

Tourism Development Framework Draft

(Adapted from MS Powerpoint Presentation)

For the Maputo Special Reserve and Futi Extension TFCA components



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Note:

This document has been produced as an annotated version of a presentation of Stage 1 of the Tourism Development Framework for the Mozambican component of the Ndumo/Tembe/Futi TFCA, given at MITUR level. It must be acknowledged that this document is not produced as a final report. Subsequent to the completion of Stage 2 & 3 a complete report will be submitted with full reference to all relevant background data.

PROJECT FOCUS

The focus of this study is on the Mozambican component of the TFCA and its direct synergies to neighboring components. This study also mainly concentrates on tourism issues, and not necessarily management or other issues.

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Project process

STAGE 1: MASTER PLAN

Phase i : Confirm Goals & Objective Statement

Phase ii : Data Collation

Gather and collate all existing data available for study area including:

- Biophysical
- Infrastructure
- Socio-economical
- Institutional
- Legal, etc.

Phase iii : Regional Overview

Conduct a regional overview of the macro area in order to determine micro integration.

Phase iv : Determine & Evaluate The Tourism Opportunities & Constraints In terms of The Four A's

Namely:

- Attractions
- Access
- Amenities
- Awareness

Phase v : Determine An Ideal Tourism Model For The Project Informing Diversity Of Both:

- Market
- Product

Phase vi : Develop A Zoning Plan For Tourism Development in terms of:

- Utilization
- Activities
- Facilities
- Circulation

Phase vii : Develop Zoning Plan Into Master Plan Indicating Quantities And Lay-Out

Phase viii : Determine Critical Interventions

STAGE 2: FINANCIAL FEASIBILITY

Phase i: Determine Phasing Programme

Phase ii: Determine Costs

Phase iii: Determine Income Streams

Phase iv: Define Financial Feasibility

STAGE 3: THE WAY FORWARD

**Phase i: Define a Roll-out Framework
For Implementation**

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1. Phase i: Goals and objectives

Goal:

To determine a sustainable tourism development framework for the Mozambican component of the Usuthu / Tembe / Futi TFCA, based on maximization of opportunities to become a premier tourism destination in southern Africa

Objectives:

Key objectives:

To provide tourism overlay that will serve as an input to the MSR - Futi TFCA Management plan and also to the IDDP.

General objectives:

Stage 1

1. Understand the tourism demand (Potential Market)
2. Understand bio-physical supply (Potential Product)
 - To identify and prioritise opportunities for tourism development in the region.
3. Integrate Supply and Demand so as to maximise tourist experience and optimise socio-economic benefit.
 - To propose a coherent planning approach to facilitate tourism development
 - To determine infrastructure requirements in and around the TFCA in line with identified opportunities

Stage 2

1. Achieve financial feasibility for funding and investment
 - To forecast costs and benefits, direct and indirect to MSR/Futi and the surroundings
 - To identify resources required for implementation of the MSR/Futi extension Tourism Development Framework and define a strategy for resource mobilisation.

Stage 3

2. Determine an implementation plan
 - To propose an action plan embracing key activities and time lines for development and implementation.

- To identify key stakeholders and propose and integrated institutional framework for participatory development and implementation of the MSR/Futi extension Tourism Development Plan in terms of infrastructure development, investment promotion, marketing of the projects, community participation and resource mobilisation.

Scope of Work

Stage 1

- 1) Review the tourism and zoning plans of the Futi corridor area, the TFCATDP draft PAD and other relevant documentation of the Matutuine district and collect as much tourism and conservation information as possible on various issues concerning the district including maps (vegetation, coastal, settlements, rainfall, etc.), land use, agriculture, livestock, mining, etc.;
- 2) Developed a tourism zoning of the Futi TFCA including a list and description of the area tourism assets and opportunities for improving such assets;
- 3) the type of tourism to be catered for in the circuit (up-market, eco-tourism, back packer etc);
- 4) The development standards expected for each type of tourism development e.g. what are the minimum standards for eco-tourism for example);
- 5) The market for each type of tourism;
- 6) The level of each type of tourism required for the circuit;
- 7) evaluation of current status of tourist's infrastructure and support services, identify shortfalls, new opportunities and recommended regional linkages;
- 8) identify new "enabling" infrastructure (roads, airfields, tourists, accommodation, customs posts, water supply, electricity, health facilities telephones, etc. and tourist attractions, identify shortfalls and recommend improvements where necessary;
- 9) Based on the above and the already approved Priority Areas for Tourism Investment suggest locations for each type of tourism development.
- 10) identify the most ideal sites for customs' posts that will allow easy movement of tourists;
- 11) identify tourist attractions that would be packaged in marketing tourism, and produce maps that would show linkages within the TFCAs;

