can be found in the appendix. Questions 1-2 of the tourist questionnaire aim at collecting statistical data. They are close-ended questions with one answering possibility. Question 3 is an open-ended question asking for the nationality of the participants. Question 4 focuses on the use of transportation by tourists during their stay and is linked to indicator D5.3. The question is a multiple-choice question with a maximum choice of two answers. Question 5 focuses on the sights visited by tourists during their stay. Based on this question, both the popularity of the individual attractions can be

measured as well as the preference based on the origin of the tourists. This question is a checklist question which gives the participants the freedom to choose one or more of the options available. "It should be ensured that options are placed in a random sequence rather than in any preferential order. Apart from the options selected by the researcher, an option called 'others' should be provided" (Sreejesh et al. 2014, p. 152). This field can help to discover options "of which the surveyor would otherwise have remained unaware" (Sreejesh et al. 2014, p. 151).

Question 6 is linked to indicator C3.5 and is intended to verify whether tourists have sufficient historical and cultural knowledge to be able to properly understand the attractions. Question 7 refers to indicator C4.1 and examines the knowledge of tourists regarding options to financially support the community. Both questions are close-ended questions with an additional option for a free response. Questions 9-13 only refer to indicator C2.5, whereas question 8 also serves indicator A4.3. A Likert-type scale of 1-5 was selected to quantify the degree of agreement with the statement. A choice from 1 (strong disagreement) up to 5 (strong agreement) was formulated. 5 options have been chosen because "most researchers recommend that a middle alternative should be offered in order to prevent respondents who have a moderate or neutral opinion from having to use an alternative category, thereby systematically distorting the data" (Menold and Bogner 2016, p. 6). It was ensured that the wording would always give 1 as the worst result and 5 as the best so as not to confuse the respondents. Question 10 is therefore posed in the negation. It is important that the graphical representation of the scale reflects "the symmetry of the scale and the equidistance of the response options" (Menold and Bogner 2016, p. 10).

The considerations from above apply to the resident questionnaire as well. Questions 1 and 2 refer to statistical data. Question 3 addressing indicator C4.2 and question 4 addressing indicator B5.1 are both close-ended questions with an additional option for a free answer. The aim is to discover programmes that are known by residents of which the researcher, however, is unaware. Questions 5-7 refer to indicator C4.3, C4.4 and C4.5. As with the tourist questionnaire a Likert-type scale of 1-5 was selected to quantify the degree of agreement with the statement. The same considerations as above apply to the choice of scale, the number of options and the order in which they are presented. The only difference is that 1 is the best option and 5 is the worst. Question 8 is another close-ended question with a free comment section that aims at collecting information about the residents' knowledge concerning community involvement for the set-up of codes of conduct at tourist attractions. Question 9 verifies if the respondents work in the tourism sector in order to collect further data about working conditions in the industry. The questionnaire ends here should this not apply. Questions 10-15 are respectively linked to indicator B3.1 – B3.6. Every question is a closed-ended question, asking for a single answer out of the options provided. Since question 11 and 14 ask for very personal information a 'no comment' option

is offered. Question 12 specifies a variety of options, since having working hours and rest periods that are flexible does not necessarily imply that the employer is violating the law. Generally, a high number of close-ended questions has been chosen because they are usually less time consuming and easier to respond to. The questionnaire is discussed with the students from NUST university before conducting interviews, in order to ensure a correct understanding of the questions and to clarify the attitude during the survey.

A total of 126 tourists responded to the questionnaire. The share of 40% females, 57% males and 3% without indication shows a fairly balanced gender ratio.

The age distribution can be found in figure 7. The strong representation of 15-59 year-olds can be explained by their ability to travel overseas and their willingness to participate in an English survey. Packaged-holiday travelers are generally older and have less time since they follow a tight schedule. 61% of respondents originate from a European country, 25% from Namibia or another African country and 13% from other continents. A detailed display of the statistical data can be found in the appendix.

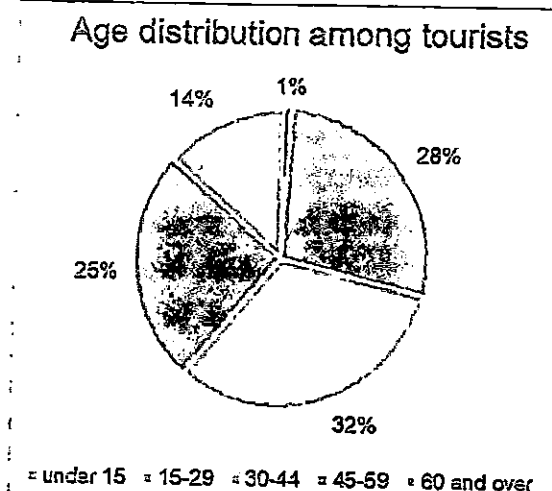


Fig. 7 Age distribution among tourists (Source: Own figure based on own data)

Among the 215 residents 48% of respondents were female, while 51% were male. The age distribution is indicated in figure 8. The overrepresentation of the 15-44 year-olds can be explained by their willingness to answer a questionnaire and by the fact that the working population is more likely to be around in the central business district during weekdays. Out of the 215 residents 73% claimed to work in tourism or a sector directly related to tourism.

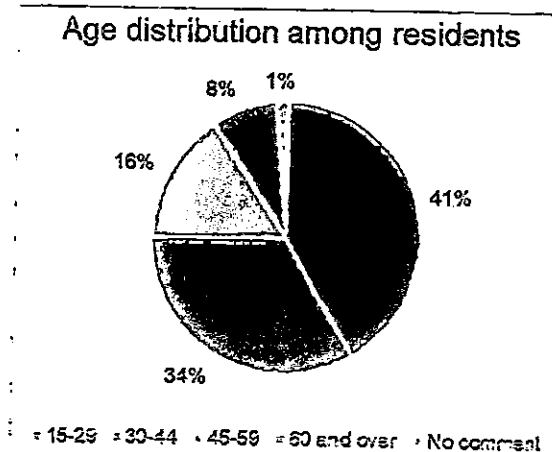


Fig. 8 Age distribution among residents (Source: Own figure based on own data)

Residents taking part in this survey originate from the following cultural backgrounds: Herero, Nama, Ovambo, San, Himba, Damara and German or have a mixed background. A detailed display of the statistical data can be found in the appendix.

Observation

The last method used for data collection is observation. Scientific observation distinguishes between participant and non-participant observation. In this case, the non-participant observation method is used. The observer remains outside the process and observes the situation from the outside. Since this observation does not focus on social interactions, but rather on the existence of different items, the involvement of the researcher is not relevant. The applicable literature distinguishes between structured and unstructured observation. The first case applies to this study in which the researcher adheres to a specific observation schedule (Girtler 2009, p. 62). The structured or standardized observation works with a predefined theoretical observation scheme and fixed observation categories that are applied to the observed object (Lamnek and Krell 2016, p. 531). In this case, checklists that verify individual aspects at the locations of observation are used as an observation scheme. The observation takes place in the field and is unannounced in order to be able to capture the normal situation. The observation is carried out at the following locations in Windhoek: Tourist Information, Hosea Kutako airport, railway station, bus station, transportation hotspots, tourist attractions, hotels and restaurants. In total 25 tourist attractions, 7 hotels and 10 restaurants are observed. The choice of the tourism enterprises that are observed is based on a random selection. Hotels and restaurants that are particularly relevant for tourism are observed in the CBD, Klein Windhoek, Windhoek West and Katutura. The map in figure 9 exemplifies the areas of Windhoek and the geographical distribution of the tourist enterprises around the city.

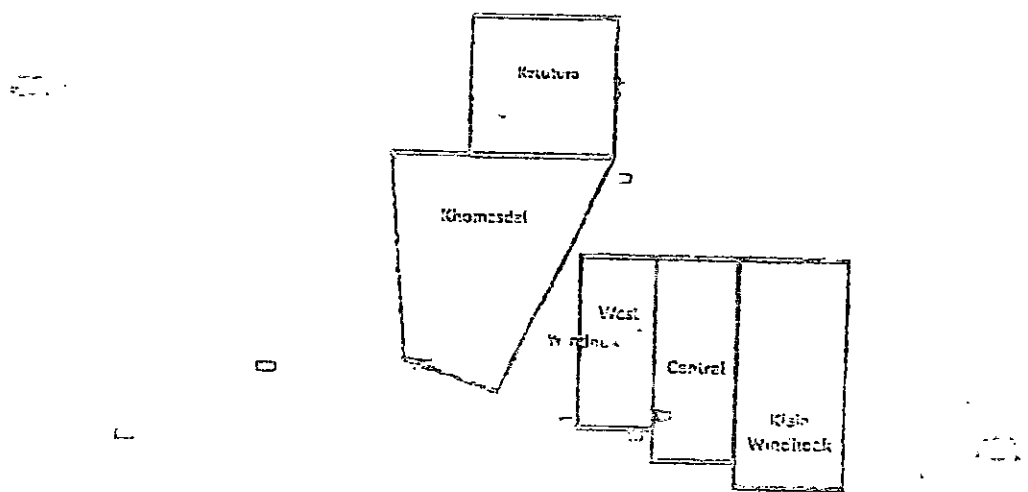


Figure 9 Zoning map (Source: Own map based on Google Maps)

A mixture between high-class hotels, guest houses and hostels is ensured. The restaurants range from high-class establishments to street cafes. The tourist attractions are mostly located in the CBD and Katutura. Others like Heroes Acre or Daan Viljoen Reserve are located outside the city area.

The data is recorded using check lists with check boxes. When recording data, difficulties may occur if this process is not performed at the same time as the observation.

It is clear that the ability of the observer to memorize the situation is limited and that the actual process of memorization is in turn influenced by selective perception that is difficult to control (Lamnek and Krell 2016, p. 574). For this reason, the observed data is recorded directly on site. Every observation must be judged critically due to the subjectivity involved. Increasing the degree of objectivity in this particular observation is attempted by using a clear scheme and by guaranteeing that every observation is conducted by the same researcher. In some cases, a situation does not permit a clear assessment exclusively by observation. For many indicators, what has been observed is therefore verified again by an interview.

4.3 Data analysis methods

The following chapter explains the methods used for the preparation and processing of the collected data. The interviews are interpreted using a qualitative content analysis. The results of the survey and of the observation are processed using Microsoft Excel.

The first step of the content analysis is a transcription of the interview material for further processing. A complete written version of the verbally collected material is produced by literal transcription, which forms the basis for interpretative evaluation (Mayring 2016, p. 89). Since reading exactly transcribed texts can be very difficult, a transfer into normal written English is used as protocol technique in this paper. That means that possible dialects are removed and sentence errors are corrected. This method is used whenever the thematic level of what is said is of central importance (Mayring 2016, p. 91).

The evaluation of the interview material is based on a qualitative content analysis. This technique is centered in the systematic analysis of texts by categorizing the material step by step (Mayring 2016, p. 114). Since the structure of all interview guidelines is based on the indicators, a thematic categorisation has already been carried out. The creation of a category system according to Mayring is therefore obsolete. When assessing the individual indicators, quotes from the transcribed texts are used to determine the rating.

The data collected in the surveys is processed using the statistics programme Excel. Each answer option is entered into a table. The questionnaires are then decoded one after another by recording fulfilment and non-fulfilment with a binary system. This technique allows an uncomplicated reading of the frequency per answer using a sum formula. Socio-demographic data such as age, gender or origin can then be drawn directly using filter functions for the individual features. Answers in the free textboxes are typed in and sorted according to their frequency. The initial design of the questionnaire enables a straightforward evaluation based on this method.

The same technique is used for the observation checklists. Each feature is tagged with a reference to the corresponding indicator and is then marked with a 0 or 1 to indicate its compliance. Accordingly, ratios and shares of specific features within hotels or restaurants can be determined easily.

4.4 Performance rating and dimension evaluation method

The following subchapter explains the evaluation method that is used to determine the degree of fulfilment for each indicator and to assess the general state of the city tourism in Windhoek. After preparing the collected data for further use, each indicator is rated based on the findings from secondary and primary research. The result that was actually measured is compared with the norm, to be able to determine the degree of fulfilment by rating the indicator with 0, 1 or 2 points. In order to classify these results on a dimension-level, an evaluation system is required. "A standard is needed to measure the progress towards (or regress away from) sustainable tourism development, as the assessment of progress cannot be judged and determined unless a standard is provided" (Ko 2005, p. 443).

The tourism researcher Christian Baumgartner uses a so-called traffic light system to classify the individual indicators. This allows for a translation of the 0, 1 and 2 point rating into red, yellow and green. The red category indicates an absolute need for action, the yellow category indicates an alarming limit and the green one indicates a safe condition (Baumgartner 2008, p. 213). Baumgartner then defines thresholds based on which the entire dimension can be rated. The classification can be found in table 2.

Evaluation of the dimension	Result of the individual indicators
Dimension is acceptable	2/3 or more of the individual results in the green area, no result in the red area
Dimension is conditionally acceptable	Less than 2/3 of the individual results in the green area, no result in the red area
Dimension is not acceptable	One or more results in the red area

Table 2 Evaluation of the sustainability dimensions (Classification based on Baumgartner 2008, p. 213)

Based on the evaluation of each dimension Baumgartner then proposes a combined dimension evaluation as per the table 3 below:

Assessment	Sustainability	Condition
Sustainability in tourism	Sustainable	All dimensions green
Predominantly positive	Mostly sustainable	Minimum two dimensions green, none red
Alarming limit, need for action	Little sustainable	One dimension red or more dimensions than green
Problematic in short/ medium term	Unsustainable	No dimension green or more than one red

Table 3 Combined classification of indicators based on Baumgartner 2008, p. 214

It becomes evident, that Baumgartner only describes a destination as fully sustainable if all four dimensions are classified in the green area (Baumgartner 2008, p. 214).

The author opted for adding a different approach to the existing evaluation scheme. The fact that the rating proposed in table 2 results in the non-acceptance of a dimensions if only one indicator is red, which can translate to a share of 5% in some dimensions, calls for a more differentiated approach.

In 1997 the sustainable development researcher Robert Prescott-Allen proposed a measurement tool for sustainability called the "Barometer of Sustainability". This evaluation tool proposes that „the indices of human wellbeing and ecosystem wellbeing are expressed on a performance scale of 0-100. The scale is divided into five sectors: 100-81 good, 80-61 ok, 60-41 intermediate, 40-21 poor and 20-0 bad" (Prescott-Allen 1997, p. 8). The Korean tourism researcher Tae Gyou Ko proposes a more detailed and sophisticated model which assumes "that the 'excellent' condition [...] in system quality is likely to be more 'sustainable', while the 'bad' condition is likely to be defined as more 'unsustainable'" (Ko 2005, p. 439). His five-point scale which is divided into five sectors of 20 points each can be used to explain very precise and complicated information as the scales are divided into more detailed sections. Like Prescott-Allen, Ko measures the status of sustainability with a performance scale. Besides the five-point scale, he distinguishes a three-point scale that can be "useful in explaining relatively simple information to stakeholders" (Ko 2005, 439). Both scales are presented in table 4 below:

Evaluation	Performance rating	Evaluation	Performance rating
Sustainable	68–100%	Sustainable	81–100%
Intermediate	34–67%	Potentially sustainable	61–80%
Unsustainable	1–33%	Intermediate	41–60%
		Potentially unsustainable	21–40%
		Unsustainable	1–20%

Table 4 Scales of sustainability. Own table based on Ko 2005 : 439.

The performance rating of the three-point scale is similar to Baumgartner's approach in table 2, who also divides the total results into thirds. The five-point scale, however, allows for a more precise rating of the dimensions status and facilitates better communication to stakeholders. The calculation method that is used to identify the degree of fulfilment of the entire dimension to be able to classify it as per table 4, is explained in the following. Based on the rating of each indicator and the weighting which depends on the basic or core status of the indicator, a mathematical formula can be used.

$$\frac{\text{Total points}}{(\text{Sum of all quantifiers} \times 2)} \times 100 = \text{Compliance with the goal in \%}$$

In this case, a rating of 2 points equals complete compliance with the dimension goal. A calculation like this can be found in the overall evaluation of each dimension in the chapters 5.1-5.5. A translation of the three-point scale into the traffic-light system is used at the end of each dimension to display the degree of fulfilment in a gauge chart.

Various recommendations can then be derived from the results of the criteria and indicator evaluation. They aim at improving current sustainability efforts or at implementing new

strategies and approaches. The most relevant recommended actions for Windhoek will be explained in a detailed list including a field of action, time frame and potential responsibility.

5. Detailed results: Sustainability dimensions in the case of Windhoek

The following chapter gives a detailed overview of the indicators within the four dimensions. The choice of each indicator and its norm are explained before rating each indicator based on the findings from the collected data. A table provides information on each indicator displaying its corresponding criterion, the name of the indicator, the verifiers used to collect data on that indicator and the norm that was set for the indicator. The distinction between basic and core indicators is indicated. The norm will not be explained in further detail if the contents of the table are self-explanatory. The norm including its number of points which is marked in bold writing is the one awarded to the respective indicator.

At the end of each dimension there is a final calculation that includes all points and each respective quantifier. This will allow the labelling of each dimension with a respective colour (red, yellow or green) according to the level of sustainability that has been achieved. In the last subchapter, the calculations and findings are classified using the method explained in chapter 4.4.

5.1 Management dimension

The management dimension is the first part of the criteria catalogue because it acts as a basis for other dimensions. This dimension is aimed at securing the existence of sustainable governance mechanisms, legal prerequisites and organisational framework that enable sustainable development to take place. On one hand this dimension focuses on strategic management plans that provide necessary requirements for sustainable tourism development. On the other hand, the dimension focuses on operative management, enabling active measures such as stakeholder incorporation or the implementation of programmes and strategic plans. The management dimension is really complex, comprising the highest number of criteria, which are the following:

- Criterion A1: Sustainable Destination Strategy
- Criterion A2: Destination management organization
- Criterion A3: Monitoring
- Criterion A4: Safety and security
- Criterion A5: Accessibility
- Criterion A6: Property Acquisition
- Criterion A7: Promotion
- Criterion A8: Sustainability certification

Criterion A1: Sustainable Destination Strategy:

In order to ensure long-term sustainable tourism activity in a destination, a multi-year strategy on local or regional level is imperative. The strategy acts as a conceptual framework and comprises strategic objectives, product development efforts and marketing and promotion concepts. The strategy should also consider economic, social and environmental impacts of tourism in the destination. This criterion consists of two indicators which discuss the mere existence of a strategy, its availability and its currency.

Indicator A1.1 Multi-year destination strategy that includes a focus on sustainability and sustainable tourism

The first indicator of this criterion verifies the existence of a destination strategy, that considers multiple years and clearly focuses on sustainability.

Criterion A1: Sustainable destination strategy		
Indicator A1.1 Multi-year destination strategy that includes a focus on sustainability and sustainable tourism		
Verifier	Norm	
Secondary Research		Core indicator
	0 P.	Non-existence of strategy
	1 P.	Existence of strategy but either not multi-year or no emphasis on sustainable tourism
	2 P.	Existence of a multi-year strategy comprising all dimensions of sustainable tourism

This indicator is considered a core indicator due to its relevance for long-term sustainable development and its role as a framework for involved stakeholders. The points are awarded as per the table above. The City of Windhoek is currently working on a new "Targeted Windhoek Tourism Development Strategy". The procurement process was finalized in 2018 and the successful bidder, PricewaterhouseCoopers, signed the letter of acceptance with the city (City of Windhoek 2018). The concept which is not openly published yet will be enriched by the findings of this study. Apart from the tourism strategy the City of Windhoek has published a "Transformational Strategic Plan (2017-2022)", which is not directly aimed at tourism but comprises important topics for the city such as transportation, safety and security, risk management, renewable energy and water supply. On a national level the Ministry of Environment and Tourism has published papers called "National Tourism Investment Profile & Promotion Strategy 2016-2026" and "National sustainable tourism growth and investment promotion strategy 2016-2026". These papers cover objectives, growth targets, monitoring and evaluation systems and tourism investment. Targets for the City of Windhoek, however, are not mentioned specifically. Since this study evaluates the status quo of the situation in Windhoek 0 points are awarded for this indicator. For the past years a strategy exclusively focused on tourism did not exist.

Indicator A1.2 Up-to-date and publicly available multi-year destination plan or strategy

Besides its mere existence the destination strategy should be publicly available so that stakeholders can familiarize themselves with its contents. Moreover, only a paper which is up-to-date can act as a framework indicating the scope of projects and their due date. The last tourism strategy was directed towards the period 2003-2006.

Criterion A1: Sustainable destination strategy	
Indicator A1.2 Up-to-date and publicly available multi-year destination plan or strategy	
Verifier	Norm
Secondary Research	Basic indicator
	0 P. The strategy is neither up to date nor publicly available
	1 P. The strategy is either not up-to-date or is not publicly available
	2 P. The strategy is up-to-date and publicly available

This indicator is a basic indicator, since the focus about the strategy lies on its existence. Depending on the combination of availability and currency of the strategy, 0-2 points are awarded as per the table above. The two mentioned national strategies are up-to-date and publicly available. The Targeted Windhoek Tourism Development Strategy is not yet published. This is why 0 points are awarded.

Criterion A2: Destination Management Organization

This criterion focuses on the existence of a destination management organization (DMO). A DMO is the "organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision. [Key activities are] coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and convention bureau activities" (UNWTO 2016).

Indicator A2.1 An organization (DMO) has responsibility for a coordinated approach to the management of sustainable tourism

The first indicator of this criterion verifies the existence of a DMO and its approach towards sustainability.

Criterion A2: Destination management organization
Indicator A2.1 An organization (DMO) has responsibility for a coordinated approach to the management of sustainable tourism

Verifier		Norm	
Secondary Research	Interview Grace Pujatura		Core indicator
		0 P.	Non-existence of a DMO or other tourism institution with sustainability approach
		1 P.	Existence of a DMO that treats the topic of sustainable tourism with no emphasis
		2 P.	Existence of a DMO responsible for the management of sustainable tourism

This is a core indicator since the DMO acts as a central entity that manages all the elements a destination is made up of, ideally ensuring a coordinated and sustainable approach to tourism. The norm is based on the GSTC recommendations. The department of economic development identifies a branch that is responsible for tourism in Windhoek. They say "The primary purpose of the Tourism Section is to transform the tourism sector and facilitate growth through sustainable and responsible development and promotional interventions" (City of Windhoek Department Portal 2019). Grace Pujatura states that "tourism is a section under the division of economic development" (cf.1.7). The tourism website cannot be accessed so it is unclear what type of content stakeholders can receive from there. Furthermore, there is a marketing and events management section. Their core areas are cooperate marketing, logistics and event management (City of Windhoek Department Portal n.y.b). Based on the findings 1 point is awarded for this indicator, since an organization has the responsibility for a coordinated approach of tourism management, however, lacking a sustainability emphasis.

Indicator A2.2 Identification and integration of relevant stakeholder groups by the DMO

Tourism is a multi-sector discipline. Hospitality, tour operators, food services, cultural attractions and transportation are stakeholders that need to be considered. This is why the following indicator is aimed at stakeholder communications on part of the DMO.

Criterion A2: Destination management organization			
Indicator A2.2 Identification and integration of relevant stakeholder groups by the DMO			
Verifier		Norm	
Interview Hazel Milne	Interview Grace Pujatura		Basic indicator
		0 P.	The DMO does not consult with socially and economically relevant stakeholders
		1 P.	The DMO only consults with some socially and economically relevant stakeholders marginally
		2 P.	The DMO consults with socially and economically relevant stakeholders in regular dialogue

The norm for this indicator is based on industry best practices such as tourism round-tables or regular tourism forums. Grace Pujatura states that a tourism forum is a planned but that most communication currently takes place on a bilateral level (cf. I.10f). Hazel Milne states that meetings arise due to particular occasions such as the water crisis but not with regularity (cf. I.5f). This is why 1 point is awarded for this indicator. Stakeholders know each other and communicate through specific forums or association but not in regular dialogue.

Indicator A2.3 Assigned responsibility for sustainable tourism within the tourism organization

This indicator deals with enabling an individual with sufficient competences and time resources to take a lead in sustainable tourism development.

Criterion A2: Destination management organization	
Indicator A2.3 Assigned responsibility for sustainable tourism within the tourism organization	
Verifier	Norm
Interview Grace Pujatura	Basic indicator
	0 P. No staff member is responsible for sustainable tourism
	1 P. The issue of sustainable tourism is dealt with subordinately among various team members
	2 P. A staff member is responsible for sustainable tourism. The employee has sufficient competence and time resources

The norm of this indicator identifies the individual task, time resources and competences of potential team members in the DMO. Grace Pujatura states that the task is dealt with among different team members. However, since sustainable tourism is a topic that is "just coming up" no groundwork on its organization has been laid (cf. I.18f). Based on this statement 1 point is awarded for this indicator.

Criterion A3: Monitoring

The following criterion focuses on the existence of a monitoring system. In order to track trends and patterns in tourism, the development of an ongoing data collection over multiple years is essential.

Indicator A3.1 Active collection of data and public reporting of environmental, economic, social, cultural and tourism management issues

The purpose of this indicator is to verify whether the destination reviews any information and data available in the destination in a particular turn. This can be an analysis of the

environmental factors during the preparation of a strategy paper, a SWOT analysis or an inventory of existing tourism products, infrastructure, socio-economy and natural resources. Proving the importance and value of tourism is difficult without having any numerical evidence. This is why data collection is indispensable in order to receive support from political level.

Criterion A3: Monitoring			
Indicator A3.1 Active collection of data and public reporting of environmental, economic, social, cultural and tourism management issues			
Verifier		Norm	
Secondary Research	Interview Grace Pujatura		Core indicator
		0 P.	Non-existence of active monitoring and public reporting
		1 P.	Existence of active monitoring, however, without publication or not containing all aspects
		2 P.	Existence of active monitoring and public reporting

A concept for sustainable tourism can only be formulated if data on the environmental, economic, social and cultural impact of touristic activities is available. This is why this indicator is deemed a core indicator. The points are awarded as per the table above. "All aspects" refers to the environmental, economic, social and cultural dimension. Grace Pujatura states that no tourism-specific monitoring takes place (cf. l.27f). The "Windhoek Mayoral Report" contains information on environmental, economic, social, cultural and tourism management issues. Moreover, the "Annual Council Performance Report 2017/2018" indicates environmental and economic developments (City of Windhoek 2018). Nevertheless, based on these finding 0 points are awarded for this indicator. Although, environmental and economic monitoring takes place, the data is not tourism-specific. Neither a SWOT analysis nor an up-to-date inventory of tourism products is available. In addition to that, economic data about tourism contributions and employment data is unavailable.

Indicator A3.2 Periodical review of the monitoring system

This indicator evaluates the currency of the data collection process.

