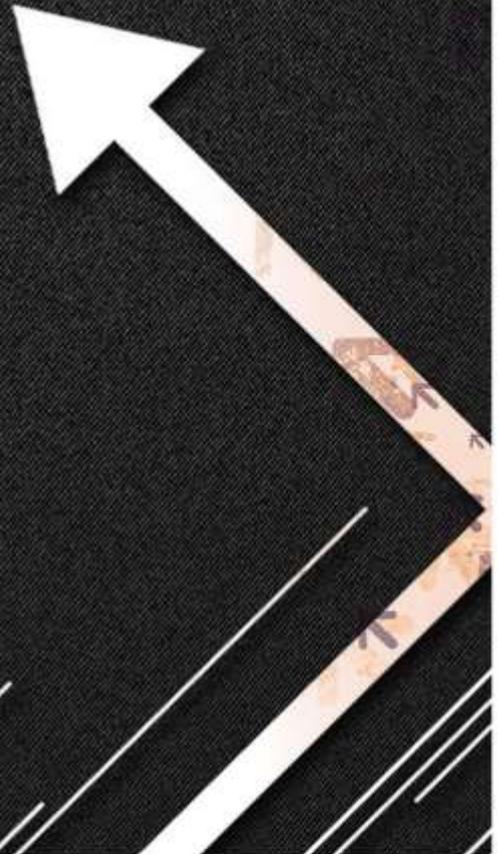


NDT POLICY WATCH QUATERLY UPDATE

October-December 2012



***INTERNATIONAL AND NATIONAL
POLICY DEVELOPMENTS***



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

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1. BACKGROUND AND INTRODUCTION

- 1.1 The National Tourism Sector Strategy (NTSS) underlines the significance to address policy gaps that exist in the tourism sector and calls for development of appropriate interventions. These interventions include conducting periodic policy reviews with a view to establish gaps and learn from international best practice.
- 1.2 The NTSS also emphasizes the importance of identifying risks that may compromise its successful implementation. This implies on-going monitoring and evaluation through policy analysis and understanding of the global environment affecting the sector in order to make necessary adjustment.
- 1.3 The above emphasis is a consequence of tourism being susceptible to various policy developments from other

sectors, in addition to possible tourism policy gaps that may emerge over time. It is therefore, important that a comprehensive analysis of the policy environment within which Tourism Sector operates is conducted on a frequent basis.

- 1.4 In light of the above, the Annual Performance Plan of the National Department of Tourism identified Quarterly Policy Watch as one of the deliverables in the 2012/13 financial year. Quarterly Policy Watch entails close analysis of policy developments across sectors which might have implications to tourism. These policy developments are compressed into a quarterly report highlighting implications and possible recommendations.

2. INTERNATIONAL DEVELOPMENTS

2.1 Moratorium on Aviation Carbon Tax by the European Union (EU)

- 2.1.1 The European Union (EU) has announced the moratorium on Aviation Carbon Tax which came into effect in January 2012. The European Union suspended the enforcement up until September 2013. The commissioner for climate change pointed out that “the decision was meant to allow the International Civil Aviation Organisation (ICAO) an opportunity to find a global solution”. However, the scheme will continue to be implemented within European Union flights. The move has been welcome by various international

organizations such as the International Air Transport Association (IATA).

- 2.1.2 The moratorium brings a welcome relief to the international airline industry which has been vehemently opposed to the unilateral introduction of aviation tax by EU. It was seen as an initiative that further escalates airline costs, which are already strained by higher oil prices. From the tourism side, the aviation carbon tax was seen as detrimental to tourism because of the likelihood of cost being transferred to

consumers, thereby affecting travel patterns.

- 2.1.3** However, as the moratorium outlined, this should not be construed as the beginning of the end of the aviation carbon tax. The EU clearly pointed out that the reprieve is meant solely to

allow ICAO to find a multilateral approach. Therefore, this presents an opportunity for the tourism industry to advance its concerns to the International Civil Aviation Organisation through appropriate multilateral bodies.

2.2. Protection of Children in Tourism

- 2.2.1** The United Nation's World Tourism Organization (UNWTO) has consistently campaigned for the protection of children in tourism. It has initiated various campaigns and established an International Task Force to Protect Children in Tourism. This in line with the Global Code of Ethics in Tourism, which affirms the Universal Declaration of Human Rights of 1948 and the Convention on the Rights of Children of 1989.