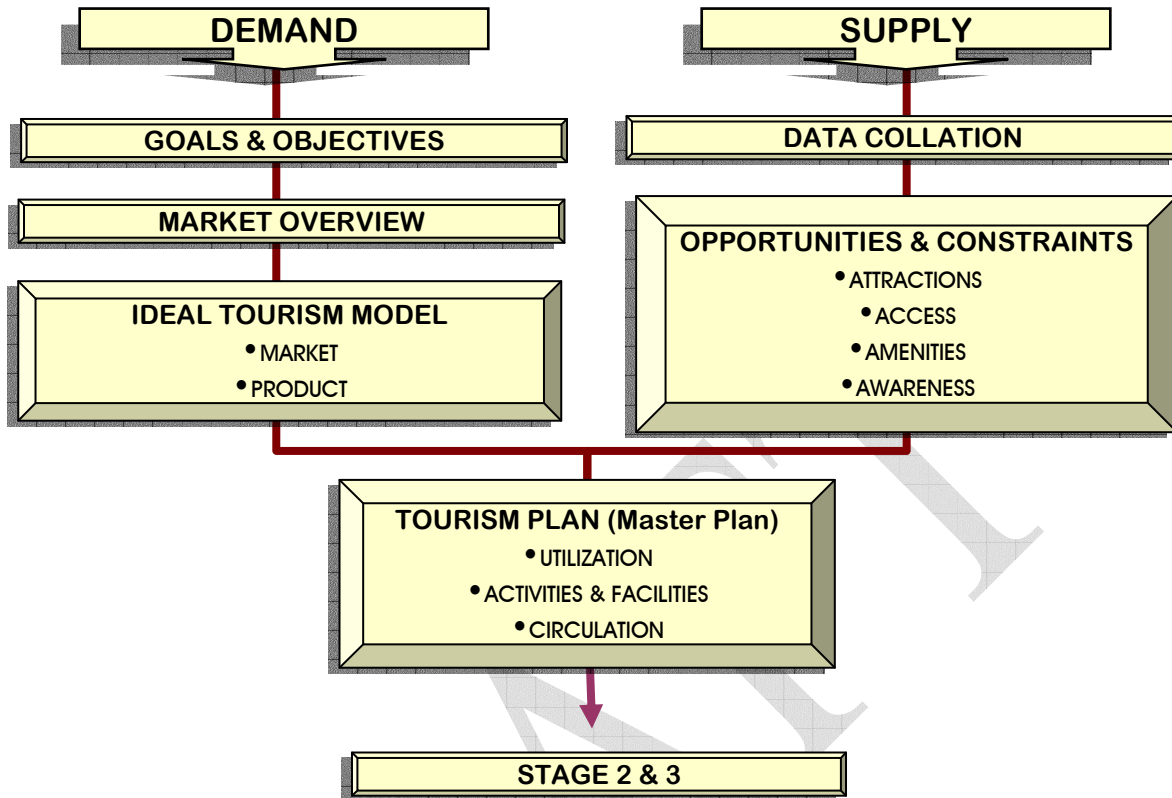
Stage 2

- 12) Develop a phasing programme for the development of identified infrastructure within the MSR - Futi TFCA .
- 13) Define the Financial Feasibility of the proposed developments through determination of costs and income streams.

Stage 3

- 14) Define a roll-out framework for implementation of the developments proposed in the Tourism Development Framework.
- 15) Identify the priority sites for private sector investment.

Stage 1: Master Planning process



2. Phase ii: Data Collation

The creation of a Tourism Development Framework is primarily guided by the following departments and policies which are briefly listed below. A list of documents consulted and referenced is provided at the end of the document.

Planning Environment

Department of Tourism - MITUR

Ongoing consultation with MITUR and the Elephant Coast Development Agency (ECDA) which was formed by the GOM with the specific objective of stimulating responsible tourism development with community participation and empowerment in the district of Matutuine. Consultation occurred at both district and National level.

National Tourism Policy and Strategy for Mozambique (2003) & Strategic Plan for Tourism Development in Mozambique (2004)

The Ndumo/Tembe/Futi TFCA identified by the Strategic Plan for Development of Tourism in Mozambique (SPDTM (2004)) and Tourism Policy and Implementation Strategy (2003) as being a focal area for strategic tourism development.

The three platforms for tourism development identified in the SPDTM are exemplified in the study area as follows:

1. The Elephant Coast is identified as a type A/B Priority Area for Tourism Investment (PATI).

Existing Destinations with limited development (Type 'A/B')				
Zone	Type	Name & Location	Key Products	Market segments
1	A/B	Elephant Coast Tourism Zone includes Coastal zone between Maputo and Ponto do Ouro in Maputo Province	Coastal eco-tourism Water sports Sun, sand and sea	Regional, domestic leisure International leisure Niches

SPTDM (2004) – Ministerio de Turismo

2. MSR and Futi Extension form the Mozambican component of the Ndumo/Tembe/Futi TFCA.
3. Components of the study area are incorporated into two of the identified Tourism Routes in Southern Mozambique.

Tourism Routes in Southern Mozambique	
Lebombo Circuit	Kosi Bay (SA) - Santa Lucia (SA) - Ponto do Ouro - Maputo Elephant Reserve – Maputo – Namaacha – Swaziland
	A unique experience combining beach, bush, heritage, water sports, cultural diversity, scenic beauty, special interest activities such as birding and diving. Brings together Mozambique, Swaziland and South Africa.
'Costa das Lagoas' Route	(Ponto do Ouro - Maputo Elephant Reserve) – Maputo - Xai-Xai – Inhambane – Vilankulos
	A southern Mozambique Coastal Route starting in Maputo or even at the SA/Moz border in Ponto do Ouro, upwards until Vilankulos/Bazaruto Archipelago. This Route focuses on coastal eco-tourism and connects the many coastal lakes of the southern coast. The Route brings together scenic beauty, beach, water sports, different coastal eco-systems and flora and fauna (sand dunes and forests, coastal lakes, birds, turtles, marine life etc.)

