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## Emergent planning for South Africa's blue economy: Evidence from coastal and marine tourism

### Abstract

Ocean-based industries are in focus in terms of expanding debates and planning around the blue economy. Against this backdrop the objective in this paper is to examine contemporary directions in South Africa concerning planning for the blue economy as a whole and more specifically for the sector of coastal and marine tourism. Using documentary analysis of official planning and strategic documents, South Africa's blue economy strategy, which is titled 'Operation Phakisa', is unpacked and critiqued. Attention shifts to examine current directions and challenges of unfolding planning for the expanded development of coastal and marine tourism in South Africa. It is shown that uneven spatial development characterises the existing coastal tourism economy. Arguably, tourism planning is linked to Operation Phakisa which is being challenged for a number of shortcomings, most importantly for prioritising investment attraction and economic growth stimulation over issues about the conservation of maritime resources.

**Keywords:** blue economy, special planning, Operation Phakisa, coastal and marine tourism, South Africa

### 1 Introduction

Ocean-based industries are acknowledged as making up a substantial contribution of world economic output and employment (Orams & Lück, 2014; Dwyer, 2018). The concept of the oceans economy is defined by Walker (2018: 6) as that "portion of the economy that relies on the ocean as an input to the production process or which by virtue of geographic location, takes place on or under the ocean". Among several scholars Dwyer (2018) identifies the global significance of the ocean economy as the sum of the economic activities of ocean-based industries, and the assets, goods and services of marine ecosystems. Essentially, this ocean economy is a cluster of interconnected industries that incorporates a mix of established as well as newer activities. These include offshore oil gas exploration, shipping, shipbuilding and marine equipment, fisheries and fish processing, aquaculture, as well as coastal and marine tourism. Internationally, there is an emerging consensus that attempts to exploit ocean resources must be counterbalanced by the protection of vulnerable ecosystems and against harmful, unprincipled or illegal practices. This principle is embedded globally in the United Nations Sustainable Development Goal 14 which commits member states to conserve and sustainably use the oceans, seas and maritime resources for purposes of development. Overall, this thinking about the sustainable economic use of ocean resources coalesces around the term 'blue economy' (Dwyer, 2017; Walker, 2018). Although little clear agreement exists about the definition of the blue economy, in policy terms it is argued that "at the core of the concept is the awareness of maritime resources and their capacity to contribute to poverty reduction, human welfare and economic opportunity" (Doyle, 2018: 1). Furthermore, it is stressed that ocean resources always should be used in a sustainable, stable and inclusive manner (Masie & Bond, 2018).

Blue economy debates and planning are of special significance in the global South. In Africa as well as the broader arc of countries adjoining the Indian Ocean there is considerable contemporary policy interest in the development of the oceans economy. Africa has 38 coastal and island states, 13 million sq. km of collective economic zones and a 47 000 km coastline which offers considerable potential for individual African countries, and for the continent as a whole, to develop those sectors typically associated with the blue economy (Engel, 2018). Benkenstein (2015: 2) records that, despite a wealth of potential assets, until recently the continent's institutions and policy-makers have suffered a "high degree of *sea-blindness*". During 2014, however, the African Union in recognition of the ocean's economic potential, extensive coastline and opportunities surrounding maritime resources, endorsed the 2050 Africa Integrated Maritime Strategy which is a long-term vision for the development of Africa's blue economy (Engel, 2018; Rustomjee, 2018).

A major awakening to the blue economy also has occurred across the 21 states of the Indian Ocean Rim Association (IORA; Colgan, 2017; Attri, 2017, 2018). Blue economy debates are especially relevant for this region as in geopolitical terms the Indian Ocean Rim shifts away "from being identified as the *Ocean of the South* to the *Ocean of the Centre*, and the *Ocean of the Future*" (Doyle, 2018: 1). The Jakarta Declaration on the Blue Economy, issued in May 2017, provides a total of 26 recommendations as well as principles for developing and applying blue economy approaches to sustainable development and enhancement of socio-economic benefits, particularly for coastal communities in the IORA region (Indian Ocean Rim Association, 2017). However, even prior to the Jakarta declaration it must be acknowledged that several IORA states engaged in developing aspects of the blue economy, albeit with varying levels of success and commitment (Llewellyn et al., 2016; Doyle, 2018). What is new is the greater policy acknowledgement of the importance and potential of the blue economy among certain IORA states (Rahman, 2015; Hussain et al., 2018). Illustratively, Mitra (2017: 1) records that the blue economy "presents a unique and unprecedented opportunity for India to reframe its approach in managing the ocean".