Criterion A3: Monitoring		
Indicator A3.2 Periodical review of the monitoring system		
Verifier		Norm
Secondary Research	Interview Grace Pujatura	Basic indicator
		0 P. The monitoring system is not reviewed periodically
		1 P. The monitoring system is reviewed every 5-10 years
		2 P. The monitoring system is reviewed less than every 5 years

The norm for this indicator is divided as per the table above and based on a realistic monitoring system, since collecting data on all aspects of tourism is very time consuming. The last published version of the Mayoral Report dates back to 2016. Linked to the findings of indicator A3.1 and the statements from Grace Pujatura no continuity of data monitoring can be assumed. Hence, this indicator is insufficiently fulfilled resulting in a rating of 0 points.

Criterion A4: Safety and security

The following criterion focuses on safety and security measures. The image of a destination is highly influence by the perception of security in that destination, which has a direct influence on first-time visits and return visits. This criterion consists of four indicators.

Indicator A4.1 Crisis and emergency response plans that consider attraction sites and urban spaces relevant for tourism are existent and publicly available

This indicator considers the existence of an emergency response plan for the destination.

Criterion A4: Safety and security		
Indicator A4.1 Crisis and emergency response plans that consider attraction sites and urban spaces relevant for tourism are existent and publicly available		
Verifier		Norm
Secondary Research	Interview Grace Pujatura	Core indicator
		0 P. Response plans are neither existent nor publicly available
		1 P. Response plans are existent, however, not publicly available
		2 P. Response plans are existent and publicly available

This indicator is a core indicator since safety and security are a prominent topic for travel to African countries. Only a destination which identifies the problems and assigns respective measures can effectively tackle the problem of crime in the long run.

The Department Portal of the City of Windhoek comprises an emergency management division. Their operations sections is set out "for protecting the lives and property of residents" (City of Windhoek Department Portal n.y.). Tourism is not mentioned specifically. In 2011 the Office of the Prime Minister published a National Disaster Risk Management Plan. It does not consider tourism in particular but covers identifying risks, early warning mechanisms, and channels for communicating warnings. Moreover, the Windhoek City Police Service confirms that data on crime and road safety statistics is "collected daily, analyzed and discussed weekly [...] on zonal basis" (City of Windhoek 2016, p. 32). Mary-Ann Kahitu and Olavi Makuti refer to a cooperate risk register (cf. I.27f.). The interview with Grace Pujatura reveals that individual buildings relevant to tourism have an emergency response plan but that the city as such does not (cf. I.43f). Observation in the City Museum shows that there is an emergency call unit. Despite the existence of these plans, the efforts seem to focus on residents and physical threats rather than security issues. A crisis and emergency response plan that consider attraction sites and urban spaces relevant for tourism is not existent. This is why 0 points are awarded for this indicator.

Indicator A4.2 Taxi licensing system with clear pricing and an organized taxi dispatch system at points of visitor entry

The fact that public transportation is merely existent in Windhoek forces tourists to rely on private car companies or taxis. Since fraud attempts and trickery between taxi drivers and tourists occur repeatedly, this indicator requires special attention.

Criterion A4: Safety and security			
Indicator A4.2 Taxi licensing system with clear pricing and an organized taxi dispatch system at points of visitor entry			
Verifier		Norm	
Interview Issaskar Kiakaere	Interview Clarence Rupingena	0 P.	Basic indicator The taxi licensing system is unclear and unorganized not following uniform standards
Observation Points of Visitor Entry	Observation Trans- portation	1 P.	There is a uniform standard, however pricing and dispatching are unclear and do not function accordingly
		2 P.	The taxi licensing system is clear and organized at all POIs/ points of visitor entry

The norm is based on the GSTC and points are awarded as per the table above. Clarence Rupingena clarifies that, "the [taxi] licensing is not done on a city level or a regional level

but on a national level. [The city does] not have that authority - the authority lies with the government" (cf.I.9f.). Despite a general Windhoek pricing fare "everybody is charging what they want [...] especially with women and tourists" (cf.I.25,27). Moreover, one has to distinguish between taxis "which are operating in the urban area" and "taxis that can move out of the urban area and go to the airport" (cf.I.16f). Issaskar Kiakaere warns that "taxis are often fake. One should not stop them from the street but rather use a shuttle or use the service 'dial a cab'". The observation at points of visitor entry reveals that the dispatch system and the pricing are unclear. The observation in the city also shows that the dispatch system is unclear since taxi drivers follow certain routes which are unknown to tourists and therefore often result in a rejection of passengers. This is why 0 points are awarded for this indicator. Every taxi has a number and a fare regulation they must abide by. However, taxi numbers are often faked, routes are barely comprehensible for visitors and passengers are often overcharged.

Indicator A4.3 Perception of safety by tourists

Safety is a basic human need whose perception is enhanced in unknown or foreign surroundings. This is why creating a safe environment for tourists is part of creating satisfied visitor that are willing to return to the destination.

Criterion A4: Safety and security		
Indicator A4.3 Perception of safety by tourists		
Verifier	Norm	
Visitor Survey		Basic indicator
	0 P.	Scale 1-5 (5 being the best), Average of all answers $x \leq 3.0$
	1 P.	Scale 1-5 (5 being the best), Average of all answers $3.0 < x < 4.0$
	2 P.	Scale 1-5 (5 being the best), Average of all answers $x \geq 4.0$

The perception of safety by tourists is determined with the help of short questionnaire-based interviews. A scale of 1-5 was chosen as a norm and divided as per the table above. 125 tourists answered the question resulting in an average of 3,98. This is why 1 point is awarded for this indicator. It has to be noted that some tourists make a clear distinction between their perception of safety in the central business district and in Katutura.

Indicator A4.4 Safety precautions taken by the city government

The following indicator evaluates the actions taken by the city government to increase safety in tourism-relevant areas.

Criterion A4: Safety and security			
Indicator A4.4 Safety precautions taken by the city government (Security presence at POIs, Police patrols CCTV cameras, Public street lighting)			
Verifier		Norm	
Observation City Museum	Observation Tourist attractions	0 P.	Basic indicator Non-existence of mentioned safety precautions
Interview Grace Pujatura	Observation Points of Visitor Entry	1 P.	Existence and clearly visible implementation of 1-2 aspects
		2 P.	Existence and clearly visible implementation of 3-4 aspects

The observation in the City Museum reveals that Windhoek is divided into 19 zones. Four officers are patrolling in each zone at all times to ensure safety and security. Grace Pujatura confirms that the police patrols at touristic hotspots and ATMs for visibility. Moreover, the city has installed billboards to caution tourists to be careful. CCTV is installed in most public areas in the CBD. In addition to that, the city produces a 'Crime against tourism' leaflet on an annual basis. The newest addition are city police officers on bicycles in Independence Avenue. Figure 10 shows a safety note in central Windhoek.

The observation at tourist attraction showed that 9 out of 15 attractions had a security guard, 4 out of 15 were regularly patrolled by police officers, 9 out of 15 had CCTV which was mostly self-installed and 2 out of 15 had street lighting. Concerning the latter one, it has to mention that people usually do not leave their house after sunset so security at night is not of utmost importance. Concerning the points of visitor entry, the airport and train station had security staff and CCTV in place. The indicator is awarded with 2 points, since security officers, police patrol and CCTV are existent and clearly visible at the vast majority of POIs.



Figure 10 Safety note by city police in central Windhoek Source: Own photograph

Criterion A4: Accessibility

The aim of this indicator is to define the framework conditions for travel by people such as seniors or people with disabilities. The United Nations Convention on the Rights of Persons with Disabilities aims towards the self-determined and equal participation of people with disabilities and at the same time calls for the implementation of these goals in tourism. This is why two indicators are part of this criterion in the management dimension and another two will follow in the social-cultural dimension.

Indicator A5.1 Policies supporting access to tourist sites and facilities for individuals with disabilities and others who have specific access requirements

The first indicator verifies the existence of a policy on accessibility that sets the groundwork for tourism operations in this field.

Criterion A5: Accessibility		Indicator A5.1 Policies supporting access to tourist sites and facilities for individuals with disabilities and others who have specific access requirements	
Verifier		Norm	
Secondary Research	Interview Clarence Rupingena	0 P.	Basic indicator Non-existence of an "access for all" policy
		1 P.	Existence of an overview, however no support or specification
	Interview Grace Pujatura	2 P.	Existence of an "access for all" policy with specification on tourist attractions and their accessibility

The norm for this indicator is based on the GSTC and best practices in accessible tourism. The "Annual City Council Performance Report" identifies the following as a key performance areas: "Provision of subsidised transport to senior citizens and people with disabilities" (City of Windhoek 2018, p. 83). Clarence Rupingena also emphasizes: "The issues of universal access is being looked at but there is no stand-alone policy on it. We need to push for a stand-alone policy on that one" (cf.1.69f). Grace Pujatura confirms that there is no stand-alone policy on this topic (cf.1.59). This why 0 points are awarded for this indicator.

Indicator A5.2 Topic of accessibility in communication material from the DMO including marking of facilities and services

The first indicator verifies the existence of a policy on accessibility that sets the groundwork for tourism operations in this field.

Criterion A5: Accessibility	
Indicator A5.2 Topic of accessibility in communication material from the DMO including marking of facilities and services	
Verifier	Norm
Secondary Research Observation Tourist Information	Basic indicator
	0 P. No mentioning of the topic in any means of communication from the DMO
	1 P. The topic of accessibility is listed in specific means of communication from the DMO
	2 P. The topic of accessibility is listed in all means of communication from the DMO. Facilities and services are marked accordingly

The norm for this indicator is based on the GSTC, best practices in tourism information centers and the design of information material and brochures. The points are awarded as per the table above. Means of communication refers to brochures, maps, the accommodation directory and the destination website.

Due to the fact that the official tourism website is not working the website my.na was checked for restaurants, accommodation and tours. Specific information for disabled access could not be found. The observation conducted in the tourism information shows that no means of communication mentioning the topic of accessibility were found. This is why 0 points are awarded for this indicator.

Criterion A6: Property acquisition

Since the unlawful expropriation of land runs through Namibian history, this criterion requires close attention. Laws and regulations regarding property acquisition can prevent historically rooted power relationships from distorting social structures any further (see chapter 2.1).

Indicator A6.1 Policy or legislation that considers indigenous rights, ensures public consultation and authorizes resettlement only when there is informed consent and/ or reasonable compensation

The only indicator in this criterion focuses on legal framework about property acquisition as well as verifying its operational implementation as part of the norm.

Criterion A6: Property acquisition	
Indicator A6.1 Policy or legislation that considers indigenous rights, ensures public consultation and authorizes resettlement only when there is informed consent and/ or reasonable compensation	
Verifier	Norm
Secondary Research	Core indicator
	0 P. Non-existence of a policy or legislation
	1 P. Existence of policy or legislation
	2 P. Existence of policy or legislation with clearly recognizable operational implementation in urban spaces

This indicator is a core indicator, as land reform is a particularly important issue in Namibia. The norm is closely based on the GSTC recommendation for this indicator. The first aspect that need to be verified is the existence of a legislation. Article 16 of the Constitution of the Republic of Namibia "includes the freedom and protection of property:

- *All persons shall have the right [...] to acquire, own and dispose of all forms of immovable and movable property [...] and to bequeath their property to their heirs or legatees [...]*
- *The State or a competent body or organ authorised by law may expropriate property in the public interest subject to the payment of just compensation, in accordance with requirements and procedures to be determined by Act of Parliament*" (Melber 2018).

This article covers the topic of acquiring immovable property as well as receiving a "just compensation" should one be expropriated. The second aspect that needs to be verified is the operational implementation in urban spaces. A newspaper article published in 2018 states the following: „Public debate on the land reform narrative is more concentrated on farming and rural lands. We are not witnessing any public debate around urban land reform. We are not hearing voices calling for expropriation (without compensation) of urban land. We are not hearing voices of concern about redistribution of urban land in the capital and other urban centres in the country" (The Southern Times 2018). Based on this data 2 points will be awarded for this indicator. Laws on property acquisition and expropriation form part of the constitution and appear to cause no problems in Windhoek. It is to be noted that the author does not claim unrestricted validity of the assessment based on these two sources.

Criterion A7: Promotion

Promotion refers to "the entire set of activities, which communicate the product, brand or service to the user" (The Economic Times 2019). Promotion is a big part of a DMOs daily tasks which is underlined by the fact that a DMO is often also referred to as a Destination Marketing Organization. The goal should be to raise awareness about the destination, to

show the privileges of the destination and to sell activities, tickets and products. The indicator in this criterion will focus on the communication materials issued by the DMO.

Indicator A7.1 DMO marketing for sustainable products and businesses

This indicator examines if sustainable product components of tourism services and sustainable offers are emphasised by the DMO and advertised accordingly. Sustainable could mean local or regional products, fair-trade products, activities contributing to the support of social or environmental projects or activities aimed at the education of tourists.

Criterion A7: Promotion			
Indicator A7.1 DMO marketing for sustainable products and businesses			
Verifier		Norm	
Secondary Research	Observation Tourist Information		Basic indicator
		0 P.	Sustainable products and businesses are not marketed by the DMO
		1 P.	Sustainable products and businesses are advertised without emphasis by the DMO
		2 P.	Sustainable products and businesses are clearly emphasized by the DMO and advertised accordingly

The points for this norm are awarded as per the table above and are based on existing criteria catalogues for destinations. The tourism portal website does not list own businesses or products but refers to my.na. On their website one can find a list of tourism enterprises none of which indicate a special labelling for sustainability. The observation in the tourist information confirms that 8 out of 140 brochures and leaflets mention sustainable aspects. It needs to be noted that the 140 items are promotion material for all of Namibia and not only for Windhoek. The 8 items advertise traditional cuisine using local products, locally made art and handicrafts, fair trade products supporting "sustainable livelihoods of marginalized communities", locally grown and crafted products and e-bike tours. 0 point are awarded for this indicator, as no emphasized promotion can be observed and since the sustainability efforts originate from the businesses themselves.

Indicator A7.2 Existence of a uniform cooperate design and slogan for all means of communication distributed by the DMO

The design of the communication materials must ensure that the descriptions are precise, that the target groups are clearly addressed and that the design is uniform. The advertising message should respectfully present the destination as well as the locals and reflect an authentic picture of the destination (German Tourism Association 2017). A strong brand recognition can thus be enhanced by a uniform cooperate design and a destination slogan.

Criterion A7: Promotion	
Indicator A7.2 Existence of a uniform cooperate design and slogan for all means of communication distributed by the DMO	
Verifier	Norm
Secondary Research	Basic indicator
Observation Tourist Information	0 P. Non-existence of a cooperate design and a slogan for the destination
	1 P. Existence of a cooperate design and a slogan for the destination, however, varied use among means of communication
	2 P. Existence of a cooperate design and a slogan for the destination and uniform use in means of communication

The norm for this indicator is based on the recommendations for touristic communication materials. The City of Windhoek uses a tree as central element in the city logo. Their old slogan "City of Many Faces" was changed to "The Gateway to Endless Opportunities". Due to the fact that promotional materials cannot be accessed on the tourism portal website an assessment is impossible. The observation in the tourist information shows varied logos and both slogans on different types of promotional items. Besides the tree symbol a rising sun behind a skyline is used accompanied by the old slogan. Figure 11 displays the variety in the use of the colours, the logo, the slogan and the vision.

The varied use of designs and slogans results in a rating of 0 points for this indicator.



Figure 11: Promotional materials from the tourist information office (Source: Own photograph).

Criterion A8: Sustainability certification

A sustainability certification is considered an important marketing instrument because it can add transparency and help travelers to gain a better orientation (Tourism2030 2019a). Moreover, the certification can act as an inward management tool since businesses are obliged to take a close look into all their operations during the process of certification. In the case of a destination, the DMO has to elaborate which certificates are available in their country, which labels comply with their expectation on the sustainability coverage, which credibility level the certification provides and what kind of visibility the label has on a global scale (Tourism2030 2019b).

Indicator A8.1 Industry-supported sustainable tourism certification for Namibia

The following indicator focuses on a tourism certification for enterprises in Namibia.

Criterion A8: Sustainability certification	
Indicator A8.1 Industry-supported sustainable tourism certification for Namibia	
Verifier	Norm
Secondary Research Interview Hazel Milne	Basic indicator
	0 P. Non-existence of a sustainable tourism certification
	1 P. Existence of a sustainable tourism certification
	2 P. Existence of a GSTC recognized sustainable tourism certification

The norm for this indicator is based on the GSTC catalogue for destinations. The points are awarded as per the table above. The term "GSTC recognized" needs to be distinguished from the label "GSTC accredited". The first one meaning that "at least one standard of the certification programme is recognised by the GSTC" while the latter means that there was "a 3rd party audit complying with the GSTC requirements" (Tourism2030 2019b).

In Namibia 'Eco Awards Namibia' is the alliance of private sector and government organisation that is responsible for a sustainable tourism certification programme. The criteria used by similar practices was amended to suit the Namibian environment (Eco Awards Namibia n.y.a). Eco Awards Namibia forms part of the African Alliance for Sustainable Tourism (cf. Hazel Milne 198). Due to the lack of GSTC recognition 1 point is deducted from this indicator resulting in a final rating of 1 point.

Indicator A8.2 Publicly available list of sustainably certified enterprises

The GSTC criteria name the availability of a public list displaying certified enterprises in the destination as an indicator. The following indicator will examine this requirement.

Criterion A8: Sustainability certification	
Indicator A8.2 Publicly available list of sustainably certified enterprises	
Verifier	Norm
Secondary Research	Basic indicator
	0 P. List is unpublished
	1 P. List is published but does not provide further information
	2 P. List is published, easy to find and provides additional information on the certified businesses

Certified sustainable tourism businesses are listed on the Eco Awards website. A filter allows the user to choose the type of company and number of flowers awarded, indicating the degree of compliance with the catalogue. Each enterprise has its own article providing further information, useful links, pictures and a location on a map (Eco Awards Namibia n.y.b). It has to be noted that this indicator does not address the number of certified businesses and thus the share in the total market volume. 67 accommodation establishments and 5 tour operators are certified throughout Namibia. In Windhoek 4 accommodations and 4 tour operators are certified (October 2019).

The map in figure 12 shows that the distribution of certified companies in tourism-relevant areas is very even. Guests have the option to spend the night in a certified accommodation both in the capital and outside the cities, if they value this attribute. In the long run, a higher number of certified companies should be aimed at, but the researcher considers it a wrong signal to deduct points from the initiative at the present time due to insufficient market penetration.

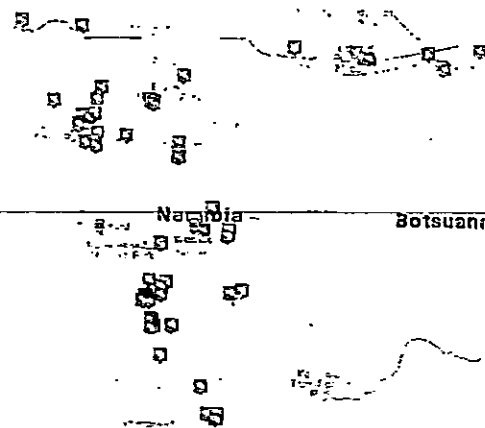


Figure 12 Location of certified tourism businesses in Namibia (Source: Eco Awards Namibia n.y.b)

Evaluation: Management Dimension:

After analyzing the 8 criteria from the management dimension the results of the 18 indicators, 5 of them being core indicators, are displayed in the table 5 below.

The evaluation shows that the City of Windhoek does not focus on managerial issues to the extent they should be. The fact that 10 out of 18 indicators were rated with 0 points is alarming. Especially the efforts concerning monitoring turned out to be very poor. The accessibility criteria were also rated with a total of 0 points. Concerning safety precautions by the government and general safety in the city centre the results were pleasing. Furthermore, sustainability certification efforts proved to be handled in a good manner. The total of 30% puts the management dimension into the red bracket. Figure 13 illustrates that this dimension is within the red bracket, however, rather tends towards the very upper end of the red dimension.

Item	Actual Score	Weighted Score	Weighted Score
A1.1	0	2x	0
A1.2	0	1x	0
A2.1	1	2x	2
A2.2	1	1x	1
A2.3	1	1x	1
A3.1	0	2x	0
A3.2	0	1x	0
A4.1	0	2x	0
A4.2	0	1x	0
A4.3	1	1x	1
A4.4	2	1x	2
A5.1	0	1x	0
A5.2	0	1x	0
A6.1	2	2x	4
A7.1	0	1x	0
A7.2	0	1x	0
A8.1	1	1x	1
A8.2	2	1x	2
Sum = 23		Sum = 14	
		$\frac{14}{(23 \times 2)} = 0.30$	

Table 5 Results management dimension (Source: Own design)

Degree of fulfilment management dimension

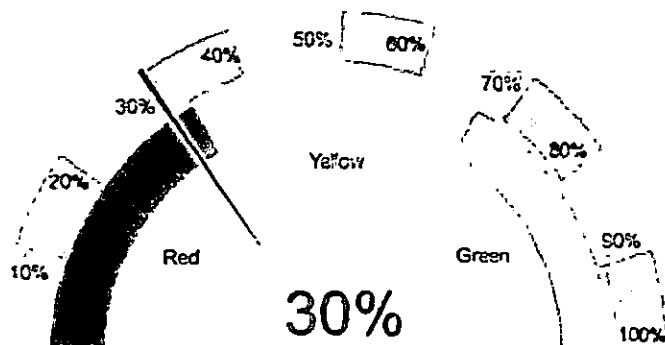


Figure 3 Degree of fulfilment management dimension (Source: Own design and model)

5.2 Economic dimension

The following chapter focuses on the economic dimension within the model of sustainable development. The focus lies on the minimization of negative impacts and the maximisation of positive effects of tourism regarding its economic contribution. The economic dimension has an elevated importance, because without economic stability environmental or social topics might not be considered by business owners because they lack the financial resources. This is why profitable businesses, that generate income for the region and employment for the community have to be established. Tourism has the potential to make direct and indirect contributions to upstream and downstream economies and thus also contributing to regional development. Especially employment and skills development for staff members in tourism is important to empower potential new business owners that can then contribute to poverty alleviation in the region.

On the other hand, a community should not be highly dependent on tourism but keep investments in other sectors flowing. This over-dependence might be exacerbated by leakages, inflation or a rise in the cost of living for locals. Windhoek, being the economic and financial centre of the country, plays a particularly important role. Most businesses base their headquarters in Windhoek and operate tourism activities throughout the country from there. The fact that many visitors pass through Windhoek during their trip represents a great opportunity for local businesses to catalyse the touristic activity into revenue and employment.

The economic dimension comprises the following six criteria, which consider the aspects mentioned above.

- Criterion B1: Economic monitoring
- Criterion B2: Local career opportunities
- Criterion B3: Tourism employment
- Criterion B4: Equality
- Criterion B5: Tourism awareness and education
- Criterion B6: Support of local entrepreneurs and fair trade

Criterion B1: Economic monitoring

In order to ensure long-term sustainable tourism activity in a destination, the numeric growth needs to be closely monitored. Moreover, data on economic contributions from tourism can help to push tourism interests and investments by conveying them to administrative officials. Lastly, data on occupancy rates, seasonality and expenditure can help to optimize tourism planning and to predict trends.

Indicator B1.1 Monitoring and reporting of touristic key figures

The first indicator of this criterion verifies the existence of a monitoring system for touristic key figures.

Criterion B1: Economic monitoring			
Indicator B1.1 Monitoring and reporting of touristic key figures (arrivals, overnights, monthly distribution of arrivals and overnights, expenditure data, bed occupancy rate, revenue and employment)			
Verifier		Norm	
Secondary Research	Interview Grace Pujatura		Core indicator
		0 P.	Monitoring and reporting of 0-2 aspects
		1 P.	Monitoring and reporting of 3-4 aspects
		2 P.	Monitoring and reporting of 5-7 aspects

This indicator is considered a core indicator because only by monitoring data, the value of tourism can be determined and used to enhance its significance. The points are awarded as per the table above, taking into account the aspects listed at the top of the table. Finding data on tourism in Windhoek is highly difficult. The "Report on the Namibia Tourist Exit Survey" contains information on the most popular places visited in Namibia - Windhoek being Number 1 (MET 2013, p. 5). The "Namibia Tourism Satellite Account" and the "Tourist Arrival Statistics Report" do not contain data on Windhoek (MET 2013). On city level the "Annual Council Performance Report" states that the City of Windhoek will focus on the implementation of the "Windhoek Economic Index" which will enable the collection and analysis of key economic data and trends to inform decision-making and policy making in the financial year 2018/2019 (City of Windhoek 2018, p. 90). Grace Pujatura also identifies the collection of data as "a huge challenge" (cf. l.70). She states that the city mostly relies on national statistics which look at Windhoek as a region rather than as a city. Associations capture their own statistics which only include their members and do not necessarily reflect the entire market. This is why 0 points will be awarded for this indicator.

Indicator B1.2 Regular monitoring and reporting of direct and indirect contributions of tourism

This indicator verifies the existence of a monitoring system for tourism contributions.

Criterion B1: Economic monitoring
Indicator B1.2 Regular monitoring and reporting of direct and indirect contributions of tourism

Verifier	Norm
Secondary Research	Basic indicator
	0 P. Monitoring and reporting of data every 5 years or more
	1 P. Monitoring and reporting of data every 3-5 years
	2 P. Regular monitoring and reporting of data every 1-2 years

The norm for this indicator has been based on the GSTC. A visitor survey does not necessarily need to be conducted yearly since it is very resource-consuming. Data on arrivals, overnights and revenue however, ideally needs to be collected in close cycles to allow for the derivation of patterns and the allocation of funds. As the findings from indicator B1.1 prove, no regular data monitoring is carried out. This is why 0 points are awarded.

Criterion B2: Local career opportunities

One of the most important premises for individual progress is education and employment. Creating well educated employees will improve the service quality and revenue of a business and allow the employees to ascent to higher positions and reach the standard of living they desire.

Indicator B2.1 Legislation or policies supporting equal opportunities in employment for all

Since the objective of governments should be to secure prosperity and dignity for all inhabitants, the following indicator focuses on legal employment equality framework.

Criterion B2: Local career opportunities	
Indicator B2.1 Legislation or policies supporting equal opportunities in employment for all (including women, youth, disabled and minorities)	
Verifier	Norm
Secondary Research	Basic indicator
	0 P. Non-existence of legislation or policy
	1 P. Existence of legislation or policy
	2 P. Existence and clearly recognizable operational implementation

The norm for this indicator is based on GSTC recommendations. The clearly recognizable operational implementation will be confirmed by using data from secondary sources. Namibia's independence led to the enactment of many new labour laws. They were aimed at protecting disadvantaged Namibians from exploitation (Christie et.al. 2014, p. 78). Unfair acts of discrimination or harassment from an employer are addressed under the term "Affirmative Action". The Labour Act No. 6 of 1992 states that "nothing contained [in any

other part of the Act] shall be construed as prohibiting any employer or person from implementing any employment policies and practices aimed at advancement of persons who have been disadvantaged in the labour field by discriminatory laws or practices which have been enacted or practised before independence of Namibia" (Kamwi 2005, p. 4–5). The City of Windhoek itself claims to be an "equal opportunity employer which ensures equality of employment opportunities for all Namibians regardless of race, colour, gender, national origin, sex, age, ethnicity and mental or physical disability" (City of Windhoek 2018, p. 108). An Employment Equity commission regularly tests businesses in the private sector regarding their employee structure. Their annual report states that 79 businesses in the tourism and hospitality sector were tested. Among them 24 based in Windhoek (Employment Equity Commission 2018, p. 160–162).