- 2.2.2** The Global Code of Ethics in Tourism emphasize the importance of human rights, in particular the rights of vulnerable groups such as children, elderly and the handicapped, etc. Further to that, the code states that "exploitation of human beings, in any form, particularly sexual, especially when applied to children, conflicts with the fundamental aims of tourism and is the negation of tourism"¹. Therefore exploitative activities should be earnestly prevented by all states concerned and penalised without concession, through legislation of both countries visited and countries of the perpetrator, even when they are carried out abroad.

- 2.2.3** The UNWTO believes that the exponential growth of tourism across the globe equally requires the global travel industry to eradicate child labour and sexual exploitation in tourism. It is of the view that the tourism industry has a moral obligation to combat child labour, sexual exploitation and trafficking of children.

- 2.2.4** In light of the campaign by the UNWTO, various international organizations across the globe have responded. Orbis Hotel group in Poland, United States' Adventure and Travel Associations (ATTA) and Dutch Tour Operators have signed codes of conduct prohibiting the exploitation of children in any form within their industries.

- 2.2.5** The situation in South Africa is not as hopeless as others may think. Some organizations have embraced the Global Code of Ethics in Tourism and launched the Child Protection Code of Conduct under the stewardship of Fair Trade in Tourism South Africa (FTTSA) and Cape Town Tourism. The Department of Tourism and Tourism Business Council of South Africa supported the idea towards the FIFA 2010 World Cup. At the time, Cape Town Tourism and FTTSA encouraged tourism businesses to join the fight

¹ Global Codes of Ethics For Tourism

against exploitation of children in Cape Town and throughout South Africa.

2.2.6 The initiative by FTTSA presents a huge opportunity for further partnerships with the tourism sector to create awareness on the Tourism Child Protection Code of Conduct. The partnerships may perhaps include encouraging service providers within the tourism value chain to sign the code. Intensifying awareness of the national code for the protection of children in tourism will assist the country in prosecuting perpetrators in tourism, regardless of their origin. It will

also assist the industry to fulfil the objectives of the Bill of Rights as contained in the South African Constitution and their responsibilities in line with the Global Code of Ethics in Tourism.

2.2.7 The creation of awareness on such a national code will prevent embarrassing events like the Durban incident next to the golden mile, where girls under the age of 16 were trafficked. The promotion of protection of children in tourism should go beyond major events and be consistently advocated throughout.

2.3. PROPOSED UNWTO CONVENTION ON THE PROTECTION OF TOURISTS AND TOURISM SERVICE PROVIDERS

2.3.1 The UNWTO is in the process of developing the Convention of Tourists and Tourism Service providers. This is meant to provide minimum standards for protection of tourists and travel organizers.

2.3.2 According to the UNWTO, This was prompted by the lack of regulations governing the rights and obligations of tourists and travel organizers as it was

evident during the volcanic crisis in Iceland

2.3.3 It is envisaged that, once the convention has been approved by the UNWTO, countries will be allowed to show their interest through their signature. Moreover, it is expected that countries would ratify their regulations if they have signed and supported the convention.

2.4. YELLOW FEVER

2.4.1 According to the World Health Organization (WHO), yellow fever is an acute viral haemorrhagic disease transmitted by infected mosquitos for which there is no cure.² The first symptoms of the disease usually

appear in the first three to six days after infection. The first phase is characterized by fever, muscle pain, headache, shivers, loss of appetite, nausea and vomiting. These normally disappear after three to four days.

2.4.2 The WHO reported that in some cases the disease enters a toxic phase where

² UNWTO Website. Visited on the 10 December 2012

fever reappears, patient developing jaundice, and in some instances bleeding and blood appearing in the vomit. The WHO pointed out those patients who enter the toxic phase die within ten to fourteen days. In light of the above, the WHO recommended vaccination as a preventative measure for travellers and people living in endemic areas. Immunisation ought to be done 10 days prior to travelling.

2.4.3 The World Health Organization is responsible for tracking infectious diseases, sound the alarm and provide technical assistance where needed. This is done through the Global Outbreak Alert and Response Network. This network has human and technical resources to quickly identify, confirm

and respond to outbreaks of international importance.

2.4.4 It is important to note that the International Health Regulations requires universal reporting of yellow fever cases within 24 hours of detection. Further to that, it is the WHO that publishes the list of countries and regions affected by yellow fever. In light of the above, it is of utmost importance that the tourism sector provides such information to travellers. This would not only ensure safety of tourists but will dispel the notion that other countries sometimes introduce yellow fever requirements unnecessarily. Further information can be obtained in the World Health Organization's Website www.who.int under Health Topics.