Although offshore oil and gas exploitation is the leading sector of ocean industries (contributing one-third of total value-added), the second most significant sector is that of the economy of coastal and marine tourism (Dwyer, 2018). The definition of coastal tourism includes the full array of tourism leisure and recreational activities that occur in coastal zones and offshore coastal waters; marine tourism is closely related to coastal tourism but includes also such activities in the marine environment as scuba diving, fishing, the observing of marine mammals and so on (Hall, 2001; Orams, 2002). As a whole coastal and marine tourism is viewed as "one of the fastest growing areas of contemporary tourism" (Hall, 2001: 601). For blue economy debates coastal and marine tourism represents a critical 'new frontier'. Now, tourism is identified as part of the diversification strategies of several African states as well as source of valuable income for coastal communities (Leijzer & Denman, 2014; Rogerson & Rogerson, 2018).

Until as late as the 1990s Miller (1993: 182-183) argues that tourism "in the ocean and shoreline settings received far less attention than, for example, problems linked to coastal zone management, living marine resources, offshore oil and gas exploration, ocean shipping, port management and wetlands restoration". As an academic focus of enquiry Orams and Lück (2014) confirm that major research initiatives about coastal and marine tourism began around 1990. Currently, international scholarship on policy and planning for coastal and marine tourism is rising in significance (Hall, 2001; Orams, 2002; Gössling et al., 2018). Among highly influential scholarly contributions must be noted those on opportunities and

problems in coastal tourism zone management (Miller & Auyong, 1991; Lee, 2010), the imperative for integrated approaches to coastal and marine management (Wonga, 1998; Hall, 2001), a cluster of studies on policy implications of global climate change for coastal tourism (Moreno & Amelung, 2009; Moreno & Becken, 2009), effective governance systems (Caffyn & Jobbins, 2003; Leijzer & Denman, 2014), marine spatial planning (Papageorgiou, 2016) and, sustainability issues (Garrod & Gössling, 2008; Gössling et al. 2018). The limited existing scholarship around coastal and marine tourism in South Africa points to both opportunities for its expansion for job creation as well as addressing poverty but also to several critical structural challenges around coastal area management, governance, sustainability and the ramifications of climate change (Glavovic, 2006; Glavovic & Boonzeier, 2007; Myles, 2013; Van Wyk, 2015; University of KwaZulu-Natal, 2017; Giddy & Rogerson, 2018; Ndlovu et al., 2018; Pandey & Rogerson, 2018; Potgieter, 2018).

It is against a backdrop of the international importance of enhanced planning for coastal and marine tourism that the objective in this article is to analyse contemporary directions in South Africa concerning planning for blue economy as a whole and specifically for the sector of coastal and marine tourism. Arguably, Rustomjee (2018) isolates South Africa – along with Mauritius and Seychelles – as the leading countries in Africa in terms of policy development and implementation of national blue economy strategies. The following discussion reviews unfolding policy developments on these issues in three further sections of material. First, using documentary analysis of official planning and strategic documents, an overview is given of South Africa's blue economy strategy which is entitled 'Operation Phakisa' (meaning 'hurry up' in Sesotho dialect). The next section highlights aspects of an emerging trenchant critique of Operation Phakisa's methodology, its underpinnings and current planning directions. The final section narrows to focus on coastal and marine tourism and dissects current directions and challenges of planning for its expanded development in South Africa by analysing national tourism planning documents. In addition, the results are presented concerning analysis of the spatial distribution of coastal tourism. The research uses local level data extracted from the IHS Global Insight data base which provides information disaggregated at the local and district municipal scale for coastal destination total trips, purpose and origin of trip as well as estimates of total spend (Rogerson, 2018).