Furthermore, a new policy was introduced under the abbreviation NEEEF (New Equitable Economic Empowerment Framework) which includes "removing barriers of socio-economic advancement in order to enable previously disadvantaged persons to access productive assets and opportunities of empowerment" (Office of the Prime Minister 2015). Critics claim that "Neeef [...] will be useless if it merely perpetuates the elite taking advantage of government resources in the name of 'previously disadvantaged'. After all, many white businesses have long figured out how to please the few well-connected blacks with meaningless management positions and lucrative board fees or shareholding" (The Namibian 2019). Table 6 further illustrates this statement. It indicates that the operational implementation of this act is still not visible in every hierarchy level. Despite the fact that gender quotes are fairly even the share of racially disadvantages persons in lower management and unskilled work is remarkably high. 88% of executive directors and 71% of senior management are racially advantaged or Non-Namibians. By contrast, only 5% of skilled, 1% of semi-skilled and less than 1% of unskilled jobs are taken by the racially advantaged or Non-Namibians. A mixture of racially advantaged and disadvantaged can be confirmed in middle management and supervisory level. Despite the fact that only 30% of businesses from this sample are based in Windhoek a clear operational implementation cannot be attested. Consequently 1 point is awarded for the indicator honoring for the existence of the policy.

Detailed results: Sustainability dimension, 656 case of Windhoek

Job Category	Racially disadvantaged		Racially advantaged		Persons with disabilities		Non-Namibian		Total		Grand Total
	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women	
Executive directors	6	4	33	20	9	9	10	7	49	31	80
Senior management	34	27	59	63	1	0	18	13	112	103	215
Middle management	123	131	60	87	0	1	19	16	202	235	437
Specialised/senior/skilled supervisory	269	296	25	30	4	3	9	6	307	335	642
Skilled	856	803	31	50	2	3	5	8	894	864	1758
Semi-skilled	1072	1220	4	21	7	1	0	0	1083	1242	2325
Unskilled	1105	1415	0	2	5	2	0	0	1110	1419	2529
Total	3465	3896	212	273	28	19	81	50	3757	4229	7986

Table 6 Tourism & Hospitality Sector Workforce Profile 2017/2018 (Source: Own table based on data from Employment Equity Commission 2018, p.122).

Indicator B2.2 Legislation or policies supporting a minimum wage for all

The implementation of a minimum wage encourages fair payment throughout a specific sector. Especially the tourism industry relies on staff from the low-skilled sector such as cleaning or maintenance staff, which is often underpaid. This is why the following indicator looks into the legal framework for adequate minimum payment.

Criterion B2: Local career opportunities			
Indicator B2.2 Legislation or policies supporting a minimum wage for all (including women, youth, disabled and minorities)			
Verifier		Norm	
Secondary Research	Interview Hazel Milne	Basic indicator	
		0 P.	Non-existence of legislation or policy
		1 P.	Existence of legislation or policy
		2 P.	Existence and clearly recognizable operational implementation

The norm is based on the GSTC recommendation for fair wages. The 'operational implementation' will be elaborated further at indicator B3.2. During the field research the author found that the issue of minimum wages in the tourism industry sparks quite some controversies and debate. Some experts are of the opinion that the minimum in tourism is based on the agricultural minimum wage of N\$1800 per month. Others argue that N\$3000 per month is necessary to make a reasonably decent living and that this is practiced in the

tourism industry. Hazel Milne states that negotiations about a minimum wage are still taking place and that there is a lot of uncertainty. She indicates that the payment in Windhoek underlies huge discrepancies depending on the size and level of sophistication of the accommodation establishment (cf.I.47f). Labor researcher Ntwala Mwilima says that "wages are determined primarily at the company level by management and through collective bargaining. As such, there are high disparities in the wages levels of workers in various industries, with the unskilled and unorganised workers getting disproportionately low wages" (Mwilima 2012, p. 11). Especially the wage levels of workers in the hotel industry are low. "Moreover, the reliance of the sector on international tourism makes it highly vulnerable to external economic conditions" (Mwilima 2012, p. 11). This variety of information causes the author to surmise that no legislation or policy for minimum wages in the tourism sector exists, which results in a rating of 0 points.

Indicator B2.3 Existence of a trade union for small and medium-sized tourism companies

This indicator evaluates if there is an organization representing the interest of staff members from the tourism sector against their more powerful employees. Having an interest groups helps to push for better working conditions in the industry.

Criterion B2: Local career opportunities			
Indicator B2.3 Existence of a trade union for small and medium-sized tourism companies			
Verifier			Norm
Secondary Research	Interview Hotels and Restaurants	Interview Hazel Milne	Basic indicator
			0 P. Non-existence of a trade union
	Interview Prosper Mageza	Interview Thomas Müller	1 P. Existence of individual interest groups in the tourism sector classified by type of enterprise
			2 P. Existence of a joint trade union for small and medium-sized tourism companies

When looking at the norm for this indicator a clear distinction must be made between employers' associations (hotels, tour operators, etc.) and trade unions representing employees. The secondary research indicates that there is a Namibia Food and Allied Workers Union (NAFAU) and the Tourism and Allied Workers Union of Namibia (TAWUN) (Mwilima 2012, p. 8). The interviews held with hotel and restaurant managers indicate that it is unclear which trade union the tourism industry belongs to. Hazel Milne states that there is a trade union and that Eco Awards Namibia verifies if staff members are free to join them without hesitation or prohibitions (cf.I.13f). Prosper Mageza claims that he is not aware of a tourism-exclusive trade union. He emphasizes that TASA also keeps the employees in mind when lobbying for tour operators and that the Tourist Guides' Association of Namibia does

the same (cf.I.4f). Thomas Müller refers to the associations such as TASA, TAN and HAN (cf.I.41f.). This indicator is rated with 1 point because there seem to be trade unions and interest groups, however, no trade union that focuses exclusively on tourism and MSMEs.

Indicator B2.4 Support of MSMEs

Besides the promotion of large tourism companies or international players the encouragement of local entrepreneurs to build up their own business is of high importance. Most of the time people willing to open a business lack the know-how and financial resources. This is why this indicator focuses on support for MSMEs.

Criterion B2: Local career opportunities				
Indicator B2.4 Support of MSMEs				
Verifier			Norm	
Secondary Research	Interview Hotels and Restaurants		Basic Indicator	
	Interview Grace Pujatura		0 P.	Non-existence of specific support programmes for MSMEs
	Interview Thomas Müller		1 P.	Support of MSMEs through either professional business management training or monetary resources
	Interview Liesl Liebenberg		2 P.	Support of MSMEs through professional business management training and monetary resources

The two main needs for MSMEs are training programmes and monetary help in the form of investment aids. This is why the norm is based on these two aspects. The threshold for a business to be registered for VAT is currently N\$500 000 which hinders small players from engaging into business (The Namibian 2019). The City of Windhoek announced that the development of a SMME Policy is in the process of being finalised in 2018//2019 (City of Windhoek 2018, p. 81). Located in Katutura is the Bokamoso SME incubation centre. It was established by the City of Windhoek to assist and to empower small businesses and to provide training towards sustainable business management. Hotel and restaurant owners state that there is no support from the city for small businesses. Grace Pujatura refers to the Emerging Tourism Enterprises Association that supports businesses with marketing and promotion (cf.I.80f). Thomas Müller also focuses on initiatives that are private sector driven and do not originate the DMO (cf.I.36). Liesl Liebenberg refers to an SME bank for monetary aid and to the Namibia Training Authority (NTA) for management training (cf.I.16f). The findings result in a rating of 1 point for this indicator. There are programmes and institution dedicated to the support of MSMEs. However, not everything is tourism-specific and driven by the DMO but rather based on private sector initiatives.

Criterion B3: Tourism employment

The following criterion will focus on working conditions in the tourism industry. On one side the fulfillment of legal restrictions will be verified, while on the other side fairness, the individual development of staff members and their satisfaction with their workplace will be examined.

Indicator B3.1 Staff in tourism enterprises receiving formal training and assessment

This indicator looks at the chances given to employees to improve their career opportunities. Enabling employees to gain skills in specific tasks and qualifying them for higher positions does not only serve the business but raises the level of education in the community.

Criterion B3: Tourism employment			
Indicator B3.1 Staff in tourism enterprises receiving formal training and assessment fulfilling the following criteria:			
<ul style="list-style-type: none"> - appropriate to the skill level of employees - documented - assessed and certified by recognized trainers 			
Verifier			Norm
Interview Hotels and Restaurants	Interview Tourist Attractions	Interview Prosper Mageza	Core indicator
			0 P. Majority of businesses does not offer formal training and assessment
			1 P. Majority of businesses does offer formal training and assessment fulfilling 0-1 aspects
Interview Thomas Müller	Resident Survey		2 P. Majority of businesses does offer formal training and assessment fulfilling 2-3 aspects

This indicator is considered a core indicator since many people lack proper school education, higher education and vocational training. Acquiring business know-how can be a real chance for staff members to raise their living conditions. The norm and aspects are based on recommendations by Eco Awards Namibia and the GSTC.

Out of the 11 hotels and restaurants that were tested, 11 claim to conduct trainings and assessments appropriate to the skill level of the employee, 10 claim that it is documented and 7 contract recognized trainers to carry out the assessment. The other businesses rely on inhouse training and cross-department training. 0 out of the 4 tourist attractions that were checked provide their staff with formal training. Some museums offer workshops with the Museum Association of Namibia. Prosper Mageza states that TASA is working on encouraging their members to "invest in training of their personnel" (cf.I.36). Furthermore, TASA promotes language courses for tour guides and works with the NTA to promote further training. He claims that "there is quite a number of initiatives and thoughts that have gone around training and empowering people" (cf.I.45f). Thomas Müller stresses the importance of on-the-job training since university graduates often still have a low level of

sophistication when entering into the sector (cf.I.71). Question 11 from the resident survey verifies if people working in tourism receive formal training. Out of the 155 respondents working in tourism 111 (=72%) indicated to receive formal training. 1 point is awarded for this indicator since 11 out of 15 businesses offer trainings and the majority of employees confirms that. The regularity and the professionalism of these training however, is questionable which is why 1 point is deducted.

Indicator B3.2 Payment in tourism enterprises

Since this study is written under to premises of reducing inequality and alleviating poverty through tourism the following indicator is of high importance. Payment in tourism can be low, unfair or paid incorrectly which is why four aspects of correct payment are verified.

Criterion B3: Tourism employment			
Indicator B3.2 Payment in tourism enterprises fulfilling the following criteria			
<ul style="list-style-type: none">- staff is paid the legal minimum wage- staff receives and understands the content of their payslip- the payslip combines all the legal inclusions- the payslip clearly shows how wages are calculated			
Verifier		Norm	
Interview Hotels and Restaurants	Interview Tourist Attractions		Core indicator
		0 P.	Majority of businesses fulfils 0-1 aspects
		1 P.	Majority of businesses fulfils 2-3 aspects
		2 P.	Majority of businesses fulfils all aspects
Resident Survey	Interview Hazel Milne		

This indicator is a core indicator since fair wages and correct payment are the core of remunerating people for their work and giving them a chance to provide for their families. The norm and aspects are based on recommendations by Eco Awards Namibia and the GSTC. As indicator B2.2 indicates, there is no clear agreement on a minimum wage in the tourism industry. This is why the agricultural gross minimum wage of N\$1800 per month was used as an anchor when conducting interviews and surveys.

Out of the 3 touristic enterprises that were asked, 2 indicated to pay minimum wage fulfilling all criteria. 11 out of 11 hotels and restaurants agreed to the same. Moreover, they highlighted that they offer extra benefits such as a meal per shift, HIV days, free pap smears, staff wellness days and annual bonuses. Hazel Milne stresses that a payment of minimum wages is not necessarily the case in all businesses (cf.I.50). Cleaning staff, maintenance staff and security staff are not implicitly considered tourism staff but fall under a different category. This results in a different payment of these employees. Out of the 157 survey respondents that claim to work in tourism, 66% state to earn more than N\$1800 per month,

while 19% claim for it to be less. 15% abstained from the question. Considering that all experts agree that a salary of N\$2500 per month is necessary to get by, it is alarming that almost every fifth respondent claims to earn considerably less than that. On one hand tourism enterprises claim to abide by the regulations and two thirds of staff members confirm that. By contrast, the data provides evidence that many employees in tourism are not paid fairly and correctly. This is why 1 point will be awarded in the awareness that this is a rather generous rating.

Indicator B3.3 Working hours and rest periods in tourism enterprises

Part of fair working conditions is the compliance with working hours. This indicator therefore also reflects the workers treatment and their occupational health.

Criterion B3: Tourism employment			
Indicator B3.3 Working hours and rest periods in tourism enterprises - Working hours comply with the applicable national law or industry standard - Regulations on deviations are agreed by the staff in writing			
Verifier			Norm
Interview Hotels and Restaurants	Interview Tourist Attractions	Resident survey	Basic indicator 0 P. Majority of businesses fulfils 0 aspects 1 P. Majority of businesses fulfils 1 aspect 2 P. Majority of businesses fulfils 2 aspects

The norm is based on recommendations by Eco Awards Namibia. The national law states that staff members can "work 45 hours in any week, and in any case, not more than nine hours on any day, if the employee works for five days or fewer in a week" (Minister of Labour, Industrial Relations and Employment Creation 2007, p. 26). Employers must give employees working continuously for more than 5 hours a break of at least 1 hour or alternatively 30 minutes if the employee agrees. Out of 14 hotels, restaurants and tourist attractions 12 enterprises indicated a length of shift of 9 hours or less and 2 indicated a shift longer than 9 hours. The break interval was between 30 and 60 minutes in all cases. 11 out of 14 enterprises pay extra in case of overtime, while 2 enterprise did not allow overtime at all and 1 enterprise claimed to have no-extra payment in case of overtime. These regulations form part of the employment contract. When the residents working in the tourism industry were asked about their working hours and rest periods 76% indicate that their working hours comply with the legal restrictions, 6% indicated that their company does not comply with the restrictions and 18% had individual working hours or other arrangements. Based on these findings 2 points are awarded for this indicator.

Indicator B3.4 Share of tourism enterprises using time-limited contracts instead of permanent contracts

Seasonal work can be a massive problem in tourism destinations. Employees cannot conduct any economic future planning because their employment basis is insecure. That harms the income stability in the community and encourages employee dissatisfaction.

Criterion B3: Tourism employment			
Indicator B3.4 Share of tourism enterprises using time-limited contracts instead of permanent contracts			
Verifier		Norm	
Interview Hotels and Restaurants	Interview Tourist Attractions	Basic indicator	
		0 P.	More than 66% of tourism enterprises using time-limited contracts
		1 P.	Between 33-66% of tourism enterprises using time-limited contracts
Secondary Research	Resident survey	2 P.	Less than 33% of tourism enterprises using time-limited contracts

The norm for this indicator is based on a threefold division, which has proven to be useful in this context and is inspired by Baumgartner's system. A complete avoidance of time-limited contracts is pointless from an economic perspective which is why a two-thirds-majority depicts a reasonable situation. As seen in figure 2 Namibia has no pronounced problem with seasonality, which supports the achievement of sustainable tourism practices. Among the residents working in tourism, 63% indicate to have permanent contracts, 24% to have a time-limited contract and 13% to have other types of contracts. Concerning hotels, restaurants and tourist attractions 79% claim to have mostly permanent staff while 21% mostly have fixed-term staff. The data collected by the Employment Equity Commission in the tourism and hospitality sector also considers employment contracts. As table 7 shows only 3,3% of total employees in this sector are on casual, temporary or seasonal contracts. It has to be noted that more than 95% of fixed-term employees are racially disadvantaged while racially advantaged and Non-Namibians hardly ever seem to face that problem. Both sets of data underline the rating of 2 points for this indicator.

Job Category	Racially disadvantaged		Racially advantaged		Persons with disabilities		Non-Namibian		Total		Grand Total
	Men	Women	Men	Women	Men	Women	Men	Women	Men	Women	
Total permanent	3465	3896	212	273	28	19	61	50	3757	4229	7986
Casual/ temporary and seasonal	99	164	5	4	0	0	3	0	107	168	275
Total	3564	4060	217	277	28	19	64	50	3864	4397	8261

Table 7 Tourism & Hospitality Sector - Employment 2007/2008 Survey Data - Data based on data from Employment Equity Commission 2008, p. 22

Indicator B3.5 Share of tourism enterprises with a written policy on discrimination and the management of discrimination within the institution

Since victims of apartheid policies are still facing inequalities and disadvantages, the respectful handling of social interaction at the workplace is of high importance. Policies and actions against discrimination help to establish, that any type of harassment based on race, colour, gender, national origin, sex, age, ethnicity and mental or physical disability is completely unacceptable. This indicator focuses on written policies and resultant actions.

Criterion B3: Tourism employment		
Indicator B3.5 Share of tourism enterprises with a written policy on discrimination and the management of discrimination within the institution. Actions are taken against reported instances of discrimination.		
Verifier		
Interview Hotels and Restaurants	Interview Tourist Attractions	Resident survey
Interview Hazel Milne	Interview Liesl Liebenberg	
Norm		
Basic indicator		
0 P. Majority of enterprises have no written policy. No actions are taken against reported instances of discrimination		
1 P. Majority of enterprises has a written policy <u>or</u> clearly recognizable action against reported instances of discrimination		
2 P. Majority of enterprises has a written policy <u>and</u> clearly recognizable actions against reported instances of discrimination		

The norm for this indicator is not a threefold division despite the term 'share' in the indicator's title. Since there are two variables that are taken into consideration, a mere share does not depict the complexity of the issue. This is why the norm is based on the share of businesses implementing either measure. The indicator is based on Eco Awards Namibia. Among the 16 hotels, restaurants and tourism attractions that were interviewed 8 state that there is a policy on discrimination as part of the workplace behavior policy, the HR code or the employee contract. 2 state that they do not have a policy and 6 state, that the issue of discrimination was never faced, resulting in a lack of such policy. In the resident survey 59% of tourism employees indicate that their company takes action about reported instances of discrimination, 20% indicate that no action is taken and 21% abstain from an answer. Hazel Milne describes that conflicts can arise when people from different cultures work in the same enterprise (cf.I.80). Despite the fact that there are no violent conflicts, "little arguments and people teasing each other" is not uncommon (cf.I.86). Hotel owners confirm that statement and mention that they like to contract workers from the same ethnicity for that reason. Liesl Liebenberg suggests that employees need to leave their own culture at the "doorstep of the company" and adhere to the company culture while working. Otherwise, personal conflicts could gain the upper hand. 1 point is awarded for this indicator because half of the tourism enterprises, that were checked, have a written policy. Despite

the fact, that instances of discrimination were never faced, a company should have a written policy in case they occur. More than two thirds of the respondents indicate that action against discrimination is taken, however, the clearly operational implementation is questionable due to the statements made by hotel owners about employee conflicts.

Indicator B3.6 Existence and frequency of a regular employee survey in tourism companies
Employee motivation and employee satisfaction are decisive success factors for any business. Employee surveys enable managers to gather valuable knowledge from the staff and transform this insight into efficient measures. Employees get the chance to anonymously voice their opinions, concerns or praise.

Criterion B3: Tourism employment	
Indicator B3.6 Existence and frequency of a regular employee survey in tourism companies	
Verifier	Norm
Interview Hotels and Restaurants	Basic-indicator 0 P. Majority of enterprises with no regular employee survey 1 P. Majority of enterprises with regular employee survey every 4-6 years 2 P. Majority of enterprises with regular employee survey every 1-3 years
Interview Tourist Attractions	
Resident survey	

This indicator is based on the recommendations by the German Tourism Association. The existence of a survey and its frequency are verified in the norm. Since there are two variables which are taken into consideration, a mere share does not depict the complexity of the issue.

The resident survey showed that 36% of employees in tourism businesses take part in a regular employee survey, while 64% do not. Out of the 34% the average frequency of such surveys was every 1,2 years. The interview among hotels, restaurants and tourist attractions revealed that 6/15 companies offer a regular Team Member Engagement Survey with an average frequency of every 0,75 years. On the other hand, 9/15 businesses rely on bilateral talks or monthly company meetings. Most employers claim to conduct yearly appraisals. Despite the good intention behind these measures, the lack of anonymity can constrain the employees' openness. Since the majority of businesses and employees indicated that no regular surveys take place, 0 points are awarded for this indicator.

Criterion B4: Equality

The following criterion aims at measuring equal opportunities for people of different ethnicities and genders. Regardless of a persons' physical trades businesses should give equal rights, chances and status to an employee. Ruanda is considered to be a pioneer in Africa concerning gender equality. Besides a quota for female parliamentarians, a couple of pro-women reforms and empowerment acts for young girls have been enacted (Abari 2017). Namibia has no women's quota and since the 25% ratio proposed in NEEEF failed no anti-discrimination quota either (see chapter 2.1).

Indicator B4.1 Share of tourism enterprises in which the general manager position is held by a woman

This indicator looks at the chances given to women to ascent to a position of higher responsibility. Qualifying women for leading positions can help them to gain independence and to promote the image of women in the community.

Criterion B4: Equality				
Indicator B4.1 Share of tourism enterprises in which the general manager position is held by a woman				
Verifier			Norm	
Interview Hotels and Restaurants	Interview Tourist Attractions	Interview Hazel Milne	0 P.	Basic indicator Share is below 25% or above 75%
			1 P.	Share is between 25-44% or between 56-75%
Interview Prosper Mageza	Secondary Research		2 P.	Share is between 45-55%

The aim of female empowerment is not to give them an advantage over men. This is why the norm is based on an equal 50/50 ratio in management position. Any extremely low or excessively high share is not considered sustainable. Among the hotels, restaurants and tourist attractions that were interviewed, 5/17 are run by males, 9/17 by women and 3/17 by married partners. It has to be noted that the share in hotels and restaurants is balanced out while women in management positions are more common in touristic attractions such as museum and handicraft businesses. Hazel Milne states that the gender role is changing. She says: "10 years ago, it was mostly men" (cf.I.62). Prosper Mageza estimates that 10% of the tour operators in Namibia are run or owned by women. However, he stresses that this is just an estimate which is not supported by data (cf.I.52f). The data from table 6 shows that the gender ratio at executive director level amounts to 61% male and 39% female. The quota at senior management indicates 52% males and 48% females and at middle management amounts to 46% males and 54% females. Based on these findings 2 points

are awarded for this indicator. Out of the sample, 53% enterprises are run exclusively by women, which matches the data collected by the Employment Equity Committee.

Indicator B4.2 Share of tourism enterprises in which the general manager position is held by a non-white

This indicator focuses on the disadvantages people face in the pursue of managerial positions due to their racial background. Namibia has refrained from introducing a quota yet, because measures like this entail a lot a criticism. Critics say that introducing a quota would result in the fact that enterprises need to consider the race and social background of any potential candidate over their qualifications and experiences, resulting in a structure in which race is the factor determining if a candidate can find employment.

Criterion B4: Equality			
Indicator B4.2 Share of tourism enterprises in which the general manager position is held by a non-white			
Verifier		Norm	
Interview Hotels and Restaurants	Interview Tourist Attractions	0 P.	Share is below 50%
		1 P.	Share is between 50-75%
Secondary Research	Interview Thomas Müller	2 P.	Share is above 75%

Since the deeply rooted discrimination of racially disadvantaged people has been an issue in Namibia since its independence, this indicator is considered a core indicator. The norm is based on a threefold-division. Considering that only 5% of the population is still white, it would be highly unacceptable if the share were below 50%. The limit at 75% was chosen, because the color of skin is not a direct reflection of privilege. Furthermore, many racially advantaged citizens have better access to education and especially the tourism sector is dominated by Germans.

Among the hotels, restaurants and tourist attractions that were interviewed, 35% are managed by a non-white person. Especially in the hotel and restaurant sector the white management overweighs. Thomas Müller states that especially the tourism and hospitality sector is held in the hand of white Namibians (cf.I.89). Non-white Namibians that work in tourism on a managerial level have usually studied abroad or lived abroad before returning to their home country (cf.I.94). The data from table 6 shows that 12% of executive directors and 29% of senior management are racially disadvantaged. This compares with 95% of skilled, 99% of semi-skilled and more than 99% of unskilled jobs taken by the racially disadvantaged. This data clearly indicates that 0 points will be awarded for this indicator.

Criterion B5: Tourism awareness and education

The following criterion refers to tourism awareness and education. In many cases, the community is not aware of the importance of tourism and the potential benefits it generates. Tourism represents a great opportunity for development aid and poverty alleviation and should therefore not be underestimated as a source of revenue and employment.

Indicator B5.1 Programme to raise awareness of tourism's role and potential contribution

This indicator evaluates if programmes are held among various institutions aimed at increasing the level of knowledge about tourism and showing that the tourism industry is a possible employer. Prosper Mageza explains that "the people are just not well-learned in the area of tourism and some of them do not understand the tourism concept" (cf.I.102f). He criticises that "part of the reason [the city is] struggling with tourism, especially in Windhoek, is that [there are not] enough people that have shown interest, that understand what [they] are trying to do with tourism or how tourism can actually benefit the country and the city and ultimately benefit them as well" (cf.I.105f). This is why this indicator focusses on possible education and awareness programmes.

Criterion B5: Tourism awareness and education				
Indicator B5.1 Programme to raise awareness of tourism's role and potential contribution				
Verifier			Norm	
Secondary Research	Resident Survey	Interview Grace Pujatura		Core indicator
			0 P.	Non-existence of programmes
			1 P.	Existence of irregular programmes or not among various institutions
	Interview Liesl Liebenberg	Interview Prosper Mageza	2 P.	Existence of regular programmes among various institutions

This indicator is considered a core indicator. During the research it became evident, that many residents have no connection at all to tourism. This is curious in view of the fact that it is one of the only industries growing in spite of the recession the country finds itself in. The norm is based on the GSTC criteria. 'Institutions' refers to communities, schools and higher education institutions. 'Irregular' means that these activities do not take place yearly or are not considered part of the main school curriculum.

Among the respondents from the resident survey 40% claim to know of programmes that raise the awareness of the tourism's role. The main programmes the respondents mentioned are the Tourism Expo, study courses at NUST, UNAM and IUM, the Windhoek Cultural Festival and Independence Day. Grace Pujatura confirms that there is the programme 'Teens and Tourism' with which the city "tried to engage school going children

[by taking] them through the different tourism attractions and at the same time telling them why [the city invests] in tourism and why it is important for them to convey the message to parents about the importance of tourism" (cf.I.89). Moreover, there was a programme called 'Rediscover Windhoek' and a 'Tourism Awareness' brochure (cf.I.92f). The tourism department is thinking about reviving these initiatives. Among the respondents from the survey, 1 person indicated to know 'Teens for Tourism'. Liesl Liebenberg says that "for a lot of Windhoekers [tourism] is just a side income [...] It is only the real hotel groups that understand tourism" (cf.I.11). Based on the findings 1 point is awarded for this indicator. 40% of residents seem to know a type of programme and can name it. The Tourism Expo takes place yearly and most higher education institutions seem to consider tourism in their curriculum. Nevertheless, the initiatives by the city were ceased. The expansion of community involvement through training, marketing and campaigning is still a big task. Raising awareness about the issue can also incentivise residents to protect the environmental and cultural resources in the city because they know their value for tourism.