2.5. ORGANIZATION FOR ECONOMIC COOPERATION AND DEVELOPMENT'S (OECD) SHIFT TO DOMESTIC TOURISM

2.5.1 Currently, a number of countries under the OECD are facing economic crisis. The crisis has been moving from one country to another, to a point where regional blocks are struggling to manage it.

2.5.2 Countries like Greece, Ireland, Italy, Portugal and Spain have to contend with austerity measures and are faced with rising unemployment, which the OECD believes has a potential of affecting their international tourism activities.

2.5.3 Further to that, the OECD is of the view that any further weakening of arrivals from original markets into these countries may perpetuate their

weaknesses, thereby worsening the situation in their labour market.

2.5.4 As a result, many of the OECD countries are responding to the international economic crisis through various policy measures. Uppermost in their policy shift is the emphasis on, and promotion of, domestic tourism measures. According to OECD, this is based on the recognition that domestic tourism has the capability of supporting local employment at the same level as international tourism. The policy shift presents a unique challenge to countries that had received a large number of tourists from OECD, specifically European countries.

- 2.5.5 South Africa, which participates in the OECD as a non-member economy, had enjoyed a considerable number of visitors from the European tourists. With no end in sight in economic crisis, and the gradual shift from international tourism to domestic tourism by most European countries, the tourism sector needs to brace itself for a possible continuous decline in European tourists.
- 2.5.6 The -4.4 % decline in Quarter two as reported in the South African Tourism Report, compiled by Business Monitor International confirms this³. The accelerated implementation of the Domestic Tourism Strategy by the National Department of Tourism will assist the country in mitigating against the decline from international tourists.
- 2.5.7 The aforementioned decline perhaps signals a need for the tourism sector to intensify its focus on other potential markets from other regions which are not severely affected as some of the EU countries. This however, does not mean marketing in EU countries, which are the majority in the OECD, should be abandoned altogether.
- 2.5.8 It simply means the flow of foreign currency into the country can be maintained through diversifying marketing approaches. The growth in South African arrivals from India and China by 27% and 22% from January-November 2011 supports the need to intensify diversification.

³ South Africa Tourism Report Q2 2012: Business Monitor International

3. OTHER INTERNATIONAL NEWS

- 3.1 China has resolved to allow visitors from around forty five countries to spend three days in either Beijing or Shanghai without a visa. The waiver has been seen by analysts as a step that makes it easier for business people and tourists to spend a few days in either Beijing or Shanghai, conduct few meetings, visit a few sites and continue with their journey.⁴ Placed as the third most visited country in the world after France and USA, China's visa free stay, will according to analysts, appeal to travellers.
- 3.2 South Africa can draw some lessons from such an initiative, given the fact that the NTSS promotes initiatives meant at removing barriers to tourism growth
- 3.3 Exploring such waivers will also give meaning to the recent call made by Tourism Ministers at the World Travel Market, to resolve visa barriers.

⁴ Business day, Africa and the World section, 12 December 2012, p, 6.

4. NATIONAL POLICY AND LEGISLATIVE DEVELOPMENTS

4.1 Bills and Strategies

- 4.1.1 The National Department of Tourism has tabled the Tourism Bill of 2012 in Parliament on the 4th of December 2012. The Bill provides for the development and promotion of sustainable tourism for the benefit of South Africans and visitors. It further provides for continued existence of the South African Tourism Board, establishment of Tourism Grading Council and the regulation of tourist guides profession, etc.
- 4.1.2 Stakeholders who intend to familiarize themselves with the contents of the Bill can access it on the NDT website i.e. www.tourism.gov.za under latest publications.
- 4.1.3 The Department of Economic Development and Tourism in the Western Cape has published the Draft Western Cape Trade and Investment Promotion Amendment Bill of 2012, for general information. The Bill seeks to amend the Western Cape Investment and Trade Promotion Agency Act of 1996.
- 4.1.4 It also seeks to extend the objects, powers and functions of the Western Cape Investment and Trade Promotion Agency, as well as powers and duties of the board to include tourism promotion.
- 4.1.5 Further to that, the Bill amends the Western Cape Investment and Trade Promotion Act of 1996, to require tourism qualifications and experience in members of the board and provide for the repeal of the Western Cape Tourism Act of 2004. Any person interested in providing comments is expected to do so in writing before the 14th December 2012. The Draft Bill can be accessed in the Western Cape Department of Economic Development and Tourism website i.e. www.westerncape.gov.za under useful information.
- 4.1.6 The KwaZulu-Natal Department of Economic Development and Tourism has developed the KwaZulu-Natal Tourism Master Plan. The KZN Tourism Master Plan has also been approved by the Provincial Cabinet. The Master Plan was developed in such a way that it is in line with the National Tourism Sector Strategy.
- 4.1.7 The KZN Tourism Master Plan's objectives include increasing tourism's contribution to the GDP, growing the levels of foreign visitor arrivals in the province, growing the levels of domestic visitor arrivals and achieving significant transformation in the sector, etc.
- 4.1.8 To those who are intending to indulge in spirits whilst enjoying the game, and those intending to trade during AFCON games, the Draft AFCON 2013 Liquor Regulations have been developed by the Department of Trade and Industry. The regulations control the advertising, selling, as well as consumption of