SPTDM (2004) – Ministerio de Turismo

Department of Planning – MICOA

Consultation with MICOA and reference to the District Landuse Plan for Matutuine. Although this plan is currently being updated, it provides the context in which the TFCA is being developed. It is acknowledge that the Tourism Development Framework for the TFCA must take cognizance of district planning.

3. Phase iii: Regional overview



3.1 Existing landuse

Current land use is shown in figure below.

Data has been assimilated from the following sources:

- Site visits
- Consultation with MICOA
- **DNGC. 1997** - 1:250 000 Topocadastral Map
- **Van Aarde, R. 2004** – Restoration of the Tembe-Futi-Maputo Coastal Plain elephant populations.
- **MICOA 1996** - Plano do Uso da terra do distrito de Matatuine
- **Kloppers, R J. 2005** – Life in the Mozambique/South Africa Borderland since 1975. Doctorate thesis.
- **Kloppers, R J. 2001** – Local economic practices in the Matatuine district of Southern Mozambique: implications for Transfronteir conservation.

Proclaimed Parks

1. Maputo Special Reserve
 - Proclaimed with current boundaries by the Legal Diploma n° 22314 of 9 August 1969.
2. Tembe Elephant Park
 1. Ndumo Game Reserve

Agricultural land

- The Maputo river exhibits agricultural landuse along most of it length within Matatuine. A short section of the Maputo river directly to the south of the Liquati forest has limited or no agricultural usage.
- Numerous agricultural concessions allocated along Maputo river

Human habitation

- Higher densities associated with agriculture along Maputo River. Bela Vista, Salamanga, Massongue and Catuane.
- Very low density habitation within Futi corridor. Land uses in the Futi corridor are grazing of livestock and consumptive utilisation - predominantly palm wine and traditional medicine (Kloppers 2001).



3.2 Boundaries of MSR Futi extension

Maputo Special reserve boundaries (Legal Diploma n° 22314 of 9 August 1969)



North: The north coast, from the Estuary of the Maputo River, up to the arm of sea which forms Machangulo Peninsula and after the parallel which cross the south extreme of the referred arm to east coast.

East: The Indian ocean coast, from the above defined point (parallel 26°18') up to the Matonde mark.

South: The actual antihunting barrier which begins close to Matonde and extends west, crossing the south part of Piti lake, south of Chingute lake, Mechingane mark, then following the Salamanga-Ponta do Ouro road, for the distance of about 2 km, up to Nunes's canteen, after that perpendicularly following the referred road and along this up to Futi River.

West: The left margin of Futi River, in the distance varying between 50 and 100 meters, according with the actual barrier, then to northeast, from the guard post, until Viana; from this point the barrier follows again in the southnorth direction, in an extension of about 8 Km, finally following to North west until meeting the Maputo River right margin, then the water course up to the mouth of River.

*Within these limits, the Reserve has approximately an area of **80.000 ha***

Futi Extension

The current boundaries of the Futi Extension are presented in the figure below. The final positioning of the elephant restraining line (ERL) will define the Futi extension.

There is currently much consultation with local communities as to the positioning of the ERL. The president has declared that the communities should decide on the positioning of ERL. It was also stated that the Futi Corridor would be a corridor for elephants in order to prevent conflict.

There is currently a perception amongst local communities residing within the propose3d Futi corridor that they will lose access to the land if they allow the development of the ERL through areas which they are currently utilising. There is much work being undertaken by Peace Parks Foundation in the determination of the final positioning of the ERL.

Capacity for community consultation and involvement in the Futi corridor is currently being developed through the establishment of the ECDA on the ground in Matatuine and the appointment of a community liaison as part of the Tembe-Ndumo-Futi TFCA project.