Criterion B6: Support of local entrepreneurs and fair trade

The following criterion focuses on the advantages of supporting local businesses and purchasing goods fairly. Besides a positive environmental impact due to reduced transport distances this way of managing purchases has many economic and social benefits. By supporting local businesses more jobs are created in the community which will benefit other residents. Small businesses selling typical or regional products enhance the uniqueness of a place and can employ staff that knows the products.

Indicator B6.1 Encouragement by the DMO for tourism enterprises to purchase goods and services locally and fairly

This indicator examines if tourism businesses in Windhoek are encouraged by the DMO to purchase locally and fairly.

Criterion B6: Support of local entrepreneurs and fair trade			
Indicator B6.1 Encouragement by the DMO for tourism enterprises to purchase goods and services locally and fairly			
Verifier		Norm	
Interview Hotels and Restaurants	Interview Hazel Milne	0 P.	Core indicator The DMO does not encourage tourism enterprises to purchase goods and services locally and fair
		1 P.	The DMO encourages tourism enterprises to purchase goods and services either locally or fair
	Interview Liesl Liebenberg	2 P.	The DMO encourages tourism enterprises to purchase goods and services locally and fair

This indicator is considered a core indicator, since the environmental, economic and social dimension is affected by it. The norm is based on the GSTC and sustainable best practices. 8/8 hotels and restaurants state that they receive no encouragement from the DMO. The preference for what products to purchase lies with the companies. Hazel Milne confirms that it is the decision of the businesses (cf.I.21). She adds that many business owners just look for the best value for money neglecting other aspects (cf.I.31). Liesl Liebenberg adds that imported products are usually cheaper than Namibian products and that any private company will put their budget first (cf.I.35). This is why 0 points are awarded for this indicator.

Indicator B6.2 Share of tourism enterprises communicating their own availability or use of environmentally friendly or fair products

The following indicator verifies if tourism businesses communicate their own commitment towards purchasing sustainable products. External communication is essential to inform the customer and distinguish the own offer from competitors.

Criterion B6: Support of local entrepreneurs and fair trade			
Indicator B6.2 Share of tourism enterprises communicating their own availability or use of environmentally friendly or fair products			
Verifier		Norm	
Interview Hotels and Restaurants	Observation Hotels and Restaurants	Basic indicator	
		0 P.	Share is below 33%
Observation Tourist Information	Observation Tourist Attractions	1 P.	Share is between 33-66%
		2 P.	Share is above 66%

This indicators' norm is based on a threefold separation. Since Namibia is a very dry country, conditions for agricultural land use are tough. Products like fruit and vegetables are usually imported from South Africa. Even if one wanted to buy locally, the lack of availability of some products would not allow for that. This is why a share above two thirds of businesses buying and communicating the use of environmentally friendly products can already be considered satisfactory. 7/10 hotels and restaurants state that they communicate their availability of sustainable products. This is either done through indications on the menu, information about local produce, declaration of local meats or the use of upcycled or recycled furniture. The observation reveals that 65% hotels and restaurants and 58% of tourist attractions communicate their availability of sustainable products. The tourist information does not communicate its own availability; however, they did not seem to sell neither products nor services. Based on this information 1 point is awarded for the indicator.

Indicator B6.3 Share of tourism enterprises communicating the availability of sustainable products and services in the area to guests

The last indicator of this criterion focuses on businesses' promotion efforts for sustainable products and services in the area. A network of tourism service providers that supports each other helps the solidarity in the community and enables tourists that do not know the area to find sustainable offers that add value to their experience in the destination.

Criterion B6: Support of local entrepreneurs and fair trade			
Indicator B6.3 Share of tourism enterprises communicating the availability of local products and services in the area to guests			
Verifier		Norm	
Interview Hotels and Restaurants	Observation Hotels and Restaurants	Basic indicator	
		0 P.	Share is below 33%
		1 P.	Share is between 33-66%
		2 P.	Share is above 66%

This indicator is based on the recommendations by Eco Awards Namibia. The same threefold division as for indicator B6.2 is applied. 6/11 (=55%) hotels and restaurants confirm that they communicate the availability of local products and services in the area to guests. A best practice would be Xwama Restaurant in Katutura, which offers township tours or the NUST Hotel School which lists a number of local services in their room directory. Other businesses offer brochures and recommendations by their concierge or reception staff. The observation in hotels and restaurants shows that 11/17 (=65%) businesses clearly emphasize points of interest such as Namibian-style restaurants close-by or local craft shops. Based on these numbers 1 points is awarded for the indicator.

Evaluation: Economic Dimension:

After analyzing the 6 criteria from the economic dimension the results of the 18 indicators, 6 of them being core indicators, are displayed in the table 8 below. The results of this dimension show that the City of Windhoek sets fewer priorities in the economic area, just as in the management area. 6 of the 18 indicators receive 0 points. As in the management dimension, a strong deficit is particularly noticeable in the area of monitoring. The tourism employment sector is relatively positive. Working hours and contractual conditions are particularly positive. Despite a relatively balanced ratio of men and women, the proportion of non-whites in management positions must be highlighted as extremely negative. With regard to the support of local economy, a mixed result is noticeable. The overall result of 38% puts the economic dimension in the yellow bracket.

Detailed results: Sustainability dimension: 671 case of Windhoek

Just as in the management dimension, it has to be noted, that this dimension narrowly avoided the red bracket. Figure 14 illustrates that the economic dimension also strongly tends towards the very lower end of the yellow category.

Economic Dimension			
Indicator	Result	Quantifier	Total
B1.1	0	2x	0
B1.2	0	1x	0
B2.1	1	1x	1
B2.2	0	1x	0
B2.3	1	1x	1
B2.4	1	1x	1
B3.1	1	2x	2
B3.2	1	2x	2
B3.3	2	1x	2
B3.4	2	1x	2
B3.5	1	1x	1
B3.6	0	1x	0
B4.1	2	1x	2
B4.2	0	2x	0
B5.1	1	2x	2
B6.1	0	2x	0
B6.2	1	1x	1
B6.3	1	1x	1
		Sum = 24	Sum = 18
		$\frac{18}{(24 \times 2)} = 0.38$	

Table 8 Results economic dimension (Source: Own data)

Degree of fulfilment economic dimension

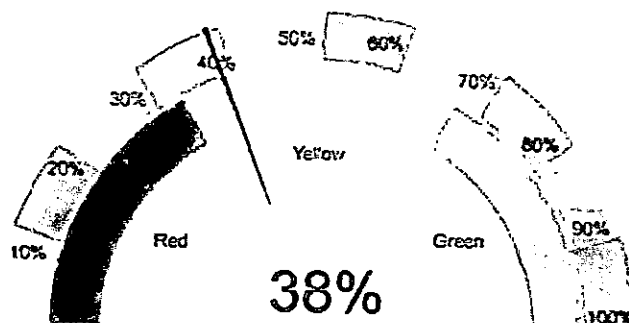


Figure 14 Degree of fulfilment economic dimension (Source: Own data)

5.3 Socio-Cultural dimension

The socio-cultural dimension is the third part of the criteria catalogue. This dimension has a particularly important meaning for this study, since it focuses specifically on the influence of history and the presentation of cultural heritage. In recent years a growth in cultural tourism could be observed. Part of cultural tourism is the visit of cultural heritage sites, cultural events, museum, galleries, theatres and literature related activities. This combination is particularly relevant for city destination as they tend to offer the most cultural activities. Windhoek has a high density of museum and art-related activities. Intangible cultural heritage like dance, music, traditions and language can also be of interest for tourists and is particularly important for Windhoek since so many different cultures are represented there.

On one hand, this dimension focuses on the management, communication, behaviour and satisfaction of visitors. On the other hand, aspects like the presentation of the history and the promotion of cultural exchange in order to strengthen the integration and participation of the local population is considered. Locals should be able to identify with the presented cultural heritage and be well-disposed towards tourism activities. Lastly, access to cultural sites for locals and people with impairments will be assessed. As always, the goal is to maximise benefits to communities, visitors and cultural heritage and to minimise negative impacts. The socio- cultural dimension is really diverse, comprising the highest number of indicators. They are divided into the following criteria:

- Criterion C1: Inventory of tourism assets and attractions
- Criterion C2: Visitor behaviour and satisfaction
- Criterion C3: Cultural heritage protection and cultural exchange
- Criterion C4: Local community opinion and access
- Criterion C5: Accessibility

Criterion C1: Inventory of tourism assets and attractions

This criterion focuses on attraction management and visitor communication. The most important cultural assets must be known to the DMO and be presented to visitors in communication materials. Moreover, residents should identify with the attractions in the destination and contribute to their valorisation for tourism.

Indicator C1.1 Current inventory and classification of tourism assets and attractions

The first indicator of this criterion examines if the DMO has an up-to-date list of their tourism assets and their communication to potential visitors.

Criterion C1: Visitor management and inventory of tourism assets and attractions		
Indicator C1.1 Current inventory and classification of tourism assets and attractions including natural and cultural sites, which is communicated to visitors		
Verifier	Norm	
Secondary Research		Core indicator
	0 P.	No inventory and no communication to visitors
	1 P.	Inventory without up-to-date visitor communication
	2 P.	Up-to-date inventory incl. classification and communication to visitors

This indicator is considered a core indicator because only what is known and classified can be marketed. The norm is based on the GSTC. The inventory should be up-to-date and publicly available. The City of Windhoek website lists "Top Attractions" on the tourism site. Most attractions are named, however important sites such as the Independence Memorial Museum or the National Art Gallery are left out. On the Namibia Tourism website, a small article about the history and geography of Windhoek can be found. Relevant content for tourism is not displayed. The filters under "Plan your trip" and "Find popular attractions" do not work properly for Windhoek. This is why 1 point is awarded for this indicator. It seems, that the website has not been updated in the past years.

Indicator C1.2 Prioritization in the communication of heritage sites

The following indicator depicts the ratio of POIs related to white history and POIs related to non-white history. The German rule lasted for a period of 30 years, so one would assume that, despite apartheid, non-white history has more local significance and should enjoy a broader representation. Nevertheless, many people feel that the heritage landscape does not commemorate the views of the majority of black people in Namibia.

Criterion C1: Visitor management and inventory of tourism assets and attractions		
Indicator C1.2 Prioritization in the communication of heritage sites		
Verifier	Norm	
Secondary Research	Visitor Survey	Basic indicator
		Share of advertised POIs related to white history outweigh percentage of POIs related to non-white history
		Share of advertised POIs related to non-white history and percentage of POIs related to white history is equal
		Share of advertised POIs related to non-white history outweigh percentage of POIs related to white history

The norm for the indicator is based on the implications of German and South African rule and on the proportion of the population represented by the respective heritage. Non-white history should outweigh white history considering a fraction of Namibia's population is still white and considering the duration of the German reign. Although the indicator only focuses on the communication of the heritage sites, additionally data about the actual preference of attractions will be analysed. The following table 9 displays every attraction named on the tourism portal of Windhoek classified by the history it represents. The author does not claim an exclusive correctness of the historical assignment of each attraction.

White history	Non-white history	Ambiguous
1. Central Railway Station	1. Heroes Acre	1. College of the Arts
2. TransNamib Museum	2. Old location cemetery	2. Old Windhoek cemetery
3. Old Prison	3. Owela Museum	3. Old brewery
4. Tintenpalast	4. Geological Survey Museum	
5. Turnhalle building		
6. Schwerinsburg		
7. Von François Fort		
8. Alte Feste		
9. Tienmannhaus		
10. Erkrath building		
11. Gathemann building		
12. Kronprinz Hotel building		
13. Christuskirche		
14. St. Marys Church		

Table 9 Classification of tourist attractions named on the tourism portal (Source: Own table based on list from the City of Windhoek tourism portal 2015)

The list illustrates how outdated the content on the website is and that the list comprises a number of attractions that cannot be considered as such, since there is no possibility to experience them. Moreover, it becomes evident that attractions related to white-history definitely outweigh POIs related to non-white history. This imbalance is not caused by the fact that there are just no other attractions related to non-white history. The Independence Memorial Museum, a variety of tours through the various parts of Katutura, Parliament Gardens, trips to the Daan-Viljoen Nature Reserve, the Botanic Garden of Namibia, visiting the layout of the Gibeon Meteorites or the National Art Gallery are not even mentioned. Figure 15 shows the top attraction of Windhoek by number of visitors based on the data obtained in the visitor survey. The green columns represent POIs related to white history and the blue columns represent POIs related to non-white history.

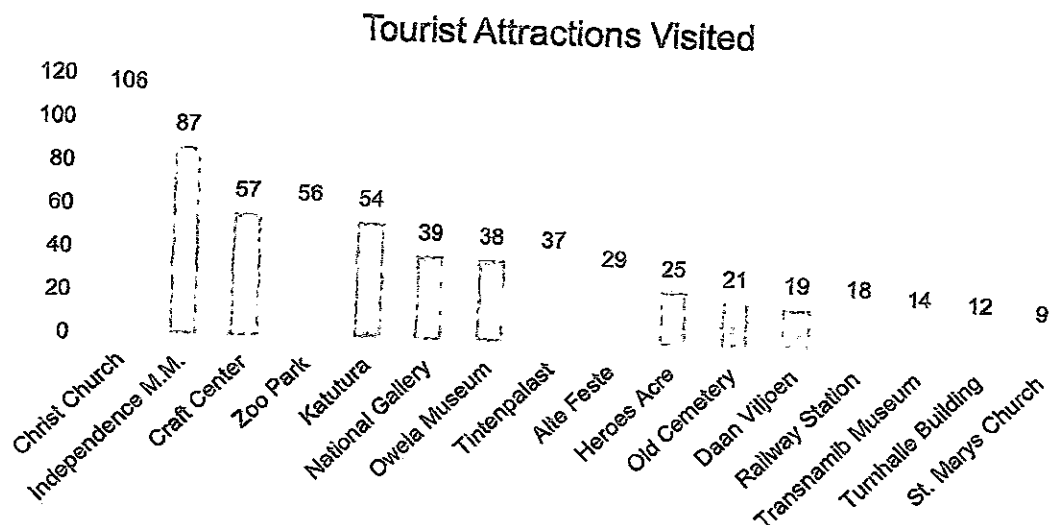


Figure 15 Top tourist attractions in Windhoek (Source: Own figure based on own data)

The figure shows that the number of visitors is quite balanced in spite of the one-sided communication by the DMO. Nevertheless, 0 points are awarded for this indicator based on the norm.

Criterion C2: Visitor behaviour and satisfaction

The following criterion focuses on visitor behaviour in the destination and on their level of satisfaction with the destination. Disrespectful demeanour at sensitive sites by tourists and inadequate instructions from tour guides can cause resentment on part of the host community. Moreover, monitoring characteristics of visitors and data on their behaviour in the destination will be discussed. Finally, the satisfaction of tourists with the destination is calculated based on different aspects of the visitors' perception of their visit to Windhoek.

Indicator C2.1 Share of sensitive tourist attractions, that have a cultural and environmental code of conduct for visitor behaviour in place

The following indicator verifies if tourist attractions have codes of conduct in place to protect and respect cultures and the environment. Many tourists show inadequate behaviour on vacation because they might be unfamiliar with rules, conventions and underlying historic or cultural meanings. Disrespectful behaviour can offend residents or cause damage to natural resources. This is why educating tourists about correct behaviour when visiting living cultures, religious sites, heritage sites and natural sites is of high importance. A code of conduct can address topics such as minimum dress code, photographic protocol, donations or etiquette.

Criterion C2: Visitor behaviour and satisfaction			
Indicator C2.1 Share of sensitive tourist attractions, that have a cultural and environmental code of conduct for visitor behaviour in place			
Verifier		Norm	
Interview Tourist Attractions	Observation Tourist Attractions		Core indicator
		0 P.	Less than 50% of tourist attractions have guidelines in place
		1 P.	Between 50-75% of tourist attractions have guidelines in place
		2 P.	More than 75% of tourist attractions have guidelines in place

This indicator is a core indicator because a central element in the socio-cultural dimension is the preservation of heritage and its respectful treatment. The norm is based on the GSTC and aims to ensure that at least half the attractions invest into a code of conduct.

Half of the tourist attractions interviewed indicate that they have a code of conduct. The code usually involves rules about noise, food and drinks, touching artefacts and photography. The observation shows that 12/15 attractions have a clearly visible code of conduct. As per the norm in the table above, 1 point is awarded for this indicator.

Indicator C2.2 Code of practice for tour guides and tour operators in the destination

This indicator focuses on a code of practice for tour guides and tour operators. Guidelines should be provided by the DMO to ensure professionalism and better service quality for tourists. The guideline should contain directives for the adequate visitor behaviour at cultural or environmental sites in order to minimize the negative impacts of tourism.

Criterion C2: Visitor behaviour and satisfaction			
Indicator C2.2 Code of practice for tour guides and tour operators in the destination			
Verifier		Norm	
Secondary Research	Interview Prosper Mageza		Basic indicator
		0 P.	Non-existence of a code of practice
		1 P.	Existence of a code of practice
		2 P.	Existence of a code of practice and clearly recognisable operational implementation

The norm is based on the GSTC. Testing the operational implementation of any code of conduct was not possible for the researchers as they did not take part in a guided tour. In 2000 the MET published a document on the adequate behavior of tour guides focusing on safety and service standards (MET 2000). In 2012 the NTB drafted a new code of conduct and ethics emphasizing tourists' safety and the exploitation of tourists. It also

proposed continued training of tour guides, prescribed registration fees of guides and disqualification criteria (Sasman 2012). Neither this document nor an updated version of the MET one can be found publicly available. Prosper Mageza states that TASA has its own code of conduct for members, that needs to be signed before registering with them (cf.I.72). Moreover, according to him, the NTB has "certain expectations of how you should operate your business but they are mainly based on the law of the country" (cf.I.79f). The TASA code of conduct contains a section on tour guide behaviour (cf.I.89). It says: "Train tour guides to respect and honour the local authorities, culture, and expectations especially during village and cultural tours" (TASA 2019). Based on the findings 0 points are awarded for this indicator. Despite the fact that TASA has its own code of conduct, not every tour operator is registered with them. The MET guidelines are outdated and potential NTB guidelines are nowhere to be found. The NTB tour operator application form does not contain any information on a code of practice. Since the indicator calls for a code of practice in the destination, 1 point cannot be granted due to the lack of a general code of practice.

Indicator C2.3 Monitoring of behaviour and characteristics of local, domestic and foreign visitors to tourist sites and attractions

This indicator verifies if tourist attractions have a monitoring system in place. Collecting data about the number of visitors, their origin, age, gender or date of visit can be very valuable for the implementation of new practices. The length of stay, purpose of visit or satisfaction with the site allow conclusions about future activities at the attraction. Visitor can also give valuable input by suggesting improvements or by drawing attention to deficits.

Criterion C2: Visitor behaviour and satisfaction	
Indicator C2.3 Monitoring of behaviour and characteristics of local, domestic and foreign visitors to tourist sites and attractions	
Verifier	Norm
Interview Tourist Attractions	Basic indicator
	0 P. Less than 50% of tourist attractions carry out monitoring
	1 P. Between 50-75% of tourist attractions carry out monitoring
	2 P. More than 75% of tourist attractions carry out monitoring

The norm for this indicator is based on the GSTC and aims to ensure that at least half the attractions conduct regular monitoring. 4/5 attraction in Windhoek state in an interview, that they monitor visitor behavior. Most of them use a book at the entrance of the attraction that asks for the number of visitors, their origin, purpose of visit and the date of visit. This data collection is a step into the right direction; however, it is rather informal since filing in the book is sometimes voluntary. Connecting monitoring efforts to the sale of tickets is also

impossible since most attractions are free of charge. Despite the minimal degree of monitoring, two points will be awarded for this indicator as per the norm above.

Indicator C2.4 Collecting data on visitor information and behaviour in the destination

The following indicator rates the extent to which data collection is conducted in the destination. Knowing about visitor behaviour and preferences can help immensely to manage tourism accordingly and to provide a higher level of service quality.

Criterion C2: Visitor behaviour and satisfaction			
<p>Indicator C2.4 Collecting data on visitor information and behaviour in the destination including the following aspects:</p> <ul style="list-style-type: none"> - Age, gender, nationality - Means of transportation in Windhoek - Means of transportation to Windhoek - Duration of visit - Type of accommodation - Reason for the visit - Attractions visited in Windhoek 			
Verifier		Norm	
<p>Interview Grace Pujatura</p>	<p>Interview Thomas Müller</p>	Core indicator	
		0 P.	Collecting data on visitor information and behaviour including 0-3 of the listed aspects
		1 P.	Collecting data on visitor information and behaviour including between 3-6 of the listed aspects
		2 P.	Collecting data on visitor information and behaviour including at least 6 of the listed aspects

This indicator is considered a core indicator because of its direct impact on management issues and the improvement of touristic services. The aspects above are based on the most common key figures in tourism visitor surveys. Disposing over data on at least three of them demonstrates that any kind of visitor monitoring is carried out. Based on these considerations that norm has been chosen. As indicator B1.2 and B2.2 confirm, the City of Windhoek does not monitor any tourism-related data. Grace Pujatura confirms that there are no city statistics but only the ones on national level (cf.I.70f). The hotel association does collect data from its members but exclusively on accommodation issues and not on visitor behavior in the destination. Thomas Müller claims that "statistical data collection is a huge problem" (cf.I.114). Based on these statements 0 points are awarded for the indicator.

Indicator C2.5 Visitor satisfaction

This indicator measures the satisfaction of visitors with their overall experience in the city.

Criterion C2: Visitor behaviour and satisfaction		
Indicator C2.5 Visitor satisfaction based on the following aspects: <ul style="list-style-type: none"> - Visitors' personal safety perception - Visitors' perception of cleanliness in public spaces - Visitors' perception of noise disturbance in the city - Visitors' orientation in the city - Visitors' knowledge about sustainability efforts in the destination - Visitors' overall evaluation of their stay in the city 		
Verifier	Norm	
Visitor Survey		Basic indicator
	0 P.	Scale 1-5 (5 being the best), Average of all answers $x \leq 3.0$
	1 P.	Scale 1-5 (5 being the best), Average of all answers $3.0 < x < 4.0$
	2 P.	Scale 1-5 (5 being the best), Average of all answers $x \geq 4.0$

This indicator is based on the ETIS. The norm was chosen under the premise that visitor satisfaction should always be the highest priority, considering a level of satisfaction below 60% unacceptable. 127 tourists responded to the questions below. Table 10 illustrated the results. The coloured line indicates the mean.

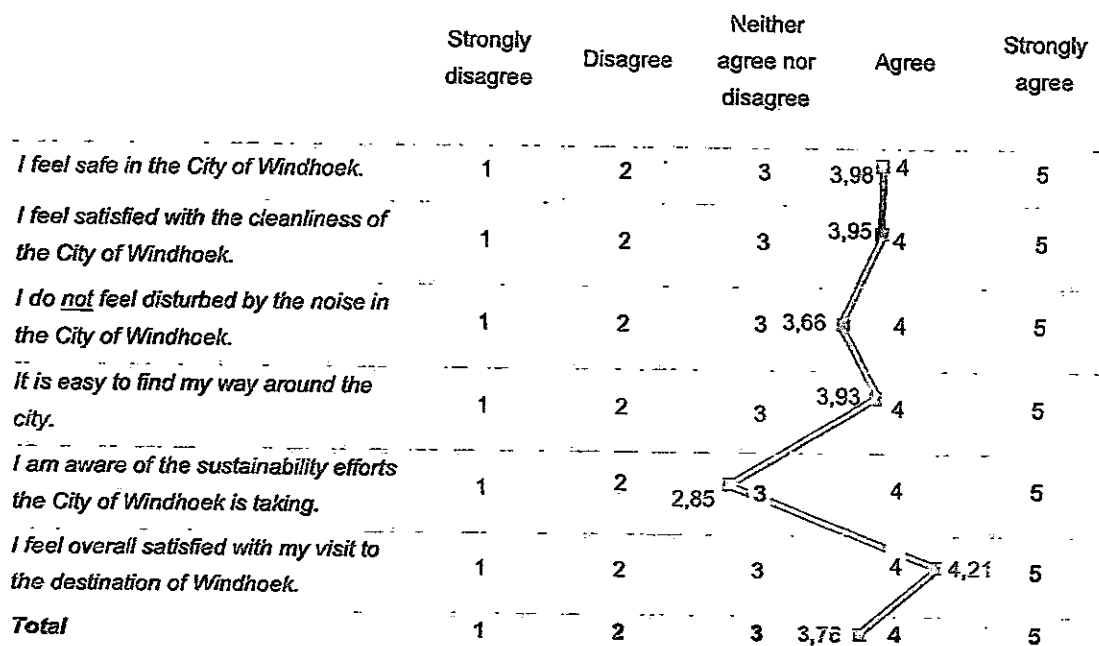


Table 10: Results of the questionnaire, concerning visitor satisfaction (Source: Own graph based on data).

It becomes evident that visitors are generally pleased with their visit to Windhoek. Especially safety and cleanliness in the city are perceived as positive. Concerning sustainability efforts

taken by the city, visitor seem to be little knowledgeable and lacking information. The mean of all individual means per question amounts to 3,76. Based on this 1 point is awarded.

Criterion C3: Cultural heritage protection and cultural exchange

The following criterion focuses on the protection of cultural heritage and on cultural exchange. "Cultural heritage sites should be identified and preserved. Local communities should be involved in their protection and should obtain economic benefits from their use by tourists" (Christie et.al. 2014, p. 99). Moreover, the marketing of tangible and intangible cultural heritage, the involvement of the host community and the representation of the sensible historic topics form part of this criterion.

Indicator C3.1 Marketing and creation of tourist products with respect to intangible cultural heritage by the DMO

This indicator verifies if tourists can experience intangible cultural heritage.

Criterion C3: Cultural heritage protection and cultural exchange	
Indicator C3.1 Marketing and creation of tourist products with respect to intangible cultural heritage by the DMO	
Verifier	Norm
Secondary Research Observation Tourist Information	Core indicator
	0 P. Non-existence of such tourist products
	1 P. Existence of such tourist products, however, difficult to find and not marketed with emphasis
	2 P. Existence of such tourist products, easy to find due to emphasized marketing

This indicator is a core indicator since intangible cultural heritage is often more meaningful than a tangible object. Products around topics such as music, dance, theatre, rituals, celebrations and language can add value for the visitor and offer authenticity. The norm is chosen similarly like for indicator A7.1. The ideal is emphasized marketing and easy orientation for the visitor.