liquor at the stadiums, fan parks, and public viewing areas.

- 4.1.9 Special liquor licenses will be issued for trading in the aforementioned areas. The Provincial Liquor Boards are responsible for issuing special liquor license upon receiving applications. Existing liquor license holders will also be expected to apply

for special liquor license if they intend to trade in stadiums, fan parks, and public viewing areas. Interested persons are recommended to submit their written comments no later than 19 December 2012. This information is also critical to soccer fans across the African continent and beyond, who will be visiting our shores for the AFCON.

4.2 Carbon tax policy paper by National Treasury

- 4.2.1 The National Treasury has developed the carbon tax policy paper, which seeks to reduce greenhouse gas emissions and facilitate the transition to the green economy. The carbon tax is proposed on amongst other things fuel and energy. This will definitely have an impact on the tourism sector which heavily relies on fuel for transporting tourists as well as energy for the running of establishments.

- 4.2.2 Carbon tax on fuel may also result in an increase in aviation and car rental fees, and this in turn will be passed to

consumers. In light of the proposed carbon taxes, the tourism sector ought to note the policy paper and its possible unintended consequences to tourism.

- 4.2.3 This includes collectively exploring alternative solutions to the problem of greenhouse gas emissions. The policy paper is now in the process of being approved by the Cabinet, after which implementation shall commence.

4.3 South African National Standards: SANS (1162)

- 4.3.1 The implementation of a National Responsible Tourism Standard ensures the relevant application and practice of responsible tourism criteria. However South Africa did not have a single, unified National Responsible Tourism Standard and Accreditation System for the tourism sector. The NDT spearheaded the process of developing a National Responsible Tourism standard in partnership with

industry role-players over a period of three years.

- 4.3.2 In September 2011, the Minister of Tourism, the Honourable Marthinus van Schalkwyk, launched the new, South African National Standard (SANS 1162) for tourism. This was published by the South African Bureau of Standards (SABS) and endorsed by the tourism industry. **SANS 1162**

provides a common framework for Responsible Tourism implementation.

It will also guide the accreditation of Responsible Tourism certification systems operating within South Africa through the South African National Accreditation System (SANAS) from 2012 onwards.

- 4.3.3 During Indaba 2012, the Minister of Tourism, the Honourable Marthinus van Schalkwyk announced the opening of the accreditation system. Therefore certification bodies can apply to be accredited by SANAS (South African National Accreditation System) if they demonstrate competence in certifying tourism businesses for compliance with SANS 1162. In order to ensure common understanding of the certification process, the NDT in partnership with tourism stakeholders have developed an interpretation manual to ensure that all role-players have the same understanding. The

manual is currently being processed by the South African Bureau of Standards to ensure that it meet the requirements of a national standard to be utilised in conjunction with SANS 1162.

- 4.3.4 The NDT and tourism stakeholders are also in the process of developing a self-assessment tool that will assist tourism businesses to measure their progress towards meeting the requirements of SANS 1162.
- 4.3.5 A copy of the South African National Standard can be sourced from the South African Bureau of Standard and their contact number is 012 428 7911 and the website is www.sabs.co.za
- 4.3.6 Tourism role-players wishing to undertake certification utilising the SANS 1162 should contact the South African National Accreditation System (SANAS) on the following contact details: Telephone Number: 012 – 394 8888.