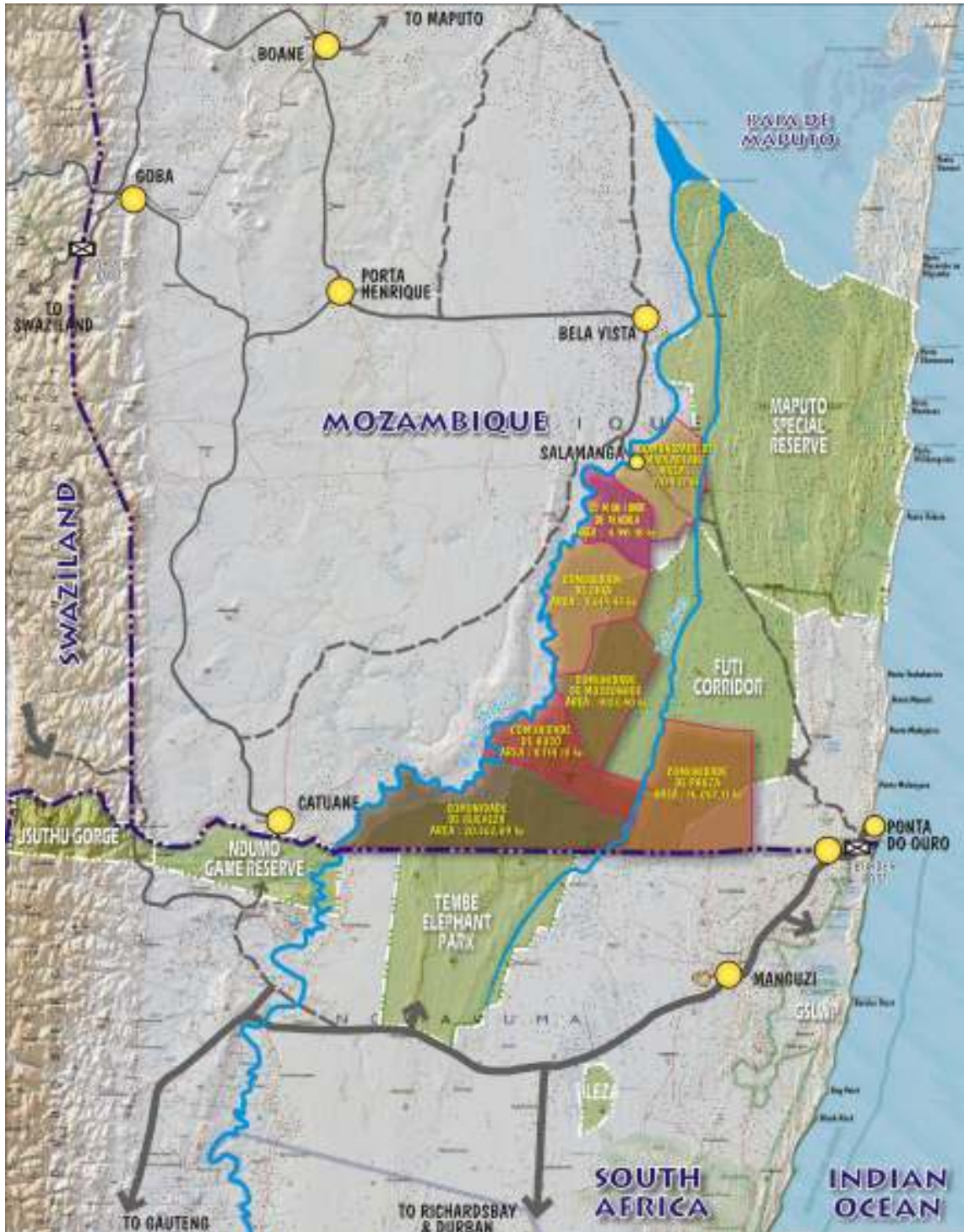
Once the ERL has been erected and mapped by CADASTRO the Futi extension to the MSR will be gazetted. The Futi extension and the current MSR will become known as the Maputo Special Reserve (MSR).

“Buffer Zones” or Community Wildlife Reserves have been referred to immediately adjacent to the MSR. These buffer Zones forms part of the TFCA, however their

boundaries are unclear and are yet to be defined through ongoing community consultation.

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Community boundaries within the proposed Futi corridor



The figure shows the community boundaries for communities living within the proposed Futi corridor area. It has been estimated that approximately 130 families live in the region

between the Maputo and Futi rivers, with most of these being associated with agriculture along the Maputo River (Kloppers 2001). Surveys conducted by Els and Kloppers (2000) indicate that 43% of people are willing to make their land available for tourism development. This reality has to be taken into consideration in the planning for this region.

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4. Phase iv: Evaluation of Tourism opportunities and Constraints

The 4 A's

A successful tourism product is defined by the fulfillment of four primary criteria that have been termed the 4 A's.

Attractions – A product needs to be attractive from a tourism perspective. The range and quality of attractions will determine the level of tourism that is possible.

Access – Once it has been determined that attractions are at a level that would promote tourism, access to these attractions must be evaluated. An attraction is of low tourism value if it is inaccessible. Opportunities and constraints of access should be evaluated.

Amenities – Once attractions and access have been established, the level and intensity of tourism will be defined by the facilities and activities available.

Awareness – Awareness of a product, that fulfils the above criteria, will define its success. Existing awareness should be evaluated together with the potential to improve awareness.

4.1 Attractions:

As a result of the study area covering an array of very diverse vegetation zones it has a diverse range of tourism attractions, offering it the potential to provide a totally unique destination. These include:

- Spectacular beaches and bays on the Indian Ocean seaboard.
- Pristine coral reefs with high potential for scuba diving.
- Various inland coastal lakes and the Futi and Maputo river deltas presenting a unique ecosystem with potential to be included as a World Heritage Site and RAMSAR site.
- Maputo Bay and the associated Mangrove zones adjacent to the Maputo Special reserve present a unique environment with high conservation value.
- Established reserves. Ndumo and Tembe are well established reserves with viable game populations and excellent birdlife associated with the Pongola River system. The Maputo Special Reserve has exceptional scenic beauty and a strong population of elephants.
- The Futi River with its natural riverine forest and adjacent sand forest and Lala palm zone hold the potential for excellent game viewing once animal populations have been re-established.
- The Usuthu, Maputo and Futi rivers with unique fauna and flora communities. The scenic floodplains of the Maputo River also hold good potential for supporting game populations.

- The area has strong cultural and historical aspects which can be developed as tourism attractions.



4.2 Access

Road Access

Border posts exist at:

- Ponta do Ouro (Mozambique / RSA)
- Goba (Mozambique / Swaziland)

Current road access is possible from:

RSA

South Africa has developed a high quality tarred road to the Ponta do Ouro border post. From this point the road is very sandy and only accessible to 4x4 vehicles.

Swaziland

Good access is available through Goba Border post on a tarred road to Porta Henrique.

Maputo

Good access on tar from Maputo to Boane, dirt from Boane to Bela Vista, tar from Bela Vista to Salamanga.

Internal access:

MSR

Roads are sandy and accessible to 4x4 vehicles only. Traveling is slow. An average speed of 15-30 km per means that only relatively short distances can be covered in a given time period. The slow traveling is however well compensated for by the scenic beauty of the roads which meander through the various vegetation types offering magnificent views.