## **2 The blue economy and Operation Phakisa**

South Africa has a long maritime history, a coastline of 3924 kilometres and with access to an Exclusive Economic Zone of oceans that covers 1.54 million square kilometres (Potgieter, 2018). It is stated that the Operation Phakisa initiative (with its focus on the oceans economy) originated from a state visit made by former President Zuma to Malaysia in August 2013 (Department of Environmental Affairs, 2016a, 2017). During that visit the President was introduced to the so-termed 'Big Fast Results' methodology which had been applied in Malaysia in a highly effective manner to achieve significant government and economic transformation within a short period of time in the areas of poverty, crime and unemployment. Engel et al. (2018) consider that the Big Fast Methodology evolved as a response to the new public management approach developed in the United Kingdom and other Commonwealth countries during the 1980s. With the assistance of the Malaysian government the Big Fast Results methodology was adapted to South Africa and restyled as Operation Phakisa (Akhilwanya, 2015).

National government in South Africa stresses that this is a results-driven methodology which draws together key stakeholders from the public and private sector, universities and civil society organisations in collaborative sessions called ‘laboratories’ in order to design strategic interventions for particular sectors (Akhawaya, 2015). In terms of economic development for South Africa the critical application of this methodology has been to the country’s ocean economy. This focus on the ocean economy is viewed more broadly as part of and closely aligned to South Africa’s 2030 National Development Plan (Rustomjee, 2018; Satgar, 2018). The actual planning phase of Operation Phakisa for the oceans economy took place in mid-2014 (Invest South Africa, 2016: 2). On 15 October 2014 the launch of this initiative took place (Republic of South Africa, 2015a). According to October (2015) over a period of 6 weeks a variety of stakeholders from the public and private sectors had gathered together to develop, plan and fast-track a suite of integrated programmes in order to unlock delivery in the country’s oceans or blue economy.

The potential of tapping the oceans economy as a basis for economic and social development is evidenced by the observation that South Africa has more ocean space, including its exclusive economic zone, than land area (Republic of South Africa, 2014; Van Wyk, 2015). An audit of the socioeconomic value of goods and services provided by the ocean recently produced by the World Wild Life Fund, South Africa (2016) underscores the direct potential for asset development for fishing, aquaculture, coastal development, marine mining, oil and gas as well as tourism. In his 2016 State of the Nation address (former) President Zuma identified the significance of the oceans economy for boosting economic growth and job creation as well as for addressing the triple scourges of poverty, inequality and unemployment (Department of Environmental Affairs, 2016a). As South Africa is characterised by major imbalances in terms of spatial development Operation Phakisa is viewed as an initiative which will also impact spatial development imbalances as it will be used as a lever to assist development of rural economies through a number of planned interventions (Department of Environmental Affairs, 2016b).

Currently, the oceans economy initiative is in implementation phase with government claiming that it has unlocked investments amounting to US \$ 1.1 billion and as a result 4500 jobs have been created (Invest South Africa, 2016: 2). Long term projections are highly optimistic that by 2033 South Africa’s oceans economy could contribute up to R177 billion to GDP with the creation of one million jobs. The estimate of 1 million jobs should be compared to approximations of 316 000 jobs existing in 2010. In the immediate short term, once again much is expected from the oceans economy initiative; by 2019 it is projected that the oceans economy initiative will expand the national GDP by R20 million and with the accompanying establishment of 22 000 direct new jobs (Department of Environmental Affairs, 2016a).

At the core of these optimistic economic projections is the ongoing implementation of Operation Phakisa to unlock the economic potential of the country’s ocean economy through six ‘focus areas’ in which at least 47 detailed initiatives are at various stages of roll out (Republic of South Africa, 2015a; Department of Environmental Affairs, 2016a; Republic of South Africa, 2016a, 2016b). The six ‘focus’ or ‘priority growth areas’ are to be supported by two enablers, namely (1) expansion of skills and capacity building under the responsibility of South Africa’s International Maritime Institute and (2) research, technology and innovation with the country’s Department of Science and Technology as the key driver (Department of Environmental Affairs, 2016a; Republic of South Africa, 2016a). The priority growth areas are as follows: (1) marine transport and manufacturing, (2) offshore oil and gas exploration,

(3) aquaculture, (4) marine protection services and governance, (5) small harbours, and (6) coastal and marine tourism. In terms of the evolution of planning for Operation Phakisa the four initial focus areas were maritime transport and manufacturing; offshore oil and gas exploration, aquaculture; and, marine protection services and governance. Small harbours as well as coastal and marine tourism were later additions (Potgieter, 2018). A brief description of each of these six focus areas of South Africa's blue economy initiative now follows.