The observation in the tourist information showed that tourist products with respect to intangible cultural heritage are scarcely marketed by the DMO. There is no emphasis or prominent position. The Namibian Craft Centre is represented by a brochure but not specifically mentioned in the list of "Top Attractions" on the website. Events can be found on the main page of the City of Windhoek, however, not linked under the tourism portal. The main page used for events is whatsonnamibia.com, which is not known to outsiders. Bookable touristic products cannot be found on the website altogether. This is why 0 points are awarded for this indicator.

Indicator C3.2 Share of the destination's events focused on traditional or local culture and heritage

This indicator evaluates if the traditional culture and heritage of Namibia is represented through events in the destination. Celebrations like Carnival and Oktoberfest are very popular; however, they only represent a small fraction of the population.

Criterion C3: Cultural heritage protection and cultural exchange			
Indicator C3.2 Share of the destination's events focused on traditional or local culture and heritage			
Verifier		Norm	
Secondary Research	Observation Tourist Information		Basic indicator
		0 P.	Share is below 50%
		1 P.	Share is between 50-75%
		2 P.	Share is above 75%

This indicator is a basic indicator based on the recommendations by the ETIS. It aims at enhancing cultural heritage and local identity. As discussed at indicator C3.1 the tourism information does not offer any overview of events in the destination. Whatonnamibia.com and the social media pages of the respective businesses are the only source of information. The list below illustrated the events in Windhoek throughout the year:

1. **Enjando Street Festival** (Festival with dancers and musicians in traditional dress)
 2. **Oktoberfest** (Imitation of the German Oktoberfest)
 3. **Bank Windhoek Arts Festival** (Largest arts festival in the country)
 4. **Maherero Day** (Memorial Day for Red Flag Herero people)
 5. **Windhoek Karneval** (German-style karneval with parade)
 6. **Independence Day** (National day with a parade and sports events)
 7. **Wild Cinema Festival** (Annual film festival also featuring Namibian films)
 8. **/AE//Gams Arts Festival** (Namibian artwork festival)
 9. **Windhoek Annual Cultural Festival** (Celebration of cultural diversity in Namibia)
- (whatsonnamibia.com 2019, Lonely Planet n.y.)

The author does not claim a completeness of the list, since information on events is difficult to obtain due to a lack of publications. 7 out of 9 events in Windhoek celebrate cultural heritage and local traditions. This represents a share of 77%, which is why 2 points are awarded for this indicator.

Indicator C3.3 Share of tourism enterprises actively promoting cultural exchange or activities

This indicator verifies if tourism enterprises actively promote cultural exchange and related activities. Cultural exchange refers to activities such as township tours, visits to African restaurants or craft markets. Raising awareness of the existence of such products can help visitors to engage with the local community and support them with their purchases.

Criterion C3: Cultural heritage protection and cultural exchange			
Indicator C3.3 Share of tourism enterprises actively promoting cultural exchange or activities			
Verifier			Norm
Interview Hotels and Restaurants	Observation Hotels and Restaurants	Observation Tourist Attractions	Basic indicator
			0 P. Share is below 50%
			1 P. Share is between 50-75%
			2 P. Share is above 75%

This indicator is based on the recommendations by Eco Awards Namibia. As with many other indicators a threefold division was chosen to ensure that at least half of the enterprises fulfil the requirements. 9/11 tourism enterprises did not answer this question. 2 claim to offer township tours and visits to Katutura. All hotels refer to brochures and information which is available at the reception. This however, cannot be deemed as 'actively promoting'. The observation shows that 6/17 (=35%) of hotels and restaurants and 5/15 (=33%) tourist attractions promote cultural exchange. Based on these numbers 0 points are awarded.

Indicator C3.4 Involvement of the host community in setting up the code of conduct at culturally or historically sensitive sites

The following indicator verifies if the host community is involved in the set-up of codes of conduct at sites, that have a sensitive cultural or environmental background.

Criterion C3: Cultural heritage protection and cultural exchange	
Indicator C3.4 Involvement of the host community in setting up the code of conduct at culturally or historically sensitive sites	
Verifier	Norm
Resident Survey	Core indicator
	0 P. The host community is not involved in the set-up of the code of conduct
	1 P. The host community is marginally involved in the set-up of the code of conduct
	2 P. The host community actively participates in the set-up of the code of conduct

This indicator is a core indicator. Rodrian states that it is important to shed light on the perspective the local community has on the colonial heritage in their country. The colonial heritage is associated with the destination but stays undesirable and dissonant to some extent. Therefore, locals are in danger of distancing themselves from the processes of staging and the colonial heritage remains 'white' in its representation (Rodrian 2009, p.85). Some Namibia-Germans have a very uncritical picture of their history which is why involving the host community is so important. The indicator is based on recommendations by Eco Awards Namibia. At first, this question was part of the resident survey. After a first sample it became evident that residents had a tendency to misunderstand this question and that there was no such thing as community involvement. Due to this, the question was removed from the questionnaire for the remaining surveys. Based on these findings, 0 points are awarded for the indicator.

Indicator C3.5 Historical and political background information at sensitive sites is provided

The following indicator verifies the presentation of history at sensitive sites.

Criterion C3: Cultural heritage protection and cultural exchange			
Indicator C3.5 Historical and political background information at sensitive sites is provided			
Verifier		Norm	
Secondary Research	Observation Tourist Attractions		Core indicator
		0 P.	Background information is not provided
		1 P.	Background information is provided from a single-perspective narrative
	Visitor Survey	2 P.	Background information is provided from a multi-perspective narrative

This indicator is a core indicator since the presentation of history influences the identification of host community and visitors to a great extent.

The observation of 12 tourist attractions which display sensitive historic events shows that 58% provide background information. 52% of the respondents from the tourist survey state that there was enough background information provided when they visited these sights. It has to be noted that many tourists take part in a city tour that is accompanied by a tour guide. Other tourists state that they were missing information at various attractions. Concerning the narrative, the observation showed that the Christ Church and the Railway station in particular display history exclusively from a 'German' point of view. The many deaths caused by the railway construction are not mentioned anywhere. Forced labour and exploitation are not stated either. Another highly critical attraction is the war memorial in Zoo park. The memorial honours the German troops that were killed fighting against

Hendrik Witbooi and his people. There is no sign or explanation whatsoever that puts in perspective how brutally the Germans conducted this operation and how many Witbooi lost their lives under German reign. The same applies to the Ovambo Campaign Memorial. The monument was erected to remember the South African soldiers, that died from an attack under the Kwanyama people. Nine soldiers were killed in that attack which is why the memorial is surrounded by nine palm trees. Even if the numbers of death cannot be set up against each other, it can be seen as highly disrespectful that nine South African soldiers are honoured with a memorial while thousands of Namibians suffered and died under their regime. If monuments of this kind should continue to be displayed in Windhoek a sign providing a multi-perspective narrative is imperative. Other attractions such as a Turnhalle building or the Gibeon Meteorites do not have any kind of information for visitors. Nevertheless, 1 point will be awarded for this indicator since more than 50% of visitors felt that enough information was provided and since more than 50% of tourist attractions actually did provide information. ~~The fact that some attractions display a very negative~~ image concerning the multi-perspective narrative should not take away from the fact that other attractions provide highly sensitive information. Despite the fact that German tourists are a major factor for Namibia, a clear image of history should be described. Fearing that German visitors would not enjoy their visit and might be made uncomfortable with their history seemed to be the case at some attractions.

Criterion C4: Local community opinion and access

The following criterion focuses on the opinion of residents on tourism activity in the city. Factors such as satisfaction with tourism, influence on one's own life and perception of representation cultural heritage are discussed. Long-term socio-cultural sustainability presupposes that residents identify with tourism and do not perceive it as a negative influence on their own lives. Moreover, tourism should not prevent locals from having access to their own important cultural sites.

Indicator C4.1 Programmes for enterprises, visitors, and the public to contribute donations to community and/ or infrastructure development

This indicator focuses on programmes that enable and encourage contributions to community initiatives. It has to be noted that community support cannot be based on donations alone. Voluntary monetary contributions can only serve as an additional source of income for the community and its development.

Criterion C4: Local community opinion and access	
Indicator C4.1 Programmes for enterprises, visitors, and the public to contribute donations to community and/ or infrastructure development	
Verifier	Norm
Visitor Survey Interview Grace Pujatura	Basic indicator
	0 P. Non-existence of programmes
	1 P. Existence of programmes, however, negligible awareness and use
	2 P. Existence of programmes and clearly recognisable use

The indicator is based on the GSTC and the norm is defined by the variables existence and use of a respective programme. Out of the 126 visitors that provided data on this indicator, 17% claimed to know of programmes that contribute to the community. 81% did not know any programmes and 2% abstained from an answer. The programmes that were named are UNESCO, the Gondwana Collection, church donations, Penduka Trust and school projects. It has to be noted that Namibia only comprises of two UNESCO World Heritage properties, both of which are not located in Windhoek. The Gondwana Care Trust and Penduka Trust both operate in Windhoek. Grace Pujatura adds that there is a community development trust that supports orphanages in Windhoek (cf.I.113). Based on the findings 1 point is awarded for this indicator. A negligible awareness and use of the programmes can be derived since the majority does not know about their existence or names programmes that do not necessarily contribute to development in Windhoek.

Indicator C4.2 Collection, monitoring and public reporting of data on resident expectations, concerns and satisfaction with destination management

The following indicator verifies if the expectations, concerns and satisfaction of the local community are monitored regularly.

Criterion C4: Local community opinion and access	
Indicator C4.2 Collection, monitoring and public reporting of data on resident expectations, concerns and satisfaction with destination management	
Verifier	Norm
Resident Survey	Core indicator
	0 P. No collection, monitoring and public reporting of data
	1 P. Collection, monitoring and public reporting of data less than every 5 years
	2 P. Regular collection, monitoring and public reporting of data within the last 5 years

This indicator is considered a core indicator since the local acceptance of tourism is a precondition for sustainable destination development. Regular surveys ensure that the DMO is aware of complaints about tourist issues and the acceptance of tourism. The indicator is based on the GSTC. The time frame of 5 years has been chosen because a population survey requires a lot of monetary and staff resources which is why it cannot be carried out annually. Usually the residents' attitude towards tourism does not change overnight but during the course of a couple years.

In the first sample, this question was part of the resident survey. Shortly, it became evident that residents had a tendency to misunderstand this question and that there was no such thing as citizen survey. Based on this understanding, the question was removed from the questionnaire for the remaining surveys. Observations and interviews during the rest of the field research reinforced the presumption that a citizen survey does not exist. Consequently, 0 points are awarded for this indicator.

In 2015 Prof. Dr. Steinbrink from the University of Potsdam conducted a broad survey among residents of Katutura for a study on poverty and tourism in Windhoek. Residents were asked about touristic activities in Katutura, their hopes and expectations concerning tourism in Katutura, their feelings towards tourism in Katutura, community benefits through tourism and the profit distribution. Steinbrink evaluates 73 interviews with Katutura residents and draws a differentiated picture from the statements (Steinbrink et.al. 2015). Although the study was only recently conducted City of Windhoek officials seemed to have no knowledge about it.

Indicator C4.3 Perception of representation of own cultural heritage by residents

This indicator is closely linked to indicator C1.2. Due to the fact that many locals do not identify with the heritage sites and have no interest in them, the perception that the heritage landscape does not commemorate the views of the majority of black people in Namibia is emphasized.

Criterion C4: Local community opinion and access		
Indicator C4.3 Perception of representation of own cultural heritage by residents		
Verifier	Norm	
Resident Survey		Basic indicator
	0 P.	Scale 1-5 (1 being the best), Average of all answers $x \geq 4,0$
	1 P.	Scale 1-5 (1 being the best), Average of all answers $2,0 < x < 4,0$
	2 P.	Scale 1-5 (1 being the best), Average of all answers $x \leq 2,0$

The norm for this indicator was chosen as per the table above. The scale classifies 1 as the best result and 5 as the worst result. Residents were asked if they feel like their own cultural heritage is underrepresented in the city of Windhoek concerning tourist attractions. The results from the rating of the 214 respondents is displayed in table 11.

	Strongly disagree 1	Disagree 2	Neither agree nor disagree 3	Agree 4	Strongly Agree 5
<i>I feel like our own cultural heritage is underrepresented in the city of Windhoek concerning tourist attractions.</i>	43	30	24	63	54

Table 11: Perception of representation of cultural heritage by residents (Source: Own table based on own data)

The data from the table results in a mean of 3,25 and a mode of 4. Among the 214 respondents, 49 participants indicated their cultural background. 61% were black, 27% coloured and 12% white. It cannot be assumed that the cultural identities of this sample can be transferred to the entire group of respondents, nevertheless, they act as an orientation. The responses are relatively evenly distributed across the answer scale. The mean and the mode indicate a tendency towards a perception of underrepresentation of own cultural heritage by the population. A possible explanation for this even distribution might be that some people are still very aware of the colonial buildings and monument, whilst other have noticed the efforts made by the city to create new Namibian monuments such as the Heroes Acre, the Three Petitioners, the Genocide Monument and the Founding Father monument. The interpretation of the data results in the rating of 1 point for this indicator.

Indicator C4.4 Perception of negative impacts caused by tourism

This indicator examines the residents' perception of negative impacts caused by tourism.

Criterion C4: Local community opinion and access	
Indicator C4.4 Perception of negative impacts caused by tourism	
Verifier	Norm
Resident Survey	Basic indicator
	0 P. Scale 1-5 (1 being the best), Average of all answers $\geq 4,0$
	1 P. Scale 1-5 (1 being the best), Average of all answers $2,0 < x < 4,0$
	2 P. Scale 1-5 (1 being the best), Average of all answers $x \leq 2,0$

Besides economic contribution and employment, tourism can also entail negative social impacts for the host community. Tourism can increase the cost of living, increase the

pressure on the local infrastructure, cause traffic jams, emissions and noise. Tourists consume energy and water and increase the amount of waste and sewage. Moreover, tourism can cause an increase in crime rates, rises in cost of living, shortage of housing and loss of a local identity. The norm for this indicator is based on the same principles as for indicator C4.3. The points are awarded as per the table above. The following table 12 displays the results from the 215 responses on this question:

	Strongly disagree 1	Disagree 2	Neither agree nor disagree 3	Agree 4	Strongly Agree 5
Tourism in Windhoek affects my living conditions in a negative way.	121	64	13	8	9

Table 12 Perception of negative impacts due to tourism (Source: Own table based on own data)

The distribution of data results in a mean of 1,7 and a mode of 1. Since Windhoek is not highly frequented by tourists the impacts on the host community are still minimal. Based on the results 2 points are awarded for this indicator.

Indicator C4.5 Changes in cost of living for locals: Perceived increase in expenditure due to tourism

This indicator examines the perception of increased cost of living for residents. Tourism can increase local price levels and especially housing cost can rise unproportionally because of offers on the home-sharing platforms. Restaurants and shops might increase prices due to a high purchasing power from tourist which excludes residents from using these services.

Criterion C4: Local community opinion and access	
Indicator C4.5 Changes in cost of living for locals: Perceived increase in expenditure due to tourism	
Verifier	Norm
Resident Survey	Basic indicator
	0 P. Scale 1-5 (1 being the best), Average of all answers $x \geq 4,0$
	1 P. Scale 1-5 (1 being the best), Average of all answers $2,0 < x < 4,0$
	2 P. Scale 1-5 (1 being the best), Average of all answers $x \leq 2,0$

The norm for this indicator follows the principles as for indicator C3.4 and C4.4. The points are awarded as per the table above. The following table 13 displays the results from the 215 answers collected in the resident survey:

	Strongly disagree 1	Disagree 2	Neither agree nor disagree 3	Agree 4	Strongly Agree 5
<i>My expenditures have increased because of the tourism in Windhoek.</i>	89	32	33	34	27

Table 13 Perception of increase in expenditure caused by tourism (Source: Own table based on own data)

The distribution of data results in a mean of 2,4 and a mode of 1. In spite of the fact, that 'Strongly disagree' was chosen most frequently, the remaining votes are fairly evenly distributed among the other four categories. This distribution results in a rating of 1 point for this indicator as per the norm.

Indicator C4.6 Access to culturally and historically important or heritage sites for residents

The following indicator verifies the entrance fees for residents at touristic attraction. Access to relevant heritage sites should be facilitated for all citizens. This is the only way to prevent tourists from visiting these places in the pursue of entertainment and education whilst the host community is excluded from any identification with the heritage site.

Criterion C4: Local community opinion and access	
Indicator C4.6 Access to culturally and historically important or heritage sites for residents	
Verifier	Norm
Observation Tourist Attractions	Basic indicator
	0 P. Majority of sites without differentiated pricing strategy
	1 P. Majority has discounted access to culturally and historically important or heritage sites for residents
	2 P. Majority of sites has free access to culturally and historically important or heritage sites for residents

The norm for this indicator is based on best practices from tourism attraction worldwide. To name a few examples: The Alcázar of Seville is free of charge for residents, Cambodians do not pay admission to visit Angkor Wat and Brazilian residents only pay 30% of the ticket price to visit the Christ Statue. Out of the 14 tourist attractions that were observed 1 had the same admission for all visitors, 1 had a discounted admission fee for residents and 12 were free of charge anyway. Based on these finding 2 points are awarded for this indicator.

Criterion C5: Accessibility

The following criterion focuses on the accessibility of public transport and touristic POIs. "Accessible tourism is a form of tourism that involves collaborative processes between stakeholders that enable people with access requirements, including mobility, vision,

hearing and cognitive dimension of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments" (Buhalis et.al. 2012, p. 3). Namibia ratified the Convention on the Rights of Persons with Disabilities in 2007 (OHCHR 2019). By signing, the country committed itself to enable "persons with disabilities to participate effectively in a free society" (bpd 2015). The criterion comprises two indicators, which will verify this commitment.

Indicator C5.1 Share of public transport that is accessible to people with disabilities and specific access requirements

The first indicator examines the availability of accessible transportation options in Windhoek.

Criterion C5: Accessibility	
Indicator C5.1 Share of public transport that is accessible to people with disabilities and specific access requirements	
Verifier	Norm
Observation Trans- portation	Observation Points of Visitor Entry
	Basic indicator
	0 P. Share is below 33%
	1 P. Share is between 33-66%
	2 P. Share is above 66%

This indicator is based on the ETIS. A threefold division for the norm was chosen based on best practices in accessible tourism. An ideal transportation layout contains roadways with same level pavements, wider pedestrian zones, usage of colours to make certain areas even more easily distinguishable, installation of ramps and lifts, floor marking, announcements through a voice messages and public transportation panels with Braille as the most common features (European Capital of Smart Tourism 2019, p. 9). Best practices in African countries concerning accessibility are hardly to be found. Cape Town has introduced a bus line operating 40 routes in the city which is universally accessible (WheelchairTravel.org 2019).

Despite the existence of a 'Sustainable Urban Transportation Steering Committee', the implementation of accessible transportation is not yet visible in Windhoek. The transportation services in Windhoek are mostly limited to cars. Depending on the type of car, a transportation of people with disabilities and specific requirements can be facilitated. Transportation between the airport and the city is only offered by cars which are called Shuttle Busses. The access to trains and busses seems to be impeded by a set of stairs at the entrance of the vehicle. Ramps, lifting platforms, explanations in braille or floor markings were hardly to be found at points of visitor entry. This is why 0 points are awarded for this indicator. Even if the norm had been chosen with a higher percentage adhering to international standards, the results would be the same.

Indicator C5.2 Share of touristic POIs that are accessible to people with disabilities or special access requirements

The second indicator of this criterion examines the availability of accessible tourist attractions in the City of Windhoek.

Criterion C5: Accessibility			
Indicator C5.2 Share of touristic POIs that are accessible to people with disabilities or special access requirements			
Verifier		Norm	
Observation Hotels and Restaurants	Observation Tourist Attractions	Basic indicator	
		0 P.	Share is below 33%
		1 P.	Share is between 33-66%
		2 P.	Share is above 66%

Like indicator C5.1, this indicator is based on the ETIS. The same threefold division for the norm was chosen based on best practices in accessible tourism. Accessible tourist attractions and hotels with universal design are difficult to find on the African continent. Best practices mostly originate from Europe, Northern America and Australia. Despite a few tour operators in South Africa that offer tours with universal access, the topic is not yet present in the mind of most business operators. During the interviews many hotel and restaurant owners claimed that accessibility is not a topic they consider, because they hardly have any guests with specific access requirements. A statement like this illustrates the refusal to offer this service and to allow guests with disabilities a stay. It is a case of a classic cause-and-effect dilemma in which the original trigger of a causal chain remains unidentified. The observation shows that 12/17 (=71%) hotels and restaurants and 7/15 (=47%) tourist attractions are wheelchair-accessible. That amounts to a total share of 59% of POIs being wheelchair-accessible. 0/15 tourist attractions have information in Braille available. As per the table above 1 point is awarded for this indicator.

Evaluation: Socio-Cultural Dimension

The analysis of the 5 criteria in this dimension results in numerous important findings and insights. Just like the management dimension and the economic dimension, the socio-cultural dimension narrowly passes the threshold of 33%. 8 topics receive 0 points, among them 4 core indicators. Deficits are particularly visible concerning marketing and communication of heritage sites, monitoring of visitor and resident data, the implementation of codes of conduct and concerning accessibility. Visitor satisfaction, the existence of events, the residents' perception of negative impacts caused through tourism and the access to important heritage sites for residents can be highlighted positively. The overall result of 35% puts the socio-culture dimension in the yellow bracket. Figure 16 illustrates

the strong tendency towards the very lower end of the yellow category. The results of the 13 basic indicator and 7 core indicators are displayed in the table 14 below:

Socio-Cultural Dimension			
Indicator	Result	Quantifier	Total
C1.1	1	2x	2
C1.2	0	1x	0
C2.1	1	2x	2
C2.2	0	1x	0
C2.3	2	1x	2
C2.4	0	2x	0
C2.5	1	1x	1
C3.1	0	2x	0
C3.2	2	1x	2
C3.3	0	1x	0
C3.4	0	2x	0
C3.5	1	2x	2
C4.1	1	1x	1
C4.2	0	2x	0
C4.3	1	1x	1
C4.4	2	1x	2
C4.5	1	1x	1
C4.6	2	1x	2
C5.1	0	1x	0
C5.2	1	1x	1
Sum = 27			Sum = 19
			$\frac{19}{(27 \times 2)} = 0.35$

Table 14 Results socio-cultural dimension /Source: Own data.

Degree of fulfilment socio-cultural dimension

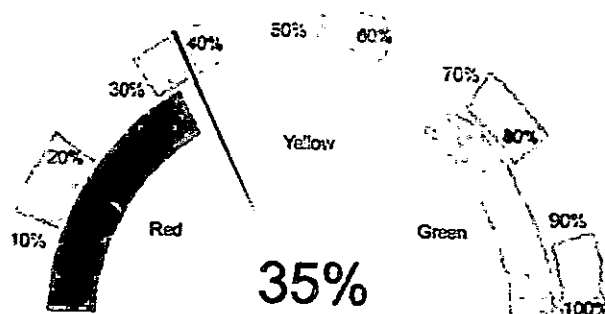


Figure 15 Degree of fulfilment socio-cultural dimension /Source: Own data/processed own data.

5.4 Ecological dimension

The last dimension will take a closer look at the ecological implications of tourism. As with the other dimensions, the focus lies on the minimization of negative ecological impacts and the maximisation of the conservation and protection of natural resources. Tourism depends on the environment, as the environment itself forms the tourist attraction or serves as a context in which the touristic activity takes place. "The environment considers natural environment, wildlife, built environment, natural resources (water, air, climate) and farmed environment (forests, agriculture, fishing)" (Mason 2010, p. 70–71).

This dependence of tourism on natural resources can result in water pollution, land degradation, soil erosion, discharges into the sea, loss of natural habitat for flora and fauna or ecological disruption which "typify negative environmental externalities associated with poorly planned tourism" (Christie et.al. 2014 p.97). The core element of ecologically sustainable tourism is the protection of natural assets on which tourism is based. "This is particularly true in Africa, variously marketed as a nature, wildlife, resort, and cultural heritage destination" (Christie et.al. 2014 p.97). If the negative impact from tourism on the destination is bigger than the environment's ability to cope with this pressure a rapid degradation of the environmental is inevitable.

In Namibia, the protection of the environment forms part of the countries' constitution. It says "*The State shall actively promote and maintain the welfare of the people by adopting [...] policies aimed at [the] maintenance of ecosystems, essential ecological processes and biological diversity of Namibia and utilization of living natural resources on a sustainable basis for the benefit of all Namibians, both present and future*" (Government of Namibia, ch. 11, art. 951). This commitment as per the constitution will be verified in the course of the analysis of this dimension. One focus in this dimension lies on the assessment of environmental risks and on programmes assisting enterprises to measure, monitor and minimize their water usage, energy consumption and solid waste production. Moreover, an analysis of measures put in place by tourism enterprises that help with energy conservation, water usage and handling of solid waste is carried out. Another aspect of this dimension is the usage of transportation in Windhoek and the availability of low-impact mobility. Lastly, the emission of greenhouse gases and the of existence recreational green spaces will be assessed. The following lists illustrated the seven criteria in this dimension:

- Criterion D1: Environmental risks
- Criterion D2: Energy conservation
- Criterion D3: Water management
- Criterion D4: Solid waste management
- Criterion D5: Low-impact transportation
- Criterion D6: Greenhouse gas emissions
- Criterion D7: Urban Recreation

Criterion D1: Environmental risks

This criterion focuses on the identification of environmental risks. The main areas which factor into the risk management are water usage, land usage, deforestation, energy consumption, solid waste handling, air and noise pollution, sewage water, impacts through construction and infrastructure and wildlife conservation. A sustainability assessment that identifies risk in the destination in a continuous cycle and the implementation of specific tools such as environmental impact assessments (EIA) can help to firmly establish environmental topics in policy making and governance.

Indicator D1.1 Sustainability assessment of the destination identifying environmental risks

This indicator verifies if the destination has a system in place to identify environmental risks.

Criterion D1: Environmental risk assessment	
Indicator D1.1 Sustainability assessment of the destination identifying environmental risks	
Verifier	Norm
Interview Mary-Ann Kahitu and Olavi Makuti	Core indicator
	0 P. No sustainability assessment of the destination, identifying environmental risks
	1 P. Sustainability assessment of the destination within the last 10 years, identifying environmental risks
	2 P. Sustainability assessment of the destination within the last 5 years, identifying environmental risks

This indicator is a core indicator. Identifying the risks in the destination is the first and most important step in order to develop remedial measures and actions. The indicator is based on the GSTC. The interval of 5 years in the norm is also provided by the GSTC. Mary-Ann Kahitu and Olavi Makuti refer to the cooperate risk register of the City of Windhoek. There is no register for environmental risks only, however some environmental risks are included in the cooperate one (cf.I.26f). They state that they are currently working on the identification of more environmental risks (cf.I.31). No indication of a time-frame is given. Based on these statements 1 point will be awarded for the indicator. It seems that any kind of sustainability assessment took place in the last 10 years and that environmental risks are identified at least partially.