Futi Corridor

A very basic network of roads is in existence at present and is focused on linking the various community nodes. Access is by 4x4 only.

Planned upgrading of the road between Ponta do Ouro and Boane has been tabled. This will provide greatly improved access to the area for people traveling from Maputo and South Africa. Concerns have been raised about the effect of commercial traffic on this route. According to the Lubombo Spatial Development Initiative heavy commercial traffic is to be routed through Goba.



Air Access

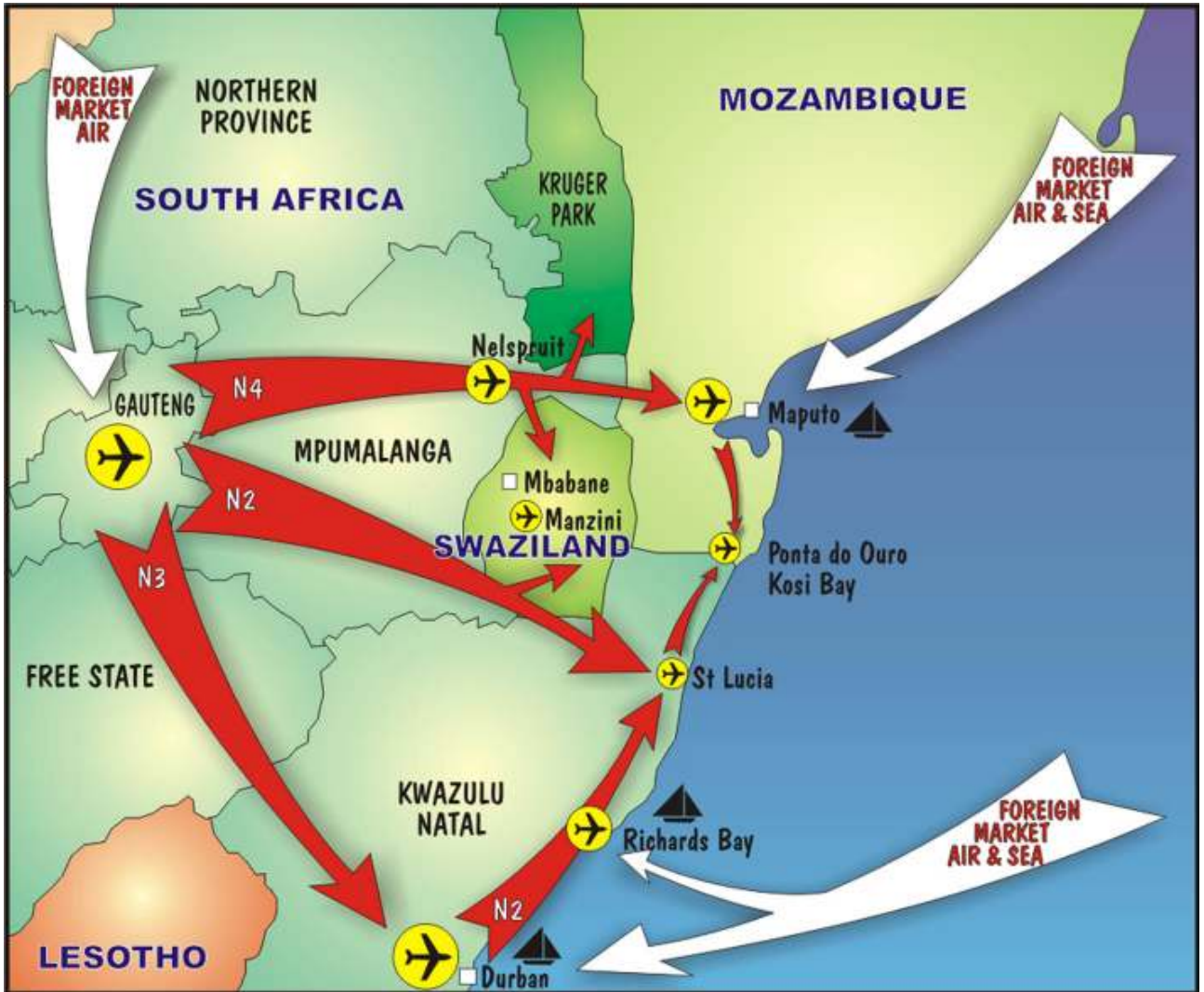
Air access to the study area is poor. The international airport at Maputo is the nearest airport. An airstrip is planned at Santa Maria, however this will be designed for small charter flights.

Rail Access

Currently there is no functional rail access to the area. The Calcrete mine at Salamanga has an operational rail link for the transport of products to Matola, however it is not envisaged that this will be upgraded to become a passenger line.

Marine Access

No marine access for medium to large vessels. No facilities exist for access, however it may be possible to access the MSR by small vessels from the Maputo Bay. Access to MSR may also be afforded by the Maputo River North of Bela Vista.



4.3 Amenities

Maputo Special Reserve

The reserve has been declared and defined by Legal Diploma n° 22314 of 9 August 1969. As such it is under Government control allowing a clear definition of land utilisation rights and ownership.