The marine transport and manufacturing focus essentially is about maximising potential around South Africa's nine major ports and enhancing port infrastructure to unlock potential opportunities around the growth of cargo handling, sea and coastal shipping and supporting transport/logistic activities including storage and warehousing (Department of Environmental Affairs, 2016a). Against this backdrop, a variety of initiatives are taking place including new port infrastructure (at Saldanha Bay, Richards Bay and East London) and improvement of ship repair facilities and dock expansion which is occurring at several commercial ports (Republic of South Africa, 2016a). In terms of manufacturing there is much attention to support for growing a competitive ship and boat building sector both in respect of commercial and military customers. Further manufacturing possibilities may arise around marine and subsea engineering and fabrication (Invest South Africa, 2016: 13). Strengthening of local supply chains allied to these maritime manufacturing activities is an essential additional planning focus (Invest South Africa, 2016).

Offshore oil and gas exploration is viewed as a second priority growth area in the Oceans Economy initiative. Much uncertainty surrounds the extent of South Africa's possible resources with one government document citing a potential for around 9 billion barrels of oil and around 60 tcf. of offshore gas (Republic of South Africa, 2016a: 20). Overall the goal is "to create an environment that promotes exploration while simultaneously maximising the benefits for South Africa" (Republic of South Africa, 2016a: 20). The shaping of an appropriate enabling environment for exploration of oil and gas wells is projected both to increase the number of oil wells drilled while simultaneously maximising the country's value capture (Department of Environmental Affairs, 2016a). Among an array of initiatives – ongoing and planned – are the development of a phased pipeline network, issuance of exploration licences, the launch of the South African Marine Research and Exploration Forum and skills development. The planning and projects around oil and gas exploration is projected to result in an expansion of 130 000 jobs and add \$2.2 billion to annual GDP as well as reducing South Africa's dependence on oil and gas imports (Department of Environmental Affairs, 2016a).

A third focus area in the Oceans Economy is the further development of aquaculture which is currently viewed as a young undeveloped industry with a low scale of production (Republic of South Africa, 2016a: 32). The best estimates are that aquaculture contributes only 0.8% of total fish and fish products and has approximately 2800 jobs with 50 percent of aquaculture farms located in Western Cape province. Promotion of the aquaculture sector is seen as having several advantages, *inter alia*, satisfying local demand for fish products, contributing to food and nutritional security, creating sustainable job opportunities, offering opportunities for small, medium and micro-enterprise development as well as stimulating rural local economic development options. Nine new aquaculture projects have been launched with others in a project pipeline. Overall, according to the Department of Environmental Affairs (2016a) these initiatives are geared to increase the value contribution of all segments across the aquaculture value chain. The specific focus is upon high value fast growing species,

labour intensive sectors, and supporting a transformation agenda to include the involvement of Black entrepreneurs.

Marine protection services and governance is a critical focus area in respect of the long-term sustainability of blue economy initiatives in South Africa. The challenge of developing effective governance is starkly clear from the fact that South Africa is responsible for managing an oceans space greater than the country's land territory and should its extended continental shelf claim be successful there would occur a doubling in size of South Africa's ocean geography (Van Wyk, 2015). Issues around developing an institutional framework to manage multiple users (such as mining, shipping, fisheries etc) of the same ocean space, ocean protection, marine spatial planning and the establishment of Marine Protected Areas are vital for a sustainable ocean economy (Walker, 2018). The immediate goal is to develop an incremental and integrated approach to the planning, monitoring and execution of ocean governance and its enforcement in future (Department of Environmental Affairs, 2016a).