5. OTHER NATIONAL DEVELOPMENTS

5.1. Census 2011

- 5.1.1 Statistics South Africa recently released 2011 census, which is the third census since the first democratic elections. The results are not only meant to provide clarity on population figures, but are also meant to assist policy makers with planning, and assist with re-prioritization. As a department tasked with tourism policy development, the National Department of Tourism ought to dissect the census

results. This includes grappling with the question: *what does census 2011 means for the National Department of Tourism?*

- 5.1.2 To answer the above question, this section will focus on the results outlined in the report and decode the meaning of these to tourism. The report pointed out that the country's population was at 40 583 573 million in 1996, 44 819 778 million in 2001 and

51 770 560 million in 2011.⁵ Further to that, the 2011 population of age groups from 20-24 years was at 5 374 542 million, 25-29 years at 5 059 317, whilst the population of age group 30-34 was at 4 029 010 million. On top of that, 769 291 students are in various colleges and universities/technikons.

5.1.3 These aforementioned numbers confirms the long held view that South Africa has a significant number of young people. This therefore calls for the intensification of youth empowerment initiatives. Bursaries, internships, and training programmes by the NDT, are a step in the right direction. Investing in the human capacity that will contribute to the tourism sector and the public sector broadly is critical, given the economic status recently accorded to tourism and the skills needed.

5.1.4 Sadly, the 2011 census recorded 29.8 percent of unemployment using the official definition and 40 percent unemployment when using expanded definition. Of the 29.8 percent unemployed recorded, 30.5 percent are black, 21.0 percent are coloured, 9.7% are Indian/Asian, and 5.0 percent are white. Within this 28.9 percent pool of the unemployed, 41.2 percent are black women, 23.8 percent are coloured women, 14.5 percent are Indian/Asian women, and 6.9 percent are white women. The above percentages points to two critical issues.

5.1.5 Firstly, it raises a serious concern where close to half of the population is

unemployed. This is a recipe for social unrest, crime coupled with resentment for tourists, a situation which the tourism industry cannot afford. Secondly, it highlights the need for all sectors, including tourism, to address the racial and gender aspect of unemployment by focusing on women and the previously disadvantaged. Thirdly, it signals that huge chunks of population are without disposable income, which may impede efforts to accelerate domestic tourism.

5.1.6 With regards to labour absorption rate by population group and sex, 40.8 percent black male, 52.0 percent coloured male, 64.9 percent Indian/Asian male and 75.7 percent white male forms part of South African labour. Meanwhile 28.8 black female, 42.3 coloured female, 43.9 Indian/Asian female and 62.5 white female forms part of labour. These numbers clearly indicate the need for intense transformation across the South African economy. The implementation and monitoring of the Tourism BEE Charter ought to be pursued earnestly.

5.1.7 It is important to note that 9 364 518 million households do not have access to internet. This means 64.8 percent of households do not have access to internet. Interestingly, 10 761 949 million households have access to television, whilst 9 749 897 have access to radio. Looking at this from the Domestic Tourism marketing perspective, it would perhaps be appropriate to focus on television and radio as a prominent mode of promoting domestic tourism. This

⁵ Statistics South Africa: 2011 Census Results.

makes sense given the fact that more than half of households do not have access to internet.

- 5.1.8** Lastly, it is important to re-emphasize the issue of rural development. The 2011 census have shown that more people migrate to industrialized provinces like Gauteng and Western Cape. This could be attributed to worsening levels of poverty in rural areas and perceived lack of

opportunities. Increase in population numbers has its advantages. However, in the climate of unemployment and limited resources, it can stretch resources and create other unintended consequences. Thus the development of the rural tourism strategy needs to be applauded and at the same time earnestly implemented.

5.2. Aviation developments

- 5.2.1** Another low-cost airline has collapsed. Some analysts and commentators believe that the subsidization of SAA is linked to the collapse of low-cost airlines that the country has experienced.

- 5.2.2** Conversely, others are of the view that the subsidization of SAA is critical for the countries' strategic priorities. In other words, some airlines might find other destinations non-viable whilst these might be the destinations where the country has vested strategic relations e.g. BRICs countries.

- 5.2.3** Despite the arguments for or against subsidization, the collapse of low-cost airlines and the lack of coherent policy response to arrest such, is not in the best interest of tourism. The

continuous closure of low-cost airlines will have negative impact to domestic tourism. This includes fewer airlift and increase in prices as a result of lack of competition.