1. Four primary bays in MSR have limited development. All of these bays are accessible along 4x4 only tracks. Access to the beach has been created at all these bays.
 - Ponto Chemucane has several sheltered campsites which have been cut into the dune forest immediately adjacent to the beach. All of these sites are informal and have no legal status. There are no permanent structures in this area. There are no facilities. Lake Mazai provides a nearby source of fresh water
 - Ponto Membene also has several sheltered campsites cut into the dune forest. A small freshwater lake immediately behind the campsites provides water. This site has also been illegally used. There are no permanent structures and no facilities.
 - Ponta Milibangalala has the only legal facility which is comprised of 10 campsites cut into the dune vegetation adjacent to the beach. Pit latrines are provided, but there is no running water. Pits have been dug to dispose of refuse. This campsite is currently operated by the MSR authority. A Game Scout is positioned at this facility to control the collection of fees and vehicular access to the beach. Current rates charged for this facility are very low (R35-00 per person) by Mozambican standards, however this is attributed to the lack of facilities.
 - Ponta Dobela has several campsites in the dune vegetation. These are also being illegally used. There is evidence of an old development sheltered behind the point. This facility is in a state of ruin.

Several other small campsites exist along the coast, however these have no legal status.

2. No amenities exist in the remainder of the reserve. The lakes, flood plains, forests and rivers are undeveloped in terms of amenities. Local communities living within the reserve utilize several of the larger coastal lakes for fishing and have small fishing camps on the shores.
3. Two community lodges have been developed near the boundary of the MSR at the 2 official entrance gates. These lodges were built by the communities on their land using NGO funding. Their facilities are far in excess of facilities currently provided within the park.

Futi Corridor and “Buffer Zones”

There are currently no amenities within the Futi corridor.

Coastline south of the MSR

Various facilities exist at all the bays between Ponto do Ouro and the southern boundary of the MSR. Facilities also exist on several of the coastal lakes.

Amenities range in status from basic to exclusive. The legal status of many of these facilities is uncertain.

Transboundary components of TFCA

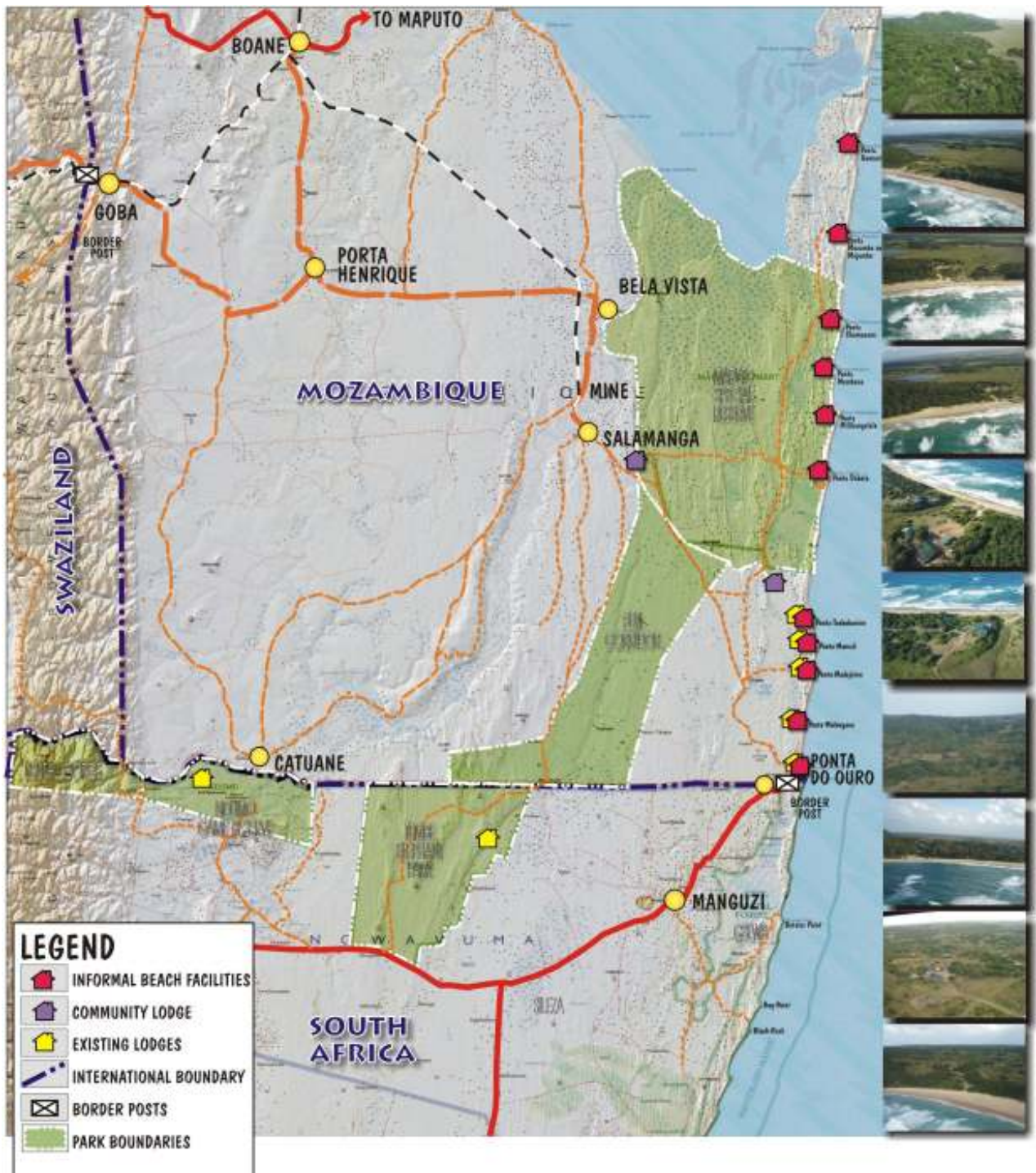
1. Tembe Elephant Reserve

The park has a well developed tourist infrastructure catering for day visitors to the park. Several viewing hides have been established.