Improvement in infrastructure and economic opportunities that surround South Africa's network of small harbours is a fifth focus area and seen as critical support for rural development and small town revitalisation which are essential to address spatially uneven development in the country (Rogerson and Nel, 2016). The essential task is to "energise the growth of small harbours towards an inclusive small harbours-focused ocean economy" (Republic of South Africa, 2016a: 71). This vision is founded on the acknowledgement of clear opportunities for leveraging small harbours in order to unlock local economic and social potential (Republic of South Africa, 2015b). Among new opportunities opened up by the redevelopment and improvement of small harbours are those linked to fishing and the empowerment of coastal communities for enterprise development (Republic of South Africa, 2016a: 77). In addition to existing small harbours the initiative includes also the proclamation and development of three new small harbours variously in Northern Cape (at Boegoebaai), KwaZulu-Natal (at Hibberdene) and Eastern Cape (at Port St Johns) provinces. From estimates provided by the Department of Environmental Affairs (2016a) the cluster of small harbour improvement initiatives potentially could create 12 000 new jobs and contribute R6 billion to GGP by 2019.

The final – and currently least advanced set of initiatives – relate to expanding opportunities around marine and coastal tourism in South Africa. It is significant that the country's tourism policy historically has accorded little attention to coastal and marine tourism. This oversight has prompted certain observers to speak of coastal and marine tourism development as a missed opportunity for the tourism economy (Saayman, 2014). Despite having the assets of a number of spectacular beaches South Africa has not developed the type of mass sea-sun-and sand international tourism resorts that is represented for example by Cancun in Mexico or Sharm El Sheikh in Egypt. The major current development benefits of coastal and marine tourism accrue to the leading city tourism destinations of Cape Town and Durban with well-developed infrastructures (Rogerson & Rogerson, 2014, 2017). It is argued that other coastal areas have not benefited as much because of lack of basic and tourism infrastructure. The emerging focus area around coastal and marine tourism is geared to improvement of coastal infrastructure for tourism and also to spread the benefits away from the existing traditional ('business as usual') coastal tourism hubs (Department of Environmental Affairs, 2016a). As a whole it is considered that South Africa's long coast and pristine coastal environments offer a number of untapped opportunities for growing the tourism base around coastal and marine tourism and thereby boosting local economic development opportunities. For this to take-off

in a meaningful way it is stressed that what is needed is the innovation of the product base which can be energised by infrastructural improvements.

### 3 Operation Phakisa under critique

Five years after its conceptualisation a roll out of implementation initiatives is in progress around South Africa's blue economy initiative for maximising benefits from the country's ocean resources. Progress is more advanced in some focus areas, such as marine transport, than in others, most notably coastal and marine tourism. Arguably, because of the recent nature of these initiatives a case might be made that the jury be still out on the long-term prospects for Operation Phakisa and South African blue economy planning. This said, a number of critical voices already have been raised about the planning approach as well as the current directions pursued by Operation Phakisa. These concerns are summarised here.

Engel (2018) considers that Operation Phakisa constitutes a method for planning developmental state interventions as well as a set of concrete activities targeted to boost the country's economy. Emphasis is upon planning the ocean space that has been styled, perhaps euphemistically, as South Africa's 'tenth province' (Van Wyk, 2015). Several aspects of the planning methodology used in Operation Phakisa have attracted criticism. The actual planning process involved more than 650 officials and so-termed experts who brainstormed on the commodification of South Africa's ocean resources Masie and Bond (2018: 320) reflect that the near two-month planning process "was a helter-skelter, non-consultative, elite navel-gazing and ultimately unrealistic exercise, devoid of awareness of the capitalist crisis bearing down on South Africa's two oceans". Potgieter (2018: 51) points out the focus is primarily around economic gain rather than the ocean's health. Indeed, Masie and Bond (2018) maintain that the gathered cohort of officials and 'experts' overlooked or were blind to the broader crises evident in the political economy of oil and shipping which reduce the prospects of major opportunities for South Africa.