- 5.2.4** Apart from that, it goes against the spirit of liberalizing the skies as well as NTSS's call for the improvement of domestic airlift. Most importantly, it contributes to the problem of unemployment, where thousands of employees in these low-cost airlines are rendered redundant.

- 5.2.5** Therefore, the tourism sector ought to perhaps initiate a discussion around the continued closure of these low-cost airlines and its possible impact to tourism.

5.3 Tourist guiding

- 5.3.1** The National Department of Tourism is in the process of developing the Memorandum of Understanding to be

signed with Road Transport Management Corporation (RMTTC). The agency will assist with the enforcement

of tourism legislation in relation to tourist guiding, with a view to root out illegal guiding.

5.3.2 Currently, the NDT embarked on a joint venture with the RMTC to form road blocks and carry out inspections to assess the level of illegal guiding. These inspections were carried out in Limpopo around Phalaborwa and Thulamela.

5.3.3 Besides that, the Tourist Guiding Directorate will be hosting the International Tourist Guide's day on the

20th and 21st February 2013. Amongst other things, this is meant to promote tourist guiding in the country.

5.3.4 The event will include presentations from the public and private sector that will capacitate tourist guides. With regards to future endeavours, the Tourist Guide Directorate is working on a cross-border tourists guiding feasibility study. This is meant to research the possibility of harmonization of tourists guiding practices in Southern African Development Community (SADC).

5.4 Game reserves and lodges summit

5.4.1 On the 22nd and 23rd of November 2012, the Game Reserves and Lodges Summit was held at the Kruger National Park Skukuza Conference. The National Department of Tourism attended the summit as an observer.

5.4.2 The summit deliberated on various issues such as the need for labour peace and stability within the game reserves and lodges. This was in light of the social unrest in other sectors such as mining and agriculture, as well as the recent unrests in the Kruger National Park earlier this year.

5.4.3 Further to that, the summit deliberated on the establishment of the bargaining

council for game reserves and lodges sector. Such a discussion provoked divergent views, with participants arguing for and against the idea. However, the summit resolved that the matter be further investigated.

5.4.4 Lastly, the summit resolved on various issues. These amongst others include implementation of genuine corporate investment programmes, commitment to transformation, ensuring community participation and strengthening participation between employer and employee, etc. The proactive discussion by this sector needs to be lauded and encouraged given the unpredictability of social unrests.

6. ADMINISTRATIVE MATTERS

6.1 The National Energy Regulator of South Africa (NERSA) has approved Eskom annual average price increases of 16% and tariff rates for 2012/2013

on 9 March 2013. Looking at increase per tariff category, the urban tariff category increase is at 16.73 %, rural tariff category at 15.74%, local tariff

category 16.09 %, and residential tariff category at 11.08 % category. Business organizations such as BUSA expressed concern on electricity price shocks⁶, which might have adverse economic impacts. Besides that, this will have an impact to tourism establishments, which relies heavily on electricity to deliver pleasant experiences. For more information on electricity hikes, visit Eskom website www.eskom.co.za under customer care click tariffs and charges.

6.2 With regards to bylaws, a quick glance of major metros across the country reveals that there aren't new bylaws that may have implications to tourism. Interestingly though, the Nelson Mandela Bay Municipality and EThekweni Municipality have bylaws that specifically relates to tourism.

6.3 The EThekweni Municipality has Accommodation Establishment Bylaws⁷. It regulates persons involved in the business of supplying accommodation. Further to that, it prohibits persons to supply accommodation unless there is a valid registration certificate approved by the council and outlines the process of registration. This will enhance the quality of tourism establishments and discourage the delivery of substandard accommodation establishments.

6.4 Nelson Mandela Bay Municipality has a draft Arts and Culture Heritage Resources and Cultural Institutions Bylaws. The Bylaws seeks to regulate admission to heritage and cultural

facility, entrance fees, number of visitors, camping in heritage sites and prohibited behaviour. Further to that, it outlines penalties to apply for transgression in line with the National Heritage Resources Act of 1999. Such regulation will ensure proper preservation of heritage resources and limit cultural and heritage exploitation.

6.5 For more details, information can be obtained at www.durban.gov.za under resource centre and www.nelsonmandelabay.gov.za under council tab.

⁶ www.fin24.com visited on the 10th December 2012

⁷

For comments and inputs, kindly forward them to Senzo Nkala at snkala@tourism.gov.za or 012 444 6303

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