Indicator D1.2 Environmental impact assessment carried out prior to the construction and planning of buildings

This indicator examines if EIAs are carried out prior to the start of a project. "An environmental impact assessment determines and describes in a report what impact a project will have on humans (including human health), on animals, plants, biodiversity, soil, water, ambient air, the climate, the landscape and cultural goods" (BMU 2019).

Criterion D1: Environmental risk assessment	
Indicator D1.2 Environmental impact assessment carried out prior to the construction and planning of buildings	
Verifier	Norm
Secondary Research Interview Hotels and Restaurants Interview Mary-Ann Kahitu and Olavi Makuti	Basic indicator
	0 P. EIA not carried out
	1 P. EIA or similar assessment carried out
	2 P. EIA carried out by an EAPAN practitioner

This indicator is based on Eco Awards Namibia. The EIA is only applicable for businesses built after 2012 and is carried out by an EAPAN (Environmental Assessment Professionals Association of Namibia) practitioner.

The City of Windhoek states that "EIAs are [...] used to understand and address the environmental consequences of particular projects and activities. [...] The review of EIAs has ensured that the impact of development on the environment is minimised" (City of Windhoek 2018, p. 92). The interview with hotels and restaurants reveals that 10/11 respondents did not know about an EIA and 1 claimed that no such thing was carried out at their property. Mr. Makuti says: "The Act from 2012 listed a few activities that [...] cannot be undertaken without an EIA. So now everyone in Namibia, even if you built 50 years ago, you are given a time frame to apply for environmental clearance. Even if you are already existing you need to develop an environmental management plan with ongoing impacts on the environment to see how you can manage those impacts" (cf.I.153f). Moreover, he states that "new projects that were approved after 2012 went through a full EIA process if [they are] listed in the act. Otherwise it is an illegal activity" (cf.I.160f). Environmental audits are carried out randomly among businesses that have received clearance (cf.I.167). Mary-Ann Kahitu adds that the problem with the audits is a lack of resources which is why the city is currently mapping out new processes and working on its structure (cf.I.178f). Based on these finding 1 point is awarded for the indicator. The legal framework for EIAs is set up and a number of businesses are mentioned in the Act. EIAs have been carried out and are constantly monitored by environmental auditors. The lack of resources and the restructuring process in the environmental department is holding up further assessment. The NEAPAN was not mentioned by any verifier.

Criterion D2: Energy conservation

This criterion focuses on the conservation of energy. Energy is used for heating and cooling, lighting, entertainment, transportation, cooking and many other aspects that have a direct connection to tourism. The conservation of energy aims at reducing the consumption of energy by using less energy or by using energy more efficiently.

Indicator D2.1 Programme assisting enterprises to measure, monitor and reduce energy consumption

This indicator verifies if the City of Windhoek offers assistance to tourism enterprises.

Criterion D2: Energy conservation			
Indicator D2.1 Programme assisting enterprises to measure, monitor and reduce energy consumption			
Verifier		Norm	
Secondary Research		Basic indicator	
		0 P.	Non-existence of programme
		1 P.	Existence of programme covering aspects partially
		2 P.	Existence of programme covering all aspects

This indicator is based on the GSTC. The points are awarded as per the table above. The City of Windhoek publishes a "Policy on Electricity" containing all policies and regulation on electricity usage. On the citizen portal residents can find an abundant list of electricity- and water saving tips, which is easy to find and to understand (City of Windhoek Citizen Portal n.y.).

Mary-Ann Kahitu and Olavi Makuti state that the City has approved a renewable energy policy in 2017 (cf.I.37). The policy encourages citizens to use green sources of energy. The concept of net metering allows citizens with solar panels to feed electricity into the grid without a reduction of the units they bought (cf.I.198). They also claim that efforts to intensify the education programmes for business owners are undertaken. Based on these findings 1 point is awarded for this indicator.

Indicator D2.2 Share of tourism enterprises taking actions to reduce energy consumption

This indicator verifies if tourism enterprises take actions to reduce their energy consumption.

Criterion D2: Energy conservation	
Indicator D2.2 Share of tourism enterprises taking actions to reduce energy consumption such as:	
-	clearly visible information & signs on display for both tourists and staff that effectively increase awareness about energy conservation
-	energy efficient light bulbs
-	daylight switches
-	movement sensors
-	using natural ventilation or electric fans for cooling spaces instead of conventional air-conditioning

Verifier		Norm	
Interview Hotels and Restaurants	Interview Tourist Attractions		Core indicator
		0 P.	0-1 aspects are fulfilled by more than 50% of enterprises
		1 P.	2-3 aspects are fulfilled by more than 50% of enterprises
Observation Tourist Attractions	Observation Hotels and Restaurants	2 P.	4-5 aspects are fulfilled by more than 50% of enterprises

The indicator and the aspects are based on the ETIS and Eco Awards Namibia. The norm is based on the consideration, that fulfilling all aspects in order to obtain 2 points would be too strict since some aspects are interchangeable and contribute to the same cause. This is why the norm was chosen as per the table above. The following table shows the share of tourism enterprises using each technology. The colored rows mark results over 50%.

Own observation		Interview with enterprises	
Aspect:	Used by:	Aspect:	Used by:
Information	17%	Information	36%
Bulbs	35%	Bulbs	65%
Switches	35%	Switches	45%
Sensors	10%	Sensors	18%
Ventilation	52%	Ventilation	59%

The observation at tourism enterprises reveals that only 'natural ventilation' is fulfilled by more than 50% of businesses. The interviews reveal that two aspects are fulfilled by more than 50% of enterprises. Considering that the observation might not always be completely accurate since the type of lightbulb or switch cannot always be identified without eliminating errors, the result obtained from the interviews will determine the final score for this indicator. Accordingly, 1 point is awarded for this indicator.

Criterion D3: Water management

This criterion evaluates the water management efforts and successes in the City of Windhoek. Three main water sources supply to Windhoek which are the NamWater-owned dams, reclamation in Goreangab and Gammams and the Windhoek Managed Aquifer Recharge Scheme (WMARS) (City of Windhoek 2018, p. 97). The extremely dry conditions in Windhoek force the City to be highly careful and aware of their water usage and to sensitive citizens and tourists about their use.

Indicator D3.1 Programme assisting enterprises to measure, monitor and minimize water usage

This indicator verifies if the City of Windhoek offers assistance to tourism enterprises.

Criterion D3: Water management	
Indicator D3.1 Programme assisting enterprises to measure, monitor and minimize water usage	
Verifier	Norm
Secondary Research Interview Mary-Ann Kahitu and Olavi Makuti Liesl Liebenberg	Basic indicator
	0 P. Non-existence of programme
	1 P. Existence of programme covering aspects partially
	2 P. Existence of programme covering all aspects

This indicator is based on the GSTC. The points are awarded as per the table above.

The City of Windhoek launched a "Zero Tolerance to Water Wastage Policy" in 2016. A new "Water Management Plan" was released in 2019. The plan states that there is a "water use education and enforcement programme to educate customers about efficient water use, to enforce water waste rules and water restrictions, and to save water" (City of Windhoek 2019b). "Dedicated City of Windhoek personnel will distribute educational materials, help customers reduce their water use and answer questions about the supply situation" (City of Windhoek 2019b). As mentioned for indicator D2.1 there is also an abundant list of electricity- and water saving tips on their citizen portal (City of Windhoek Citizen Portal n.y.). Mary-Ann Kahitu and Olavi Makuti add that the environmental department issues a permit based on clients' consumption and that overconsumption is fined (cf. I.66).

Liesl Liebenberg states that citizens can register online and do their own readings using new smart meters designed by NamWater. There are also programmes in place to become a water marshal. (cf. I. 43f). Based on these findings 2 points are awarded for this indicator.

Indicator D3.2 Management system on monitoring and publicly reporting drinking water and recreational water quality

This indicator focuses on the mechanisms to control the water quality in Windhoek. Applying certain standards and regulations for the monitoring of water quality prevent risks for human health and for the environment.

Criterion D3: Water management	
Indicator D3.2 Management system on monitoring and publicly reporting drinking water and recreational water quality	
Verifier	Norm
Interview Liesl Liebenberg	Basic indicator 0 P. Non-existence of programme 1 P. Existence of programme 2 P. Existence and clearly recognisable operational implementation of programme
Interview Mary-Ann Kahitu and Olavi Makuti	

This indicator is based on the GSTC recommendations and points are awarded as per the table above. Mary-Ann Kahitu says that the water department "has a division of scientific services where [they] have the laboratories. They extract every day and check; they inform if there is a problem and make sure that it is corrected immediately" (cf.I.106f). Olavi Makuti adds that there is a national water standard Windhoek must adhere to. The fact that portable water is mixed with reclaimed water raises the responsibility to check constantly if anything that could harm people's health has escaped the system (cf.I.116f). Liesl Liebenberg states that many residents only drink tap water. Especially farmers and tourists are known to drink bottled water. She says that many home owners use filter machines because often the water is brown due to leakages and pipe bursts. Even if it has been declared as 'drinkable' it contains residue (cf.I.55). 1 point is awarded for this indicator because there is a system in place that takes care of the monitoring and public reporting of water quality.

Indicator D3.3 Share of tourism enterprises taking actions to reduce water consumption

This indicator verifies if tourism enterprises are taking actions to reduce their water consumption.

Criterion D3: Water management	
Indicator D3.3 Share of tourism enterprises taking actions to reduce water consumption such as	
<ul style="list-style-type: none"> - clearly visible information & signs on display for both tourists and staff that effectively increase awareness about water conservation - recycling of backwash water from pool (if applicable) - water saving devices in toilets such as dual-flush mechanism or brick in cistern - rainwater usage for toilet flush - low flow devices to reduce water in showers - taps or infrared sensors on hand taps in public spaces - dry or natural garden with no need for watering (if not so: watering the garden only at night) 	

Verifier		Norm	
Interview Hotels and Restaurants	Observation Hotels and Restaurants	0 P.	Core indicator 0-2 aspects are fulfilled by more than 50% of enterprises
		1 P.	3-4 aspects are fulfilled by more than 50% of enterprises
	Observation Tourist Attractions	2 P.	5-7 aspects are fulfilled by more than 50% of enterprises

The indicator and aspects are based on the ETIS and Eco Awards Namibia. The indicator is considered a core indicator due to the highly sensible drought situation in Windhoek. The points are awarded as per the table above. The following table shows the share of tourism enterprises using each technology. The colored rows mark results over 50%.

Own observation		Interview with enterprises	
Aspect:	Used by:	Aspect:	Used by:
Information	57%	Information	90%
Toilet device	48%	Toilet device	80%
Hand taps	14%	Hand taps	27%
Natural Garden	74%	Natural Garden	67%
Low flow device	50%	Low flow device	71%
		Rainwater usage	40%
		Pool backwash	20%

The observation at hotels, restaurants and tourism enterprises reveals that two aspects are fulfilled by more than 50% of enterprises. The interview with hotels, restaurants and tourism enterprises reveals that four aspects are fulfilled by more than 50% of enterprises. It becomes apparent, that water saving is more establish than energy saving and it seems like the efforts put in by the City of Windhoek pay off. According to the norm, 1 point is awarded for this indicator.

Criterion D4: Solid waste management

The following criterion focuses on the solid waste management in Windhoek. The Solid Waste Management Division portal states that they envision to be "a world class solid waste management service provider to [their] people and become the cleanest City in the World by 2030" (City of Windhoek 2019a). Efficient waste management can help to reduce the burden on the environment, enhance the appearance of the city and stimulate recycling.

Indicator D4.1 Programme assisting enterprises to measure, monitor and minimize the handling of solid waste and the sustainable disposal of waste that is not reused or recycled

This indicator verifies the existence of programmes that help business owners with their waste management.

Criterion D4: Solid waste management			
Indicator D4.1 Programme assisting enterprises to measure, monitor and minimize the handling of solid waste and the sustainable disposal of waste that is not reused or recycled			
Verifier		Norm	
Secondary Research	Interview Mary-Ann Kahitu and Olavi Makuti	Basic indicator	
		0 P.	Non-existence of programme
		1 P.	Existence of programme covering aspects partially
		2 P.	Existence of programme covering all aspects

The indicator is based on the GSTC. The points are awarded as per the norm above. The City has published a "Solid Waste Management Policy" which specifies different types of waste and their adequate disposal. It promotes the principle of reducing, reusing and recycling any type of waste and emphasizes that all enterprises have a duty of care when generating waste. This principle demands that generators of waste have proper planning in place to ensure safe storage of the waste, responsible transportation, and disposal at a licensed waste disposal facility. The document comprises 11 objectives concerning the future handling of waste in the City of Windhoek. They include projects involving the community to educate and inform citizen about adequate waste management and raising awareness for the topic (City of Windhoek n.y.). Moreover, citizens can download a "Waste Removal Calendar" on the department website (City of Windhoek 2019a). Mary-Ann Kahitu and Olavi Makuti mention initiatives for private household, for clean-up campaigns and for charges on plastic bags (cf.I.133f). Initiatives that contribute directly to the education of enterprise owners are not mentioned. Based on the findings 1 point is awarded.

Indicator D4.2 Share of tourism enterprises taking actions to reduce and recycle solid waste

This indicator verifies if tourism enterprises are taking actions to reduce their solid waste.

Criterion D4: Solid waste management	
Indicator D4.2 Share of tourism enterprises taking actions to reduce and recycle solid waste such as	
<ul style="list-style-type: none"> - clearly visible information & signs on display for both tourists and staff that effectively increase awareness about waste problems - clearly labelled bins for different types of waste - reduction of the amount of disposable goods or single-serve items - waste storage in a secured and proper waste site to prevent scavenger access or wind dispersion 	

Verifier		Norm	
Interview Hotels and Restaurants	Observation Hotels and Restaurants		Core indicator
		0 P.	0-1 aspects are fulfilled by more than 50% of enterprises
		1 P.	2-3 aspects are fulfilled by more than 50% of enterprises
	Observation Tourist Attractions	2 P.	4 aspects are fulfilled by more than 50% of enterprises

The indicator and aspects are based on the ETIS and Eco Awards Namibia. The indicator is considered a core indicator due to the highly sensible drought situation in Windhoek. The points are awarded as per the table above. The following table shows the share of tourism enterprises using each technology. The colored rows mark results over 50%.

Own observation		Interview with enterprises	
Aspect:	Used by:	Aspect:	Used by:
Information	23%	Information	50%
Various bins	39%	Various bins	100%
Single-use items	52%	Single-use items	70%
Waste storage	52%	Waste storage	90%

The observation at hotels, restaurants and tourism enterprises reveals that two aspects are fulfilled by more than 50% of enterprises. The interview with hotels, restaurants and tourism enterprises reveals that three aspects are fulfilled by more than 50% of enterprises. According to the norm, 1 point is awarded for this indicator. The figures 17 and 18 show a polite, educational and amusing way to effectively increase awareness about water conservation and waste reduction to visitors. This is a best practice example.

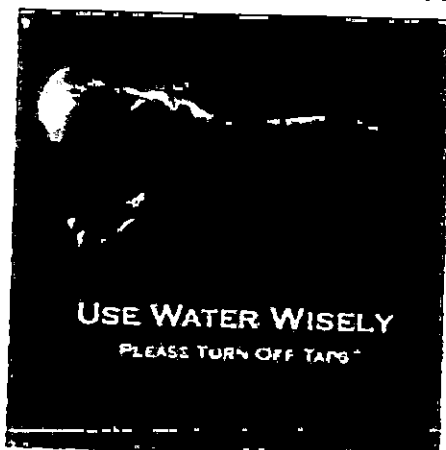


Figure 17 Sign to increase awareness about water conservation



Figure 18 Sign to increase awareness about waste reduction

Criterion D5: Low-impact transportation

Low-impact mobility includes walking, cycling and public transportation or electric scooters. Some of these options need to be electronically charged or have a very short lifespan which deteriorates their environmental performance. Nevertheless, they produce none or only little CO₂ emissions compared to other modes of transportation. This criterion will focus on the promotion, availability and use of low-impact transportation for touristic purposes.

Indicator D5.1 Programme increasing the use of low-impact transportation in order to make sites of visitor interest more accessible to active transportation

The first indicator in this criterion verifies if the City of Windhoek has programmes in place that promote low-impact transportation and guarantee low-impact access to touristic POIs.

Criterion D5: Low-impact transportation			
Indicator D5.1 Programme increasing the use of low-impact transportation in order to make sites of visitor interest more accessible to active transportation			
Verifier		Norm	
Secondary Research	Interview Clarence Rupingena		Basic indicator
		0 P.	Non-existence of programme
		1 P.	Existence of programme
	Observation Hotels and Restaurants	2 P.	Existence and clearly recognisable operational implementation of programme
	Observation Tourist Attractions		

This indicator is based on the GSTC recommendation for public transportation and active transportation such as walking and cycling. The norm is based on the existence of institutional framework and visible implementation efforts in the city. In 2016 a committee was established to oversee the "implementation of the Sustainable Urban Transport Master Plan (SUTMP) and the "Move Windhoek Project" (City of Windhoek 2016, p. 28). "The objective of the SUTMP is to provide efficient, affordable, equitable, safe and convenient public and non-motorised transport to the residents of the City" (The City of Windhoek 2017, p. 50). Public transportation is only weakly developed, as is the range of public and non-motorized transportation. The City of Bremen is currently supporting the whole of Namibia in a project aimed at promoting the mobility of the population (GIZ 2018). Moreover, the GIZ is working on facilitating cargo-bikes and bike-sharing in Windhoek. Clarence Rupingena states that he is "currently working on financial support for the implementation of the first phase of non-motorised transport (nmt) (cf.I.37f). One aim is to make sure that "people are safe and comfortable when walking" (cf.I.41). He identifies the lack of walkways as a major problem that also causes road fatalities. Furthermore, he explains that getting funding for nmt-projects is difficult since road funds cannot be used, as walkways are not

seen as part of the road (cf. I.54f). This statement supports the assumption that a clearly operational implementation is hardly recognizable in the city, despite the introduction of the SUTMP two years ago.

The observation shows that 47% of POIs are accessible by foot and 72% by car. 0% are accessible by bike as there are no bike lanes or bike stands.

Walkways and pedestrian crossings are either not existent or in bad conditions. Figure 19 shows a damaged walkway on Independence Avenue which is always highly congested by residents and tourists. Based on these findings 1 point is awarded for the indicator because programmes are in place, however not yet fully implemented.

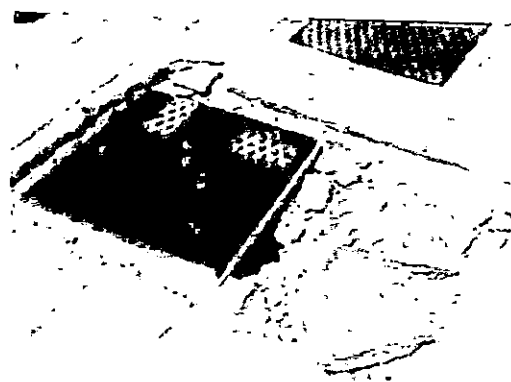


Figure 19 Damaged walkway on Independence Avenue (Source: Own photograph)

Indicator D5.2 Availability of different means of transportation on guest arrivals in the city

The following indicator examines the means of transportation available for guests arriving in the city. The arrival can take place by plane, train or bus.

Criterion D5: Low-impact transportation			
Indicator D5.2 Availability of different means of transportation on guest arrivals in the city			
Verifier		Norm	
Secondary Research	Observation Points of Visitor Entry		Basic indicator
		0 P.	Only transportation by car is available to the guest
		1 P.	Different means of transportation are available, however, scarcely communicated
		2 P.	Different means of transportation are existent and communicated to the visitor (public transport with priority)

This indicator is based on the recommendations by the German Tourism Association. The norm is two-folded and considers availability as well as communication.

The Husea Kutako website offers a search tool for transport by train or bus, which does not work properly. The observation shows that only taxis which are called 'shuttle busses' are available for transportation at the airport. They operate in various sizes and are sometimes referred to as 'bus'. Apart from that, private shuttle services can be booked. The only other alternative is the hire of a rental car. The same situation can be observed at the bus and train station. This is why 0 points are awarded for this indicator.

Indicator D5.3 Percentage of tourists using low-impact mobility to get around in the city

The last indicator in this criterion focuses on the share of tourists that mainly use low-impact mobility to move around the city during their stay.

Criterion D5: Low-impact transportation	
Indicator D5.3 Share of tourists using mainly low-impact mobility to get around in the city	
Verifier	Norm
Visitor Survey	Core indicator
	0 P. Share is below 33%.
	1 P. Share is between 33-66%.
	2 P. Share is above 66%.

This indicator is a core indicator since it displays the actual means of transportation that are used by tourists and therefore directly contributes to the emission of CO₂. The indicator is based on the ETIS. Visitors were asked what kinds of transportation (max. 2) they mainly use in the City of Windhoek. Figure 20 illustrates the frequency with which the possible answers were given.

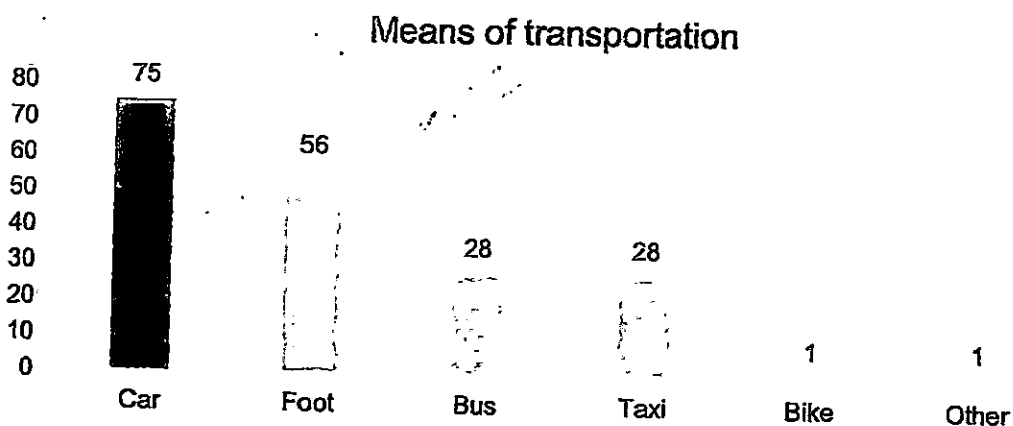


Figure 20 main means of transportation by tourists in Windhoek (Source: Own graph based on own data)

60% of tourists move around the city using their own car or a rental car. 45% indicate walking as one of their main means of transportation. 24% claim to use neither a car nor a taxi as a main transportation option during their stay. The majority of them uses a bus to get around town though. It can be assumed that the term 'bus' does not refer to a public bus but to a coach bus on which they travel with a group. Despite the fact, that this is also a vehicle powered by fossil fuels, a larger number of passengers in one vehicle reduces the CO₂ emissions per person. This is why 24% will be calculated as tourists using mainly low-impact mobility to get around in the city. In any case this translates to 0 points for this indicator.

Criterion D6: Greenhouse gas emissions

Greenhouse gases (GHG) are gases that trap the heat inside the atmosphere. The main greenhouse gases are carbon dioxide (CO₂), Methane (CH₄), Nitrous Oxide (N₂O) and various fluorinated gases (Environmental Protection Agency 2019a). The main sources for greenhouse gases are human-made. Industry, electricity, transportation and agriculture belong to the biggest producers. A rapid increase in the level of GHG in the atmosphere can be noted since the 1950s (Environmental Protection Agency 2019b). Tourism activity contributes to this phenomenon. "The transport sector produced 7.0 GtCO₂eq of direct GHG emissions in 2010 and hence was responsible for approximately 23% of total energy-related CO₂ emissions" (IPCC 2014, p. 603). "Emissions from the transport sector have more than doubled since 1970, and have increased at a faster rate than any other energy end-use sector" (IPCC 2014, p. 605). The figure in the appendix illustrated that 72% of these direct GHG emissions of the transport sector are induced by road transportation and 6,5% by international aviation. In an ideal case, these transportation figures can be broken-down even further into purposes of travel. The second figure in the appendix shows that in Germany 4,5% of motorised individual travel is induced by holidaymaking and 35,3% is induced by leisure travel (Bundesministerium für Verkehr und digitale Infrastruktur 2019, p.225) This criterion aims at evaluating if greenhouse gases are monitored. Aspects of this assessment are the cycle in which they are measured and the knowledge about industry-specific emissions.

Indicator D6.1 Monitoring of greenhouse gas emissions

This indicator verifies if the emission of greenhouse gases is monitored in Windhoek.

Criterion D6: Greenhouse gas emissions	
Indicator D6.1 Monitoring of greenhouse gas emissions	
Verifier	Norm
Secondary Research	Interview Mary-Ann Kahitu and Olavi Makuti
	Basic indicator
	0 P. Greenhouse gas emissions are not monitored
	1 P. Greenhouse gas emissions are monitored less than once a year
	2 P. Greenhouse gas emissions are monitored once a year, classified by sector

The norm for this indicator contains various aspects. First of all, the existence of a monitoring of greenhouse gas emissions is verified. Secondly, the timeframe is considered. A cycle of one year might seem strict, however, greenhouse gas emissions are a serious worldwide problem and international standards should apply to every country. Lastly, the

classification by sector is checked in order to determine which sector emits how much greenhouse gases.

The "Mayoral Report" of 2016 contains a section on the "National Greenhouse Gas Inventory Working Group". It is a working group "that is tasked with the responsibility of compiling Namibia's greenhouse gas inventory and report to the UN" (City of Windhoek 2016, p. 22). Mary-Ann Kahitu and Olavi-Makuti also refer to the national inventory. Olavi Makuti says that "as a city [they] have attempted two years ago to start compiling [their] own greenhouse gas inventory but this is still at an infant stage" (cf.I.9f). A city inventory and a classification by sector is planned according to them (cf.I.18f). Based on these findings, 0 points are awarded for this indicator.

Criterion D7: Urban recreation

Recreational areas are spaces that predominantly serve the purpose of recreation. Sport fields and green spaces such as parks or nature reserves count towards that. Residents and tourists can use these spaces for leisure purposes such as walking, jogging, riding a bike, picnicking or playing ballgames.

Indicator D7.1 Proportion of areas designated as recreational green space in relation to total area

This indicator examines the share of areas designated as recreational areas compared to the total urban area.

Criterion D7: Urban recreation			
Indicator D7.1 Proportion of areas designated as recreational green space in relation to total area			
Verifier		Norm	
Secondary Research	Interview Uakazuwaka Kazombiase		Basic indicator
		0 P.	The proportion of the green spaces in the city is less than 5%
		1 P.	The proportion of the green spaces in the city is between 5-10%
		2 P.	The proportion of the green spaces in the city is more than 10%

This indicator is based on the recommendations by the German Tourism Association. The norm is based on best practices. The share of areas designated as recreational areas compared to the total urban area amounts to 12,64% in Hannover and to 8,6% in Bremen (Sanders 2016). The City of Windhoek has quite a number of public parks. The main ones are illustrated in figure 21. The figure only displays the CBD and its surroundings. Outside of the CBD the Avis Dam, Daan Viljoen Nature Reserve, UN Plaza, Khomasdal and

Detailed results: Sustainability dimension 7089 the case of Windhoek

Wanaheda sport fields, Goreangab Dam and Brakwater Recreational Parks need to be named.