From a political economy perspective Satgar (2018: 24) sees the planning of the blue or ocean economy in South Africa as a scramble for "a new spatial fix for capital accumulation" which is taking place in a wider context of growing 'resource nationalism'. The envisaged big and fast results from Operation Phakisa are underpinned by a methodology "that evangelises growth and foreign direct investment" (Satgar, 2018: 24). At the heart of planning is "the commodification of ecology" and the extension of planning around what Fine and Rustomjee (1996) call South Africa's 'mineral-energy complex'. This extension is now to include offshore extraction of oil, gas and other minerals and is allied to massive port infrastructure investments which are designed "to boost the outward movement of commodities, like coal and increase massive imports" (Satgar, 2018: 25). In scathing commentary, Satgar (2018: 25) asserts that this "drumbeat, fastened to a fast-track methodology, has undermined the efficiency of environmental impact assessments, prompted deregulatory thrusts in key legislation and failed to appreciate serious (environmental) risks". Arguably, the numerous environmental costs of South Africa's blue economy strategy have been either downplayed or simply ignored. Moreover, as Masie and Bond (2018) point out, the project's "overhyped GDP-led evaluation of the ocean's potential did not sufficiently balance short-term economic and political gains – which are mainly grabbed by multinationals corporations (in oil and shipping), political oligarchs and well-connected entrepreneurs – against Phakisa's massive eco-social destruction".

Certain negative issues already have already emerged and must be noted. It is observed that some of the major growth and job creation roadblocks have not so far been unblocked. In some cases engagement of stakeholders has lost momentum, effectiveness of institutional arrangements is uneven and, as a consequence, “outcomes are still far away from 2033 aspirations” (Republic of South Africa, 2015a: 5). Overall, in critical vein, Masie and Bond (2018:315) speak of the big fast methodology as characterised “in reality, by *small, slow failures* in planning and implementation, with miserable overall outcomes for the economy, polity, society and ecology”. In particular, they write from a political economy perspective that whilst the scale of planned projects are impressive “as is the case with so many of South Africa’s hastily assembled mega projects, the underlying imperatives are bedevilled by capital’s overaccumulation crisis and accelerating climate change” (Masie & Bond, 2018: 325).

#### 4 New directions for planning coastal and marine tourism

Coastal tourism is an established phenomenon in South Africa with a history that dates back to the late 19<sup>th</sup> century (Bickford-Smith, 2009). Although the city of Cape Town was an early focus for international tourists arriving by sea voyage from Europe, the major expansion of coastal tourism in South Africa was linked to the growth of domestic tourism (particularly from the 1930s) which itself was prompted by improved rail infrastructure linkages and the subsequent growth of automobilities (Rogerson, 2015).