Accommodation is run by a private concessionaire and caters to the middle and upper segment of the market.

2. Ndumo Game reserve

This park has well developed amenities catering to the lower, middle and upper segment of the tourist market. Both self catering and exclusive fully catered options are available.



4.4 Awareness

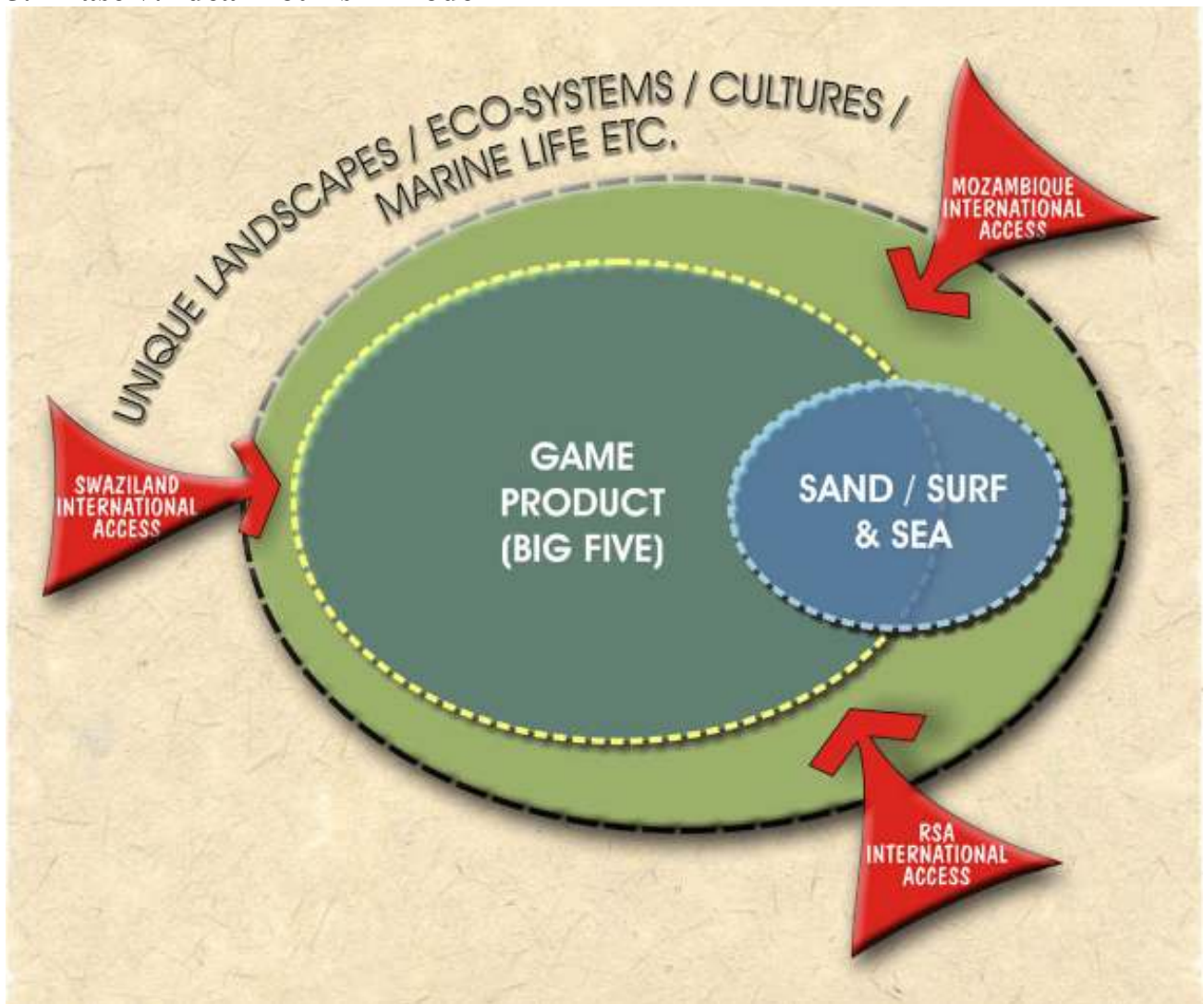
The area is relatively unknown to the broader tourism market. Only Ponto do Ouro is better known due to its past history as a popular holiday town and its current reputation as a diving venue.

Awareness of the area has been promoted through the eco-adventure niche markets and the area is known as being a pristine beach getaway with no facilities.

A basic evaluation of awareness to all segments of society was conducted by performing an internet search for the keywords *Maputo Special Reserve*. 90 000 documents containing the words were found. A search for *Kruger National Park* returned approximately 4 300 000 hits, *Serengeti National Park* returned 1 100 000 hits, while *Addo Elephant Park* returned 342 000 hits.

Although this search includes non-tourism related awareness, it does indicate that there is a relatively low awareness of the area. However the ratio of awareness to visitor arrivals to the park does not seem in line with the other parks suggesting that factors such as amenities and access pose a greater limitation than awareness.