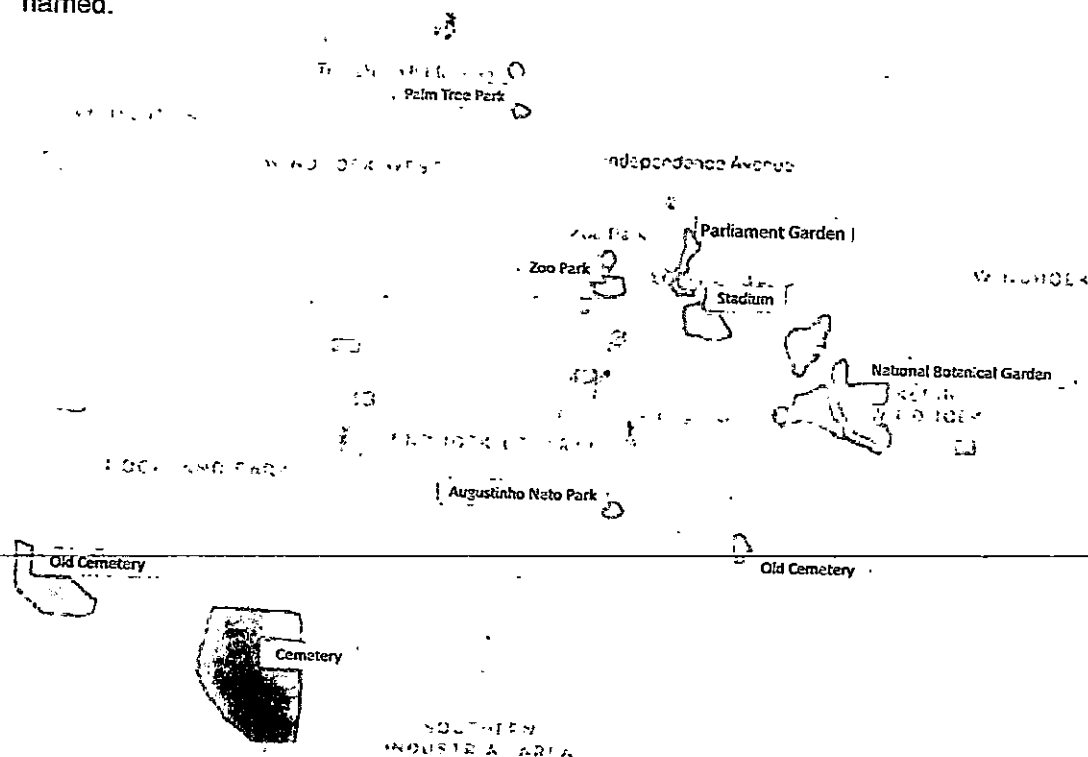


Figure 2: Parks and green spaces in Windhoek central (Source: Own figure based on Google maps)

The owner structure of the parks in Windhoek is complicated. The Palmtree Park belongs to the TransNamib, the Zoo Park belongs to the City of Windhoek, the Parliament Gardens are run by the government and the National Botanical Garden is part of the Botanical Association. It has to be noted that the cemeteries do not qualify as recreational spaces and that many parks lie fallow because of the severe drought. Mr. Kazombiaze, who is the park manager in Windhoek, explains that areas designated as sport and recreational spaces are called public open spaces (POS). An exact indication of square kilometres for each parc is not available for Windhoek. Mr. Kazombiaze states that the responsible department is of the opinion that there are more than enough parks in Windhoek which is why they are currently trying to renovate the existing parks by not only installing children playground facilities but also by creating outdoor gym areas for adults. Since there is no exact data on the size of the recreational green spaces in Windhoek the proportion is based on an estimate. Considering the map section in figure 21, approximately 5% of the urban area are covered in green spaces. When adding the green spaces outside of the CDB and the statements from Mr. Kazombiaze, well over 5% can be acknowledged. This is why 1 point is awarded for this indicator.

Evaluation: Ecological dimension

The analysis of the 7 criteria in this dimension concludes the detailed analysis. The results of the 9 basic indicator and 5 core indicators are displayed in the table below:

Ecological Dimension			
Indicator	Result	Quantifier	Total
D1.1	1	2x	2
D1.2	1	1x	1
D2.1	1	1x	1
D2.2	1	2x	2
C3.1	2	1x	2
C3.2	1	1x	1
C3.3	1	2x	2
D4.1	1	1x	1
D4.2	1	2x	2
D5.1	1	1x	1
D5.2	0	1x	0
D5.3	0	2x	0
D6.1	0	1x	0
D7.1	1	1x	1
		Sum = 19	Sum = 16
		$\frac{16}{(19 \times 2)} = 0.42$	

Figure 22 Results ecological dimension (Source: Own data)

Degree of fulfilment ecological dimension

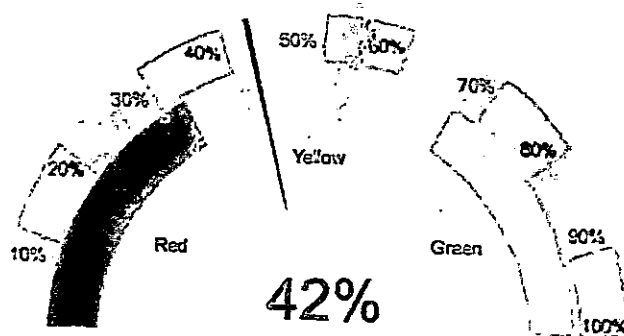


Figure 23 Degree of fulfilment ecological dimension (Source: Own data)

Unlike the previous dimensions, the ecological dimension manages to exceed the 33% limit by almost 10%. Comparatively few indicators are awarded with 0 points. The deficits can be seen particularly in the area of public transport and greenhouse gas monitoring. The city's efforts in the area of water saving are particularly positive. The topics risk, energy and

waste management are fulfilled with an average degree. The final result of 42% classifies the dimension in the yellow bracket, albeit not around the lowest edge. Figure 23 illustrates the score of this dimension, displaying it as the best one among the four dimensions.

5.5 Extended analysis

The following chapter aims at combining the results from the previous sub-chapters in order to derive conclusions for the overall situation in Windhoek. Four dimensions with 25 criteria and 70 indicators were examined and rated. The results are now interpreted by transferring them to the traffic light system by Baumgartner and the five-point scale by Ko. As described, 33% and 66% act as the threshold between the categories proposed in chapter 4.4. The red category indicates an absolute need for action, the yellow category indicates an alarming limit and the green one indicates a safe condition (Baumgartner 2008, p. 213). The gauge charts at the end of each dimension shows that the management dimension has been classified as red while the economic and socio-cultural dimension are yellow. The fact that no dimensions is classified as acceptable according to table 2, categorizes tourism in Windhoek as 'unsustainable' and 'problematic in the short- and medium-term' according to the combined dimension evaluation as proposed by Baumgartner (see table 3). Using the barometer of sustainability and the five-point scale proposed by Ko to classify the degree of fulfilment results in the following figure 24:

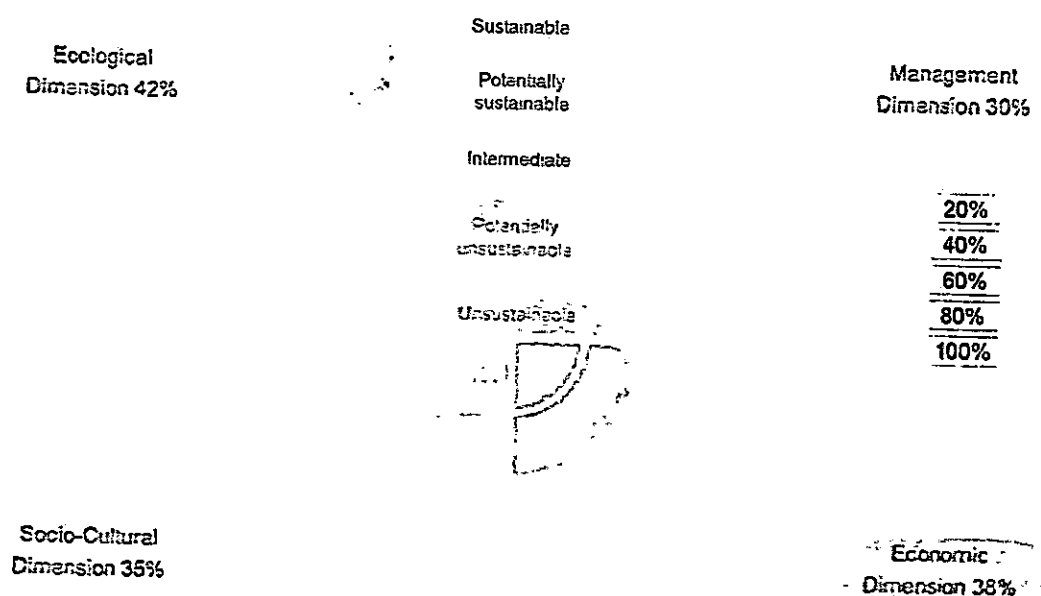


Figure 24: Degree of fulfilment of sustainability dimensions of tourism in Windhoek according to a five-point scale (Sources: Own calculation based on data).

It becomes clear that the management, economic and socio-cultural dimension classify as 'potentially unsustainable'. The ecological dimension is located in the 'intermediate' range. The figure clearly demonstrates the low overall degree of fulfilment reached in this

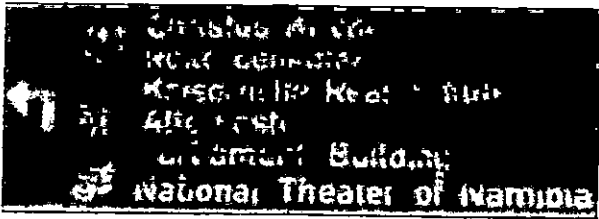
destination. It becomes evident that there is much space for improvement and considerable need for action. The closest sustainability assessment that can be awarded is "the precarious situation with need for action" (Baumgartner 2008, p. 214). The list of recommended actions which will be evaluated in the following chapter can act as a task list for the improvement of tourism development in Windhoek.

6. List of recommended actions for the City of Windhoek

The following chapter describes recommended actions for each of the four dimensions. The recommended actions are displayed in a table indicating the dimension, the field of action, the respective measures, a time horizon and a potential responsibility. The responsibility is a recommendation for possible cooperation with the tourism department. The author does not claim a completeness of the list nor a correct assignment of departments. Most measures are linked to indicators and therefore might be similar to them in their wording. The time horizon is split into the following four categories: immediate, short-term, medium-term and long-term. Immediate recommendations can be fixed within less than two months, short-term recommendations aim at a time horizon of one year, mid-term recommendations aim at 1-3 years, while long-term action can be envisioned up to 2025. It has to be noted that every field of action requires ongoing monitoring and might need reoccurring attention. The following table identifies every dimension, its fields of action and a total of 40 measures in order to manage tourism in Windhoek more sustainably.

Management Dimension		
Field of action A1: Structure and responsibility	Measure 1: Clear allocation of individual DMO employees for the implementation of the new tourism strategy. Clearly defined areas of responsibility within the DMO.	
	Time horizon: Short-term	Responsibility: DMO
	Measure 2: Assigning a staff member within the DMO that is responsible for sustainable tourism. The employee has sufficient competence and time resources.	
	Time horizon: Immediate	Responsibility: DMO
Field of action A2: Monitoring	Measure 3: Active collection of data on environmental, economic, social, cultural and tourism management issues. The data collection reviewed every 5-10 years.	
	Time horizon: Long-term	Responsibility: DMO, NSA, External consultancies, Department of Economic Development, Department of Environmental Protection

<p>Field of action</p> <p>A3:</p>	<p>Measure 4:</p> <p>Improvement of walkways along roads relevant to tourism. A more detailed description of the condition of the pavements can be found in chapter 5.4. Furthermore, a safe pedestrian crossing between the Christ Church and the Independence Memorial Museum is urgently needed. Figure 25 illustrates the difficulties and dangers that tourists accept when crossing the roundabout between the two attractions.</p>  <p>Figure 25 Crossing between Christ Church and Independence Memorial Museum (Source: Own photograph)</p>						
<p>Maintenance</p>	<table border="1"> <tr> <td data-bbox="451 808 776 958"> <p>Time horizon: Immediate</p> </td><td data-bbox="776 808 1362 958"> <p>Responsibility: Department of Urban and Transport planning, Department of Infrastructure</p> </td></tr> <tr> <td colspan="2" data-bbox="451 958 1362 1780"> <p>Measure 5:</p> <p>Improvement of the appearance of the Tourist Information. The current Tourist Information has a dark glazed facade accessible only by ringing a bell. This set-up is not inviting for tourists that are in search of information. In addition, there is still an old container with a misleading sign in Independence Avenue. This sign must be removed in order to prevent confusion among tourists. There should be one clearly identifiable and inviting Tourist Information. Figure 26 and 27 show the current situation.</p> <div style="display: flex; justify-content: space-around;">   </div> <p>Figure 26 Misleading sign on container Figure 27 Existing Tourist Information building</p> </td></tr> <tr> <td data-bbox="451 1780 776 1856"> <p>Time horizon: Immediate</p> </td><td data-bbox="776 1780 1362 1856"> <p>Responsibility: DMO</p> </td></tr> </table>	<p>Time horizon: Immediate</p>	<p>Responsibility: Department of Urban and Transport planning, Department of Infrastructure</p>	<p>Measure 5:</p> <p>Improvement of the appearance of the Tourist Information. The current Tourist Information has a dark glazed facade accessible only by ringing a bell. This set-up is not inviting for tourists that are in search of information. In addition, there is still an old container with a misleading sign in Independence Avenue. This sign must be removed in order to prevent confusion among tourists. There should be one clearly identifiable and inviting Tourist Information. Figure 26 and 27 show the current situation.</p> <div style="display: flex; justify-content: space-around;">   </div> <p>Figure 26 Misleading sign on container Figure 27 Existing Tourist Information building</p>		<p>Time horizon: Immediate</p>	<p>Responsibility: DMO</p>
<p>Time horizon: Immediate</p>	<p>Responsibility: Department of Urban and Transport planning, Department of Infrastructure</p>						
<p>Measure 5:</p> <p>Improvement of the appearance of the Tourist Information. The current Tourist Information has a dark glazed facade accessible only by ringing a bell. This set-up is not inviting for tourists that are in search of information. In addition, there is still an old container with a misleading sign in Independence Avenue. This sign must be removed in order to prevent confusion among tourists. There should be one clearly identifiable and inviting Tourist Information. Figure 26 and 27 show the current situation.</p> <div style="display: flex; justify-content: space-around;">   </div> <p>Figure 26 Misleading sign on container Figure 27 Existing Tourist Information building</p>							
<p>Time horizon: Immediate</p>	<p>Responsibility: DMO</p>						

Maintenance	<p>Measure 6:</p> <p>The signage of tourist attractions is partly outdated and refers to attractions that no longer exist or that are not accessible. Examples are the Reiterdenkmal or the Kaiserliche Real Schule, as displayed in figure 28. The information on these signs should be pasted over or renewed to avoid confusion.</p>  <p><i>Figure 28 Signposting in Windhoek (Source: Own photograph)</i></p> <table border="1"> <tr> <td>Time horizon: Immediate</td><td>Responsibility: DMO, Department of Urban and Transport planning</td></tr> </table>	Time horizon: Immediate	Responsibility: DMO, Department of Urban and Transport planning		
Time horizon: Immediate	Responsibility: DMO, Department of Urban and Transport planning				
<p>Field of action</p> <p>A4:</p> <p>Tourism Forum</p>	<p>Measure: 7</p> <p>Identification and integration of relevant stakeholder groups by the DMO and organization of regular meetings. A tourism forum can help to improve communication among the sectors and enable cooperation.</p> <table border="1"> <tr> <td>Time horizon: Medium-term</td><td>Responsibility: DMO</td></tr> </table>	Time horizon: Medium-term	Responsibility: DMO		
Time horizon: Medium-term	Responsibility: DMO				
<p>Field of action</p> <p>A5:</p> <p>Transportation</p>	<p>Measure 8:</p> <p>Upgrade Husea Kutaku Airport and facilitate transportation between Airport and City. Due to the rise in arrival numbers an extension and renewal of the airport should be on the agenda within the next years. Moreover, a mode of transportation other than car between Airport and City should be facilitated.</p> <table border="1"> <tr> <td>Time horizon: Long-term</td><td>Responsibility: Husea Kutaku Airport, Ministry of Finance, Ministry of Urban Development, Public Enterprises</td></tr> </table> <p>Measure 9:</p> <p>Introduction of a system that identifies and monitors taxi drivers and their activities. Transportation to and from the airport and within in the city has to be safe, transparent and evident to visitors.</p> <table border="1"> <tr> <td>Time horizon: Medium-term</td><td>Responsibility: Namibia Road Authority, Department of Infrastructure and Transportation</td></tr> </table>	Time horizon: Long-term	Responsibility: Husea Kutaku Airport, Ministry of Finance, Ministry of Urban Development, Public Enterprises	Time horizon: Medium-term	Responsibility: Namibia Road Authority, Department of Infrastructure and Transportation
Time horizon: Long-term	Responsibility: Husea Kutaku Airport, Ministry of Finance, Ministry of Urban Development, Public Enterprises				
Time horizon: Medium-term	Responsibility: Namibia Road Authority, Department of Infrastructure and Transportation				

List of recommended actions for the C 714 Windhoek

Field of action A6:	Measure 10: Updating the promotional material. The promotional materials must use the same cooperative design and be updated in content. The attractions mentioned must be checked for their relevance. Wrong street names, poor quality images and dark colours on a dark background should be avoided.	
	Time horizon: Short-term	Responsibility: DMO
Communication and promotion	Measure 11: It is important to develop Windhoek as <u>one</u> city. Katutura and Windhoek Central should not be treated as separate places. Katutura is among the top 5 visited tourist attractions (see chapter 5.3). Instead of just offering township tours, operators that already service the routes to Katutura must be persuaded to incorporate more spending opportunities for tourists in their itineraries. Only by communicating and offering tourism products featuring Katutura, a long-term integration can be established.	
	Time horizon: Medium-term	Responsibility: DMO and tour operators
	Measure 12: Creation of an event calendar, which clearly displays all events of the city. Holidays, festivals, theme days, parades, cultural and sport events should be part of this calendar. A slimmed down version may be available in print and a more comprehensive version on the website. This will make it easier for tourists to find out about what is happening in the city on a daily basis.	
	Time horizon: Short-term	Responsibility: DMO
	Measure 13: Reorganization of the Tourist Information set-up. Brochures for Windhoek and Namibia are mixed. Brochures for local or sustainable products are not highlighted in a specific way. Information material about other cities around the world is displayed first and foremost on the presentation tables and many brochures are distributed twice. The set-up should be designed so that tourists can easily orient themselves and find what they are interested in.	
	Time horizon: Immediate	Responsibility: DMO
	Measure 14: Revision of the internet presence of the city. The City of Windhoek website has a section called "Tourism Portal". The information on this page is partly outdated. The so-called "Tourism Website" does not function properly. Guests cannot directly book products or receive contact details for further enquiries.	
	Time horizon: Short-term	Responsibility: DMO and IT-Team

Communication and promotion	Measure 15: The DMO must offer bookable products for the guest. This way, the DMO not only acts as an informant, but also as a seller of tourist products; be it city tours, arrangements, combined packages or tickets for attractions. The DMO thus acts as an intermediary between the suppliers and the customer. Only places which can be experienced and which are based on a bookable service can create unique experiences which go beyond mere sightseeing.	
	Time horizon: Short-term	Responsibility: DMO and touristic partners

Economic Dimension		
Monitoring	Field of action B1:	Measure 16: Establishment of a monitoring and reporting system for touristic key figures (arrivals, overnights, monthly distribution of arrivals and overnights, expenditure data, bed occupancy rate, revenue and employment)
		Time horizon: Medium-term Responsibility: DMO, Cooperation with TASA or HAN
		Measure 17: Establishment of a regular monitoring and reporting of direct and indirect contributions of tourism to political level. Tourism can only be recognized as a relevant sector if its numerical contribution to the economy is clearly stated.
		Time horizon: Medium-term Responsibility: DMO, Cooperation with TASA or HAN
Education and training	Field of action B2:	Measure 18: Offering training for tourism companies. Many companies have very little entrepreneurial knowledge, especially in the field of digitisation. Due to their limited knowledge of Online Travel Agencies and the acquisition of direct bookings, their dependence on tour operators is increased. Acquiring more direct bookings would leave more money in the destination. In an age of digitalisation, it is important to be able to pick up guests at any touch point of the customer journey and to provide a specialised service both before and after the trip. Topics such as visibility, online booking ability and guest review management are part of that service. The use of information systems (PMS, HOS, CRS, etc.) also simplify internal processes many times over.
		Time horizon: Medium-term Responsibility: DMO, NTA

List of recommended actions for the C716 Windhoek

	Measure 19: Due to the fact that many business owners have no training in tourism themselves, but are career changers, the people in management positions often lack the qualifications to impart knowledge. The topic of service quality has no national standard or seal. A training programme that highlights best practices and trends in the hotel and tour operator industry can help fill this knowledge gap. Particular attention can be paid to the training of women and disadvantaged people.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, NTA
Field of action B3: Tourism Tax	Measure 20: Renewal of the tourism tax system. Accommodation establishments must register with the NTB. Based on this registration the tourism tax is collected. Accommodations pay a tourism levy which is subject to the meal plan. However, these payments are not always demanded by the NTB. The businesses that do not carry out proper bookkeeping can fill out their tourism levy form to the best of their knowledge and belief, which partly happens in favour of their own business. Through this system characterised by a lack of transparency, much of the state's money is lost, which could flow into city-wide tourism projects. A revision of the system is therefore indispensable.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, NTA

Socio-Cultural Dimension		
Field of action C1: Monitoring	Measure 21: Collecting data on visitor information and behaviour in the destination including the following aspects: age, gender, nationality, means of transportation in Windhoek, means of transportation to Windhoek, duration of visit, type of accommodation, reason for the visit, attractions visited in Windhoek, etc.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, NSA
	Measure 22: Collecting data on visitor satisfaction with the destination including the following aspects: visitors' personal safety perception, visitors' perception of cleanliness in public spaces, visitors' perception of noise disturbance in the city, visitors' orientation in the city, visitors' knowledge about sustainability efforts in the destination, visitors' overall evaluation of their stay in the city, etc.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, NSA

112

List of recommended actions for the City of Windhoek

Field of action C3: Code of conduct	Measure 27: Reinforcement of the code of practice for tour guides in the destination. Despite the fact that TASA has its own code of conduct, not every tour operator is registered with them. A common code of practice can ensure a respectful presentation of cultural heritage, explaining history from a multi-narrative perspective and emphasizing local culture over colonial or apartheid history.	
	Time horizon: Long-term	Responsibility: DMO, NTB
	Measure 28: Encouraging touristic enterprises to set up a code of conduct for their visitors. The code of conduct can help to preserve artefacts, protect the environment, respect living cultures and to stop tourists from disrespectful behaviour.	
	Time horizon: Medium-term	Responsibility: DMO, NTB
Field of action C4: Tourism awareness	Measure 29: Resume programmes to educate residents on tourism and to raise the awareness for tourism. Programmes like 'Teens and Tourism', 'Rediscover Windhoek' and the 'Tourism Awareness brochure' should be revived, since many residents have no connections to tourism and know little about its possible benefits (see chapter 5.2).	
	Time horizon: Medium-term	Responsibility: DMO, NTA, Education Institutions
	Measure 30: In addition to measure 29 new programmes that support this initiative should be developed. Education institutions can start to educate students about tourism from an early age on. Tourism is one of the most important sectors in the country and offers many job and development opportunities.	
	Time horizon: Long-term	Responsibility: DMO
Field of action C5: Accessibility	Measure 31: Facilitate access to public transport to people with disabilities and specific access requirements. As public transportation in general first needs to be established this measure is considered for long-term implementation (see measure 37)	
	Time horizon: Long-term	Responsibility: Department of Infrastructure, Department of Urban and Transport planning, Division Smart City

Accessibility	<u>Measure 32:</u> Facilitate access to touristic POIs to people with disabilities or special access requirements. Hotels, restaurants and tourist attractions are responsible themselves for installing aids for people with special requirements, since it is not made mandatory by law. The installation of ramps, lifts, voice announcements, writings in Braille and of disabled-friendly toilets is a first step towards an inclusive society.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, hotels, restaurants and tourist attractions

Ecological Dimension		
<u>Field of action</u> D1: Sustainability assessment	<u>Measure 33:</u> Establish a risk register for tourism issues exclusively. Despite the fact that tourism issues are part of the cooperate risk register for the organization a separate register identifying risk for the tourism sector should be established.	
	<u>Time horizon:</u> Medium-term	<u>Responsibility:</u> DMO, Department of Environmental and Cultural Heritage protection
<u>Field of action</u> D2: Waste and electricity management	<u>Measure 34:</u> Educate business owners on their options to save energy. The research revealed that water saving measures are already well established while energy saving measures are not fully implemented by most businesses. Educating businesses on existing possibilities can help to improve their qualification.	
	<u>Time horizon:</u> Long-term	<u>Responsibility:</u> DMO, Department Electricity
	<u>Measure 35:</u> Educate business owners on their options to reduce, recycle and reuse waste. Like with measure 34, the awareness about waste management is still subject to further improvement. Avoiding single-use products, cutting down on individually packed items and separating waste correctly needs to be established as a best practice.	
	<u>Time horizon:</u> Long-term	<u>Responsibility:</u> DMO, Department Solid Waste Management

Field of action D3: Low impact transportation	Measure 36: Enhance walkways, enable cycling routes and provide bicycles. Windhoek has a strongly underused unique selling proposition. The proximity of the individual attractions to each other on foot offers excellent conditions for non-motorized mobility. The improvement of walkways, the construction of cycle paths and supplying bicycles for tourists can add value to the tourism experience while at the same time protection the environment.	
	Time horizon: Medium-term	Responsibility: Department of Infrastructure, Department of Urban and Transport planning
	Measure 37: Strengthening of public transportation. In order to make mobility more sustainable, the dependence on cars must be reduced. This change can be achieved through safe, affordable and well-developed public transport.	
	Time horizon: Long-term	Responsibility: Department of Infrastructure, Department of Urban and Transport planning
Field of action D4: Monitoring of greenhouse gases	Measure 38: Establishing a monitoring system on city level. The research has shown that efforts to compile GHG emissions on a national level are undertaken at the moment. Effective long-term management can only take place by also measuring the emissions in specific areas.	
	Time horizon: Medium-term	Responsibility: Department of Environmental Services
	Measure 39: After having installed a monitoring system on city level, an evaluation of the quantity of GHG emitted by each sector is the next logical step. Chapter 5.4 discusses how emissions from the transport sector can be divided into means of transportation and further indicate the quantity of tourism-induced GHG emissions by splitting the transportation statistic up into purposes of travel.	
	Time horizon: Medium-term	Responsibility: Department of Environment
Field of action D5: Sustainability awards	Measure 40: Sensitising tourism businesses about the fact that sustainability efforts not only act as marketing tools but also benefit businesses and employees, is critical. This mentality must be embedded in the company's philosophy. Apart from Eco Awards Namibia, more awards should be given for Best Eco Practices and Green Business Initiatives. These awards can act as an incentive to establish a green mindset in the companies.	
	Time horizon: Medium-term	Responsibility: DMO and potential partners

7. Conclusion

A number of points can be identified as the central findings of the study. Windhoek is a city with potential for future sustainable tourism development. Although some measures and prerequisites are already in place, major deficits can still be identified in the four dimensions of sustainability. The country's local conditions are still very strongly represented in some areas, whereas very noticeable progress has already been made in other areas in terms of redistribution and empowerment. The analysis of the indicators has shown that three out of four dimensions are 'potentially unsustainable' and one is 'intermediate'.