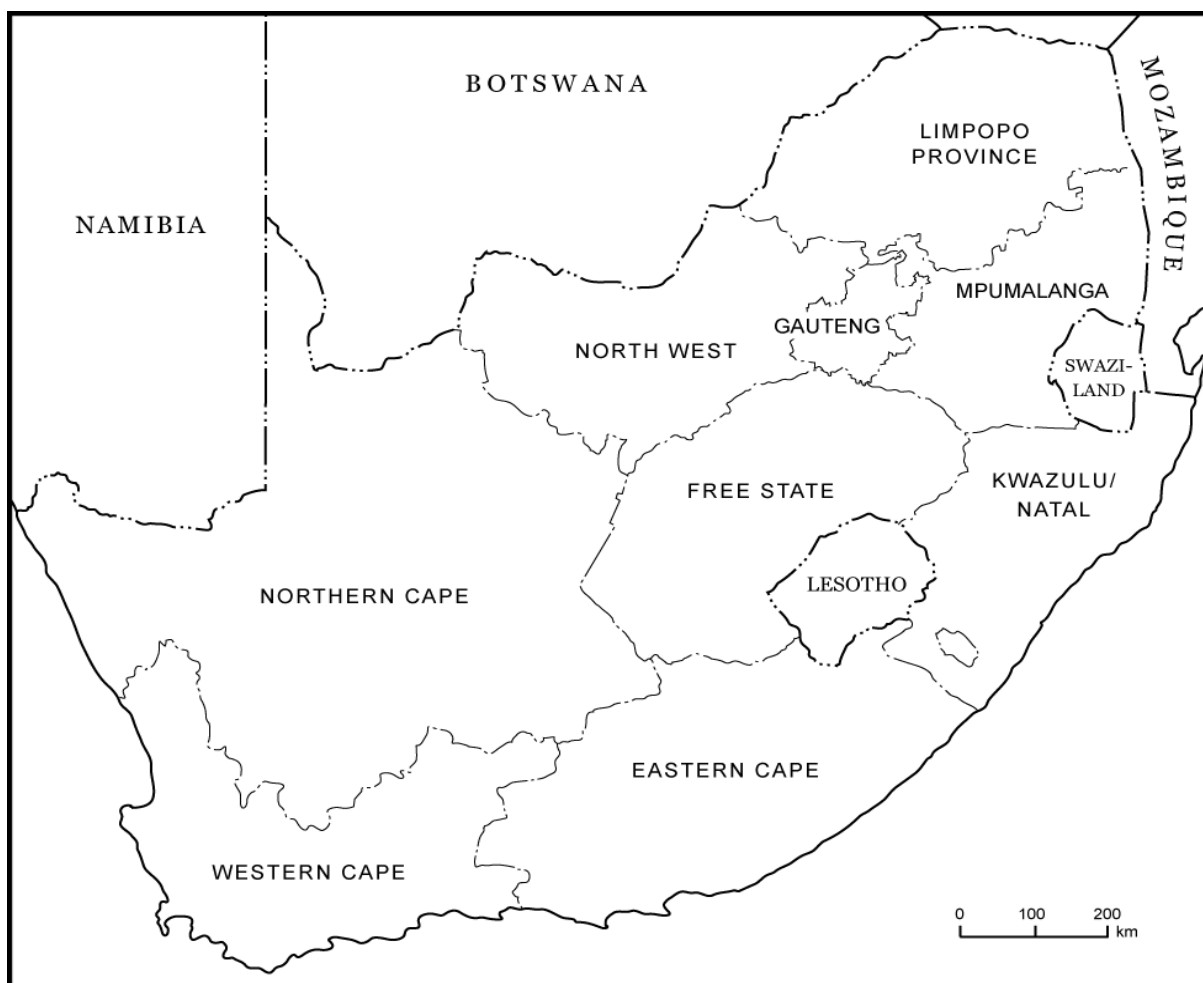


Figure 1: South Africa’s nine provinces (illustration: Christian M. Rogerson and Jayne M. Rogerson).



As a result of data inadequacies the contemporary monetary contribution of coastal and marine tourism to South Africa's tourism economy is difficult to calculate (Bob et al., 2018). Nevertheless, a good estimate of the size of coastal tourism across South Africa's four coastal provinces of Northern Cape, Western Cape, Eastern Cape and KwaZulu-Natal (Figure 1) can be obtained from analysis of the municipal level data which can be extracted from the IHS Global Insight data base. In this analysis tourism data was aggregated for the four South African coastal metropolitan municipalities (Cape Town, eThekweni, Nelson Mandela Bay, Buffalo City) as well as 11 coastal district municipalities.

The key findings of the analysis for 2015 are as follows. First, that coastal destinations account for 28% total tourism trips, 33% bednights but 40% total tourism spend in South Africa. Overall, coastal destinations are dominated substantially by domestic as opposed to international tourists; in 2015 estimated domestic tourism trips were 9.8 million as compared to 1.6 million for international trips. In terms of geography there is a major spatial unevenness in the development of the coastal tourism economy. Contemporary South Africa's coastal tourism economy is dominated by the two metropolitan areas of Cape Town in Western Cape province and eThekweni (includes Durban) in KwaZulu-Natal. These two centres are major urban tourism destinations which together account for 75 percent of total tourism spend in coastal areas of South Africa in 2015. (Rogerson & Rogerson, 2014, 2017). Cape Town is the leading centre nationally and accounts for 41% total spend in coastal destinations with eThekweni (Durban) a further 24% of total spend. Other notable coastal destinations as defined by total tourism spend are the district municipalities of Garden Route (8.0%) in Eastern Cape, Overberg (4.9%) in Western Cape, and Ugu (4.4%) in KwaZulu-Natal province. These five leading destinations together account for 82% total spend recorded for South African coastal areas during 2015, a finding which shows the geographically uneven character of the tourism space economy. South Africa's fourth coastal province - Northern Cape (Figure 1) - attracts few coastal visitors as its major tourism products are desert scenery, wildlife based attractions and the heritage products of Kimberley, all inland rather than coastal attractions.

Overall, of total trips to South African coastal destinations the major purpose of travel is recorded for visiting friends and relatives (VFR, estimated total 6.4 million) followed by leisure (2.9 million), business (1.3 million) and 'other' (0.3 million). In all categories of tourism Cape Town and eThekweni are the leading destinations; for VFR eThekweni is clearly most important (eThekweni 2.0 million, Cape Town 0.9 million); for leisure and business the most significant is marginally Cape Town (for leisure Cape Town 0.776 million trips vs eThekweni 0.751 million and for business Cape Town 0.4 million trips vs eThekweni 0.3 million). This said, in terms of all tourism trips eThekweni is the leading coastal destination accounting for 27.0% as opposed to 15.6% for Cape Town. Finally, the analysis of the IHS Global Insight data indicates that share of coastal tourism in total tourism in South Africa appears to be in relative decline mainly because of the post-2010 demise/stagnation in tourism and especially of the downturn in domestic tourism because of poor economic conditions (Rogerson, 2015). This downturn of tourism in coastal areas of South Africa reinforces the relevance of interrogating current planning initiatives which were developed post-2015 by South Africa's national Department of Tourism after the sectors of coastal and marine tourism as well as small harbour development were incorporated into Operation Phakisa.

According to Potgieter (2018: 61) after 2015 South Africa's national Department of Tourism began an engagement process with the four coastal provinces in order to establish a set of

planning initiatives towards “stimulating coastal tourism”. The planning for South Africa’s coastal and marine tourism sector followed closely the Operation Phakisa methodology of convening the Coastal and Tourism ‘laboratory’ for a period of five weeks during April and May 2016 in order to prioritise issues and develop solutions and action plans (Department of Tourism, 2016a). A total of 40 people from more than 20 different organisations engaged with the laboratory. Representatives came from several departments of national government, all four coastal provinces, local and community government organisations and a wide array of environmental and tourism organisations. The overarching vision of this planning laboratory was “to grow a world-class and sustainable coastal and marine destination that directly benefits South Africans” (Department of Tourism, 2016b: 3).

Five cross-cutting enabling initiatives were identified to unlock the opportunities in South Africa’s coastal tourism economy (Department of Tourism, 2016a). These relate to marketing, safety and security, a review of regulations and permits, the enhancement of skills for transformation as well as for building entrepreneurship in coastal areas, and sustainability planning in terms of improved data repository with socio-economic and environmental information to guide spatial planning. Four further planned sets of initiatives were announced. First, is to identify and elevate events/festivals that would attract both domestic and international visitors especially in the off-peak season. Second, is to promote a set of tourism routes along coastal areas in order to market together certain attractions and a variety of experiences (cf. Myles, 2013). A potential impact of tourism route planning is addressing the existing observed uneven spatial impacts of coastal tourism which are concentrated at present particularly upon the cities of Cape Town and Durban. Third, is to tackle the challenges of infrastructural issues and shortcomings that constrain the growth of coastal and marine tourism particularly in non-metropolitan spaces. Last, is to seek to market coastal attractions that currently are not well known albeit are considered to offer future potential as tourism products (Department of Tourism, 2016b). During 2017 Cabinet approved the Coastal and Marine Tourism Implementation Plan. The plan is currently (end-2018) moving towards a phase of implementation and reportedly will include a commitment to strengthen the linkages of tourism with other areas of Operation Phakisa (Department of Tourism, 2016a).

## 5 Conclusion

The sustainable use of ocean resources is captured by the concept of the ‘blue economy’, which is gaining considerable importance across several countries in the global South. Coastal and marine tourism is one of the most significant sectors of the blue economy and arguably of critical importance for many African countries. This paper has analysed emerging planning for coastal and marine tourism in South Africa as part of blue economy planning which is conducted under the rubric of Operation Phakisa. Within international existing scholarship on coastal planning the unfolding South African experience is of considerable interest. The broad planning framework of Operation Phakisa is challenged about a number of shortcomings, most importantly for prioritising investment attraction and economic growth stimulation over issues about the conservation of maritime resources. The specific implementation of initiatives for coastal tourism is still in the process of being identified for roll out. One clear focus is, however, to plan for spreading more widely the spatial impacts from tourism development. Given the environmental sensitivity of South African coastal areas it is critical that careful monitoring of these initiatives be undertaken by researchers in

order to determine whether these initiatives for unlocking the potential of coastal and marine tourism conflict with sustainability issues.

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