Limitations of the study must also be acknowledged in the conclusion. A first limitation is that "the method entails a high investment in time and money for data collection. Above all, it requires a comprehensive and time-consuming survey and investigation of a destination on site" (Hartmann and Stecker 2019, p. 4). Since the data collection was carried out by a small team and within two weeks, the results do not represent a global analysis of tourism in Windhoek. Moreover, the research was conducted in the month of September and does thus, not fully represent the touristic situation in Windhoek throughout the year. In order to assess development processes at the destination, the investigation would have needed to be conducted at various points over an extended period of time. It can also be added, that not every relevant stakeholder was available during the period of investigation on site, which is why the information from interviews could have been more extensive.

Despite the efforts of the researchers, no comprehensive representativeness can be assumed for the surveys and the businesses observed. Both, the questionnaires as well as the checklists were conducted at different places and in different parts of the city. Nevertheless, the final choice of who to ask and which restaurant to enter and to observe was based on subjective opinions, despite the researchers' best efforts to guarantee randomness. In the surveys in particular, it cannot be ruled out that questions were misunderstood and thus distorting the results. „Ambiguity in a question can mean that the respondent cannot understand what is being asked or understands a different question from the one intended" (Brace 2008, p. 15).

It has to be noted that many indicators are rated with a good score, however, this is often not caused by excellent management efforts but by the fact that tourism is not yet developed to an extent that might harm residents or resources. The research has shown that measuring the sustainability in a tourist destination always entails a certain degree of ambiguity. This assessment of sustainability in tourism in Windhoek would need to be repeated with the same methodology in the future in order to allow for comparative results. As of now the City of Windhoek has 40 proposed recommendations for action to work with. They can help to compensate for the deficits and to advance towards long-term sustainable development. An integration of these study results into the final 'Targeted Windhoek Tourism Development Strategy' developed by PricewaterhouseCoopers is highly recommended.

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1) Resident survey:

We are students of the Namibia University of Science and Technology and the University of Applied Sciences in Bremen, Germany. We are conducting a survey on the sustainability of tourism in Windhoek. Could you please answer a few questions about your perspective on tourism in Windhoek? The evaluation is anonymous.



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1. Gender

☐ Male ☐ Female ☐ Other

2. Age

☐ Under 15 ☐ 15-29 ☐ 30-44 ☐ 45-59 ☐ 60 and over

3. Do you know of any programs for collecting data on the expectations, concerns, and satisfaction of the people of Windhoek regarding the touristic city management?

☐ Yes ☐ No

Comments: _____

4. Do you know of any programs held in communities, schools and higher education institutions that raise awareness about the role of tourism and its contribution to Windhoek?

☐ Yes ☐ No

Comments: _____

Please rate the following statements on a scale of 1-5 according to your own opinion:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
5. I feel like our own cultural heritage is underrepresented in the city of Windhoek concerning tourist attractions.	1	2	3	4	5
6. Tourism in Windhoek affects my living conditions in a negative way.	1	2	3	4	5
7. My expenditures have increased because of the tourism in Windhoek.	1	2	3	4	5

8. Most historically or culturally sensitive touristic sites have a code of conduct (minimum dress code, photographic protocol, donations, etiquette) for visitors. Are you aware of any involvement from the people of Windhoek in setting up these codes of conduct for touristic sites in Windhoek?

☐ Yes ☐ No

Comments: _____

9. Are you working in the **tourism sector** (accommodation, tour guide, tour operator, attractions, hospitality, tourist shops, transportation, etc.)?

☐ No. Thank you for your participation! ☐ Yes. Please continue below.

10. Do you receive a formal training appropriate to your skill level.

☐ Yes

☐ No

11. Is your salary higher than or equal to the national legal minimum wage? (N\$1800 per month)

☐ Yes, higher

☐ No, lower

☐ No comment

12. Do you have fixed working hours and rest periods?

☐ Yes

☐ No, because my company does not comply with the legal time restrictions. (max. 9h a day with 1h break)

☐ No, because the nature of my working hours is flexible.

☐ Other

13. What type of employment contract do you have?

☐ Permanent employment contract

☐ Time-limited employment contract

☐ Other

14. Does your company take action about reported instances of discrimination?

☐ Yes

☐ No

☐ No comment

15. Are regular employee surveys conducted in your company? If so, how often?

☐ Yes → Every ____ year(s).

☐ No

II) Visitor survey:

We are students of the Namibia University of Science and Technology and the University of Applied Sciences in Bremen, Germany. We are conducting a survey on the sustainability of tourism in Windhoek. Could you please answer a few questions about your visit to Windhoek? The evaluation is anonymous.



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1. Gender

☐ Male ☐ Female ☐ Other

2. Age

☐ Under 15 ☐ 15-29 ☐ 30-44 ☐ 45-59 ☐ 60 and over

3. Nationality: _____

4. What kind of transportation do you mainly use in the City of Windhoek?
(choose two options max.)

☐ Car ☐ Bus ☐ Taxi ☐ Bike ☐ By foot ☐ Other _____

5. Which site(s) did you visit during your stay in Windhoek?

- | | |
|---|--|
| ☐ Christ Church | ☐ Independence Memorial Museum |
| ☐ Tintenpalast (Parliament Building) | ☐ Heroes Acre |
| ☐ Namibia Craft Center (Old Brewery) | ☐ Trans-Namib Transport Museum |
| ☐ Zoo Park | ☐ Daan Viljoen Nature Reserve |
| ☐ Alte Feste | ☐ Owela Museum |
| ☐ Katatura | ☐ St Mary's Cathedral |
| ☐ Old Windhoek Cemetery | ☐ Turnhalle Building |
| ☐ Windhoek Railway Station | ☐ National Art Gallery of Namibia |
| ☐ Other: _____ | |

6. Did you feel like having enough historic background information when visiting these sites?

☐ Yes ☐ No

Comments: _____

7. Are you aware of any programs for visitors to contribute donations to the community and/ or infrastructure development? (e.g. trusts or public funds)

☐ Yes ☐ No

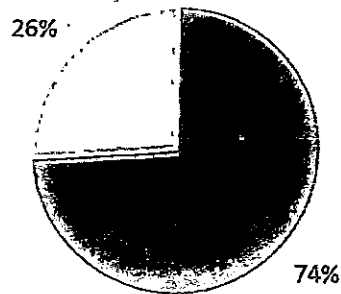
Comments: _____

Please rate the following statements on a scale of 1-5 according to your own opinion.

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
8. I feel safe in the City of Windhoek.	1	2	3	4	5
9. I feel satisfied with the cleanliness of the City of Windhoek.	1	2	3	4	5
10. I do <u>not</u> feel disturbed by the noise in the City of Windhoek.	1	2	3	4	5
11. It is easy to find my way around the city.	1	2	3	4	5
12. I am aware of the sustainability efforts the City of Windhoek is taking.	1	2	3	4	5
13. I feel overall satisfied with my visit to the destination of Windhoek.	1	2	3	4	5

III) Detailed statistical data resident survey

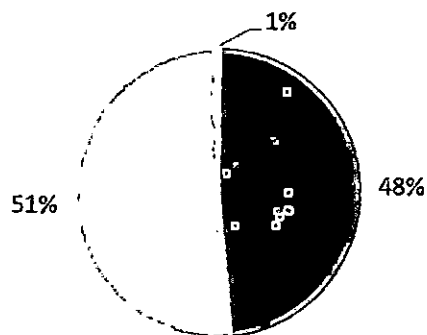
Interview Location



■ CBD ■ Katutura

Question 1

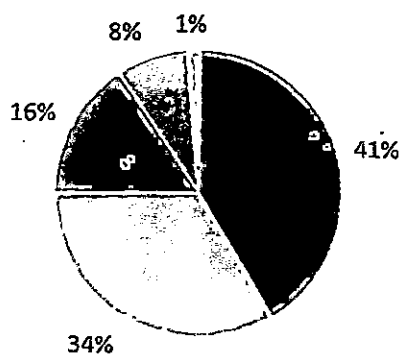
Gender



■ Female ■ Male ■ No comment

Question 2

Age distribution among residents

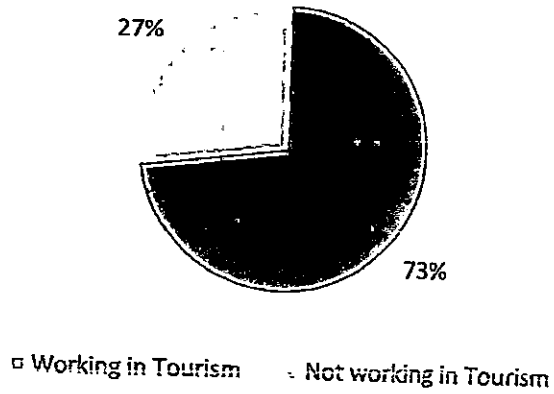


■ 15-29 ■ 30-44 ■ 45-59 ■ 60 and over ■ No comment

Question 3,4,5,6,7 and 8 – see chapter 5.2 and 5.3

Question 9

Share of respondents employed in tourism

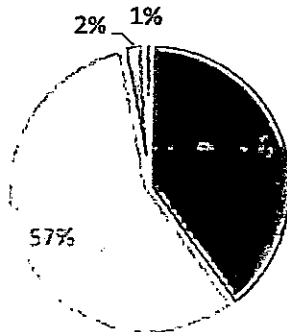


Question 10 – see chapter 5.2

IV) Detailed statistical data visitor survey

Question 1

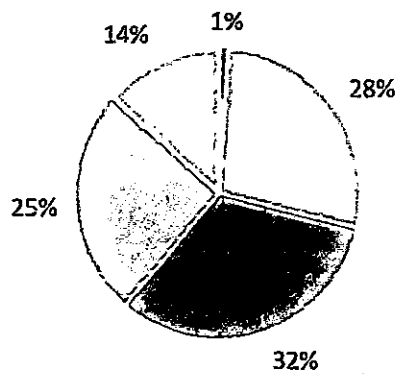
Gender



Female Male Other No comment

Question 2

Age distribution among tourists

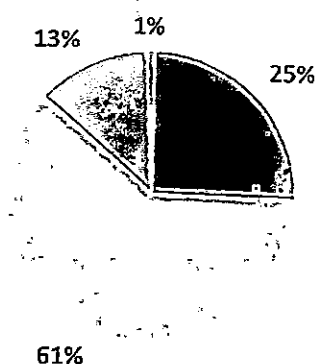


under 15 15-29 30-44 45-59 60 and over

Question 3

7367

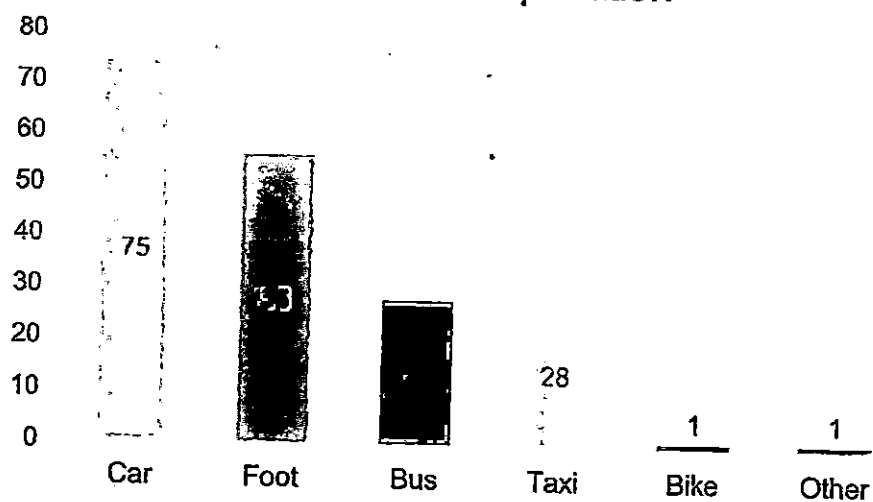
Origin



- Namibia and other African countries
- European countries
- Other overseas source markets
- No comment

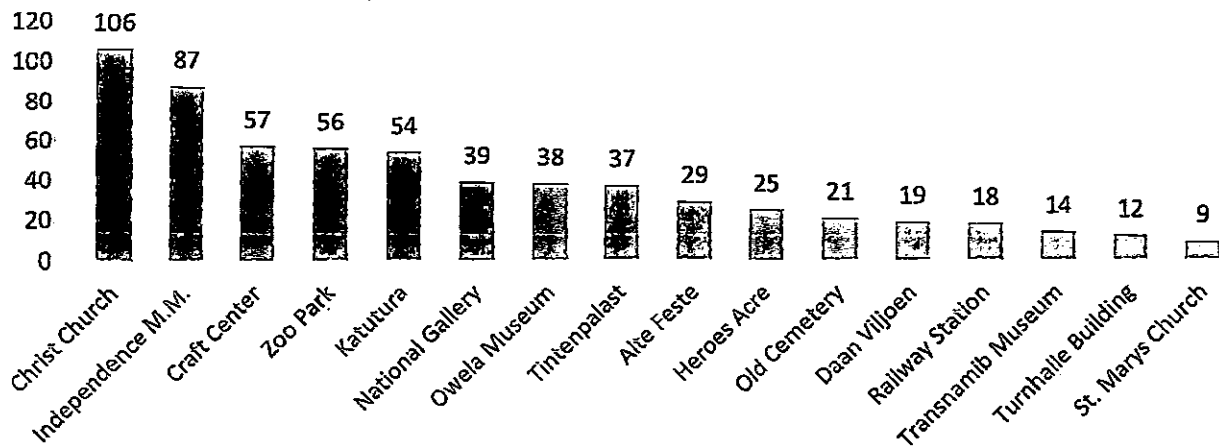
Question 4

Mean of transportation

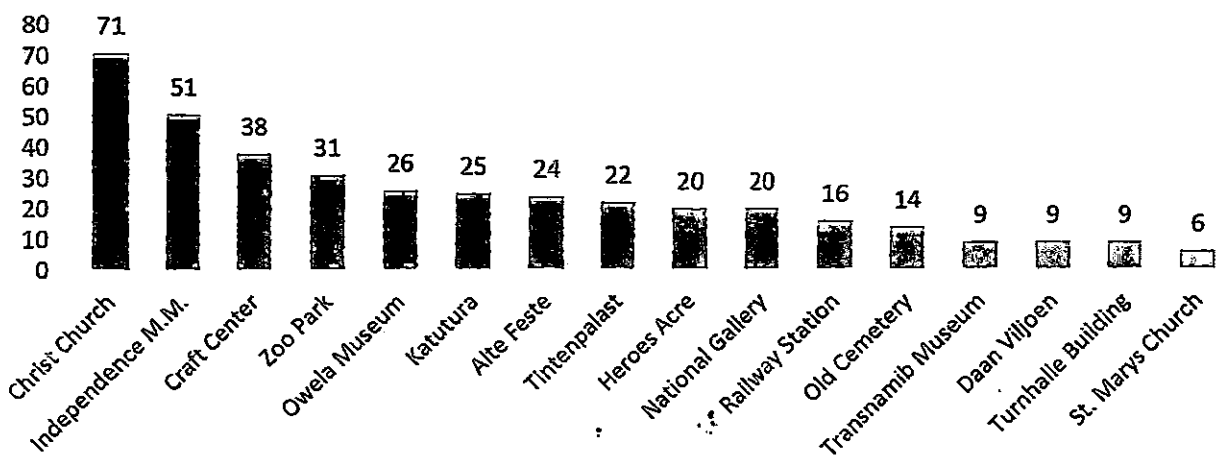


Question 5

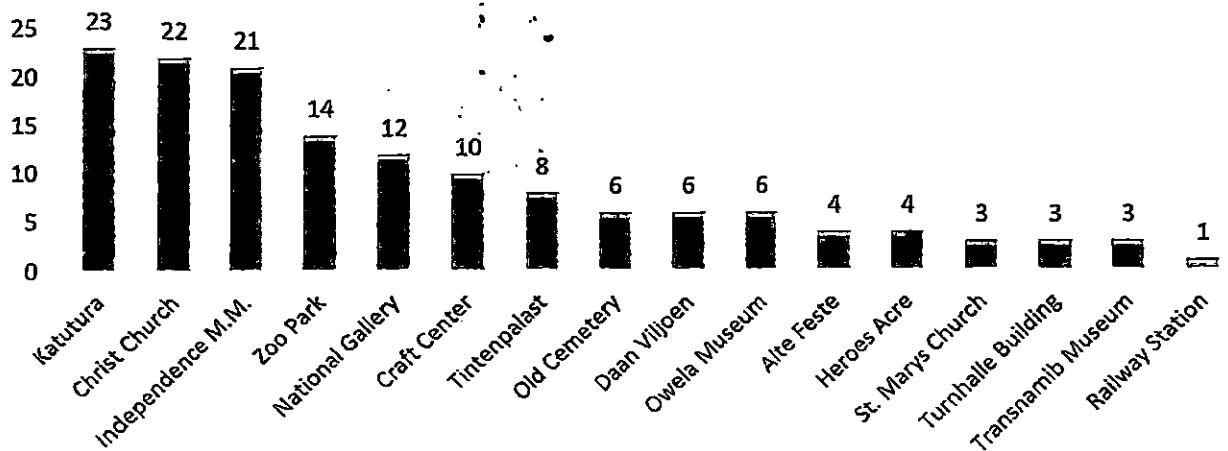
Tourist attractions visited by visitors of all nationalities



Tourist attractions visited by European visitors



Tourist attractions visited by African visitors



Question 6 and 7 – see chapter 5.3

Question 8-13

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<i>I feel safe in the City of Windhoek.</i>	1	2	3	3.98 4	5
<i>I feel satisfied with the cleanliness of the City of Windhoek.</i>	1	2	3	3.95 4	5
<i>I do not feel disturbed by the noise in the City of Windhoek.</i>	1	2	3 3.66	4	5
<i>It is easy to find my way around the city.</i>	1	2	3	3.93 4	5
<i>I am aware of the sustainability efforts the City of Windhoek is taking.</i>	1	2	2.65 3	4	5
<i>I feel overall satisfied with my visit to the destination of Windhoek.</i>	1	2	3	4 4.21	5
Total	1	2	3 3.76	4	5

V) Greenhouse Gas Emissions

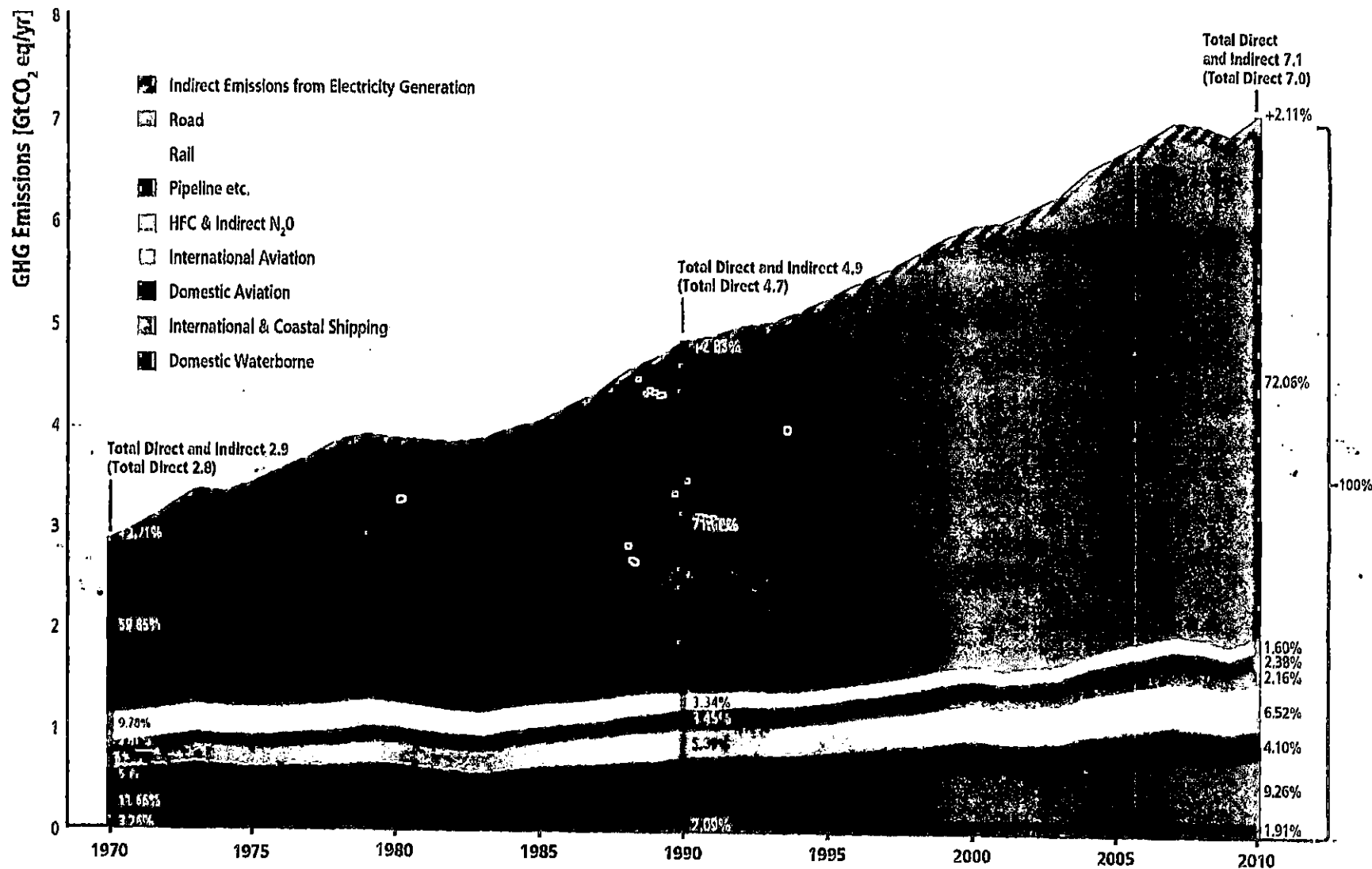


Figure 1 GHG Emission in 2014 (Source: IPCC 2014, p.603)

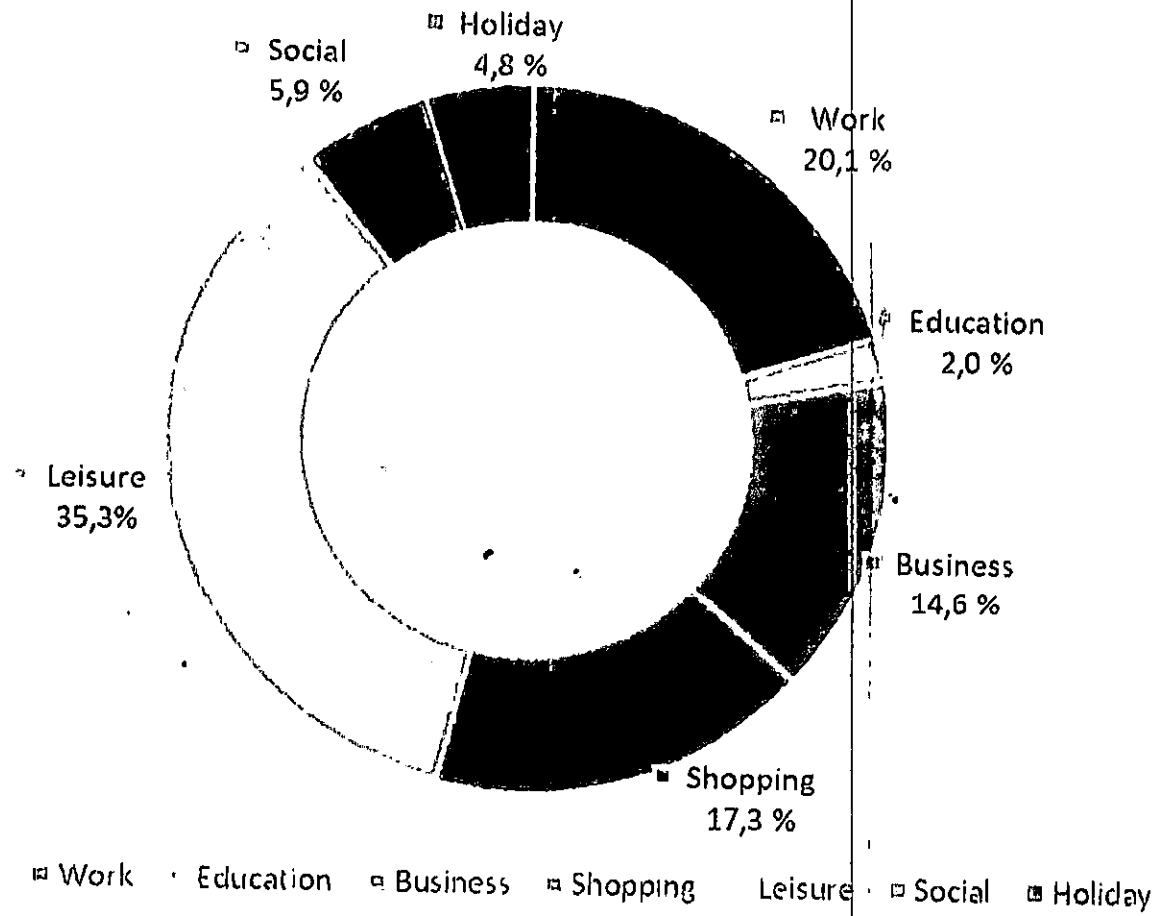


Figure 2 Motorised individual traffic by purpose in Germany in 2016 (Bundesministerium für Verkehr und digitale Infrastruktur 2019, p.225)

VII) Overview of verifiers for indicator-specific data collection

Which verifier is used to collect data on which indicator

[illegible]

Figure 3 Verifier und Indicator Matrix (Source: Own table)