5. Phase v: Ideal Tourism Model



Market:

The area holds the potential to provide a destination to the following market segments:

- **Mozambique:**
Mozambicans in the top and medium income brackets, particularly from Maputo; foreigners resident in Mozambique; visiting friends and relatives; other tourists to Mozambique (e.g. Business tourists who want a break).
- **South Africa and Swaziland:**
Top, middle and lower segments of the market.
- **International:**
Top and medium segments, in the longer term, once the product has become more established and linkages have been created.

The National Tourism Policy (2003) supported by the SPDTM (2004) identify the Elephant Coast PATI for international, regional and domestic leisure market. This area is suitable for the upper and middle market sectors.

Product:

Medium to Long term

The TFCA has the potential opportunity to offer a unique product, not available anywhere else in terms of diversity and accessibility to market. The opportunity consists of the combination of the eco-tourism product (fauna, flora, scenery etc.) with the so-called “sun, surf and sea” product.

The TFCA has the potential, within a relatively small geographical area of one conservation area, to combine elements which have historically only been packaged across geographically separate conservation areas. The concept of “Bush to Beach” links is one which is desirable as it has the potential to dramatically expand the market segments to which a product has access.

The distance from pristine beach attractions to the Futi floodplains, with the potential to offer excellent game product in the long term, is less than 50 kilometers. The distance from the Futi flood plains to Tembe, Ndumo and the Usuthu gorge is in the region of 20 - 30 km respectively. This provides the opportunity to establish viable links between the various products within the TFCA that encourage the flow of tourism to all the components, thereby ensuring sustainability of the product and an equitable distribution of benefits through the entire TFCA.

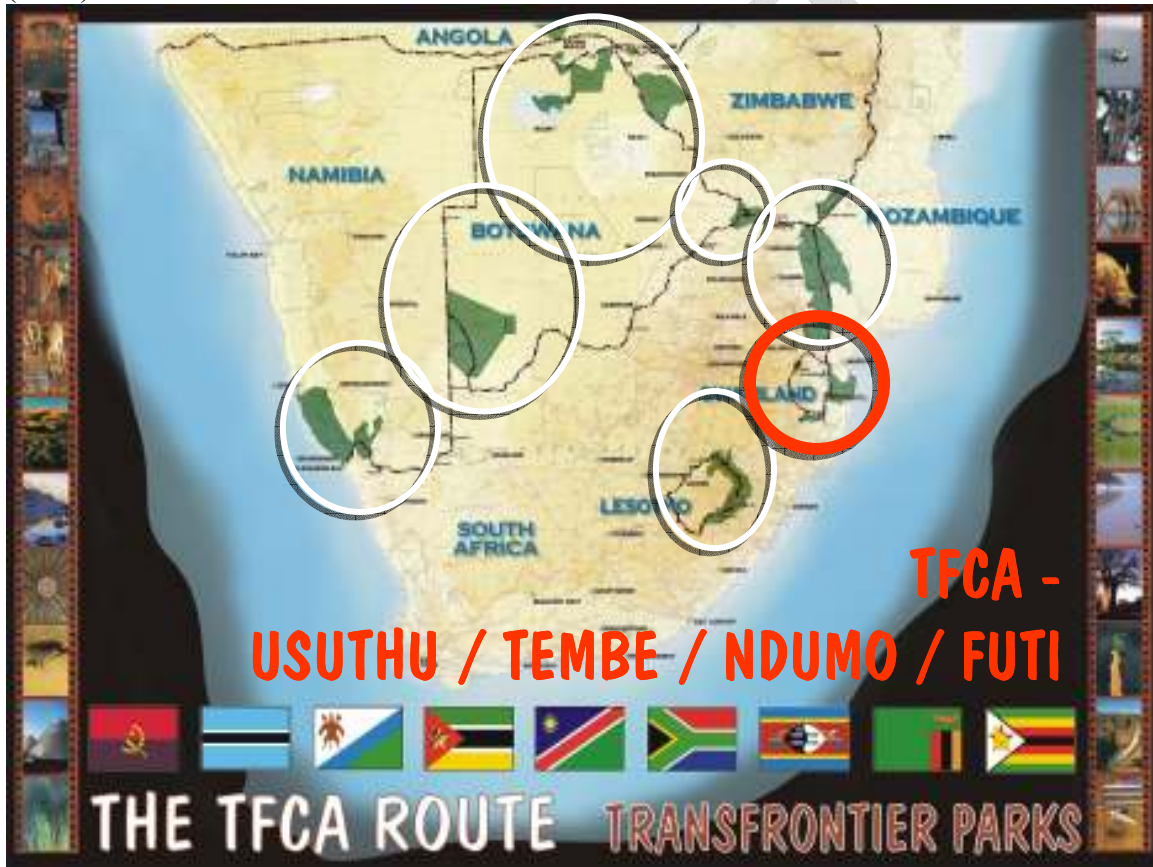
Short to Medium term

Short term product will focus on “sun, surf, sea” (Primary attraction) and establishment of other components (eco-tourism) within current MSR. This is in line with the PATI concept proposed by the SPDTM (2004).

The product will be further developed within the Futi corridor in a manner which increases the value and attractiveness of the area for investment in the medium and long term in order to ensure that the vision for the long term product is attained.

The Ndumo-Tembe-Futi TFCA forms an important link in the greater picture of the TFCA route.

In terms of short to medium term development the TFCA has the potential to capitalize on existing local markets in the 3 partner countries. This is in line with the SPDTM (2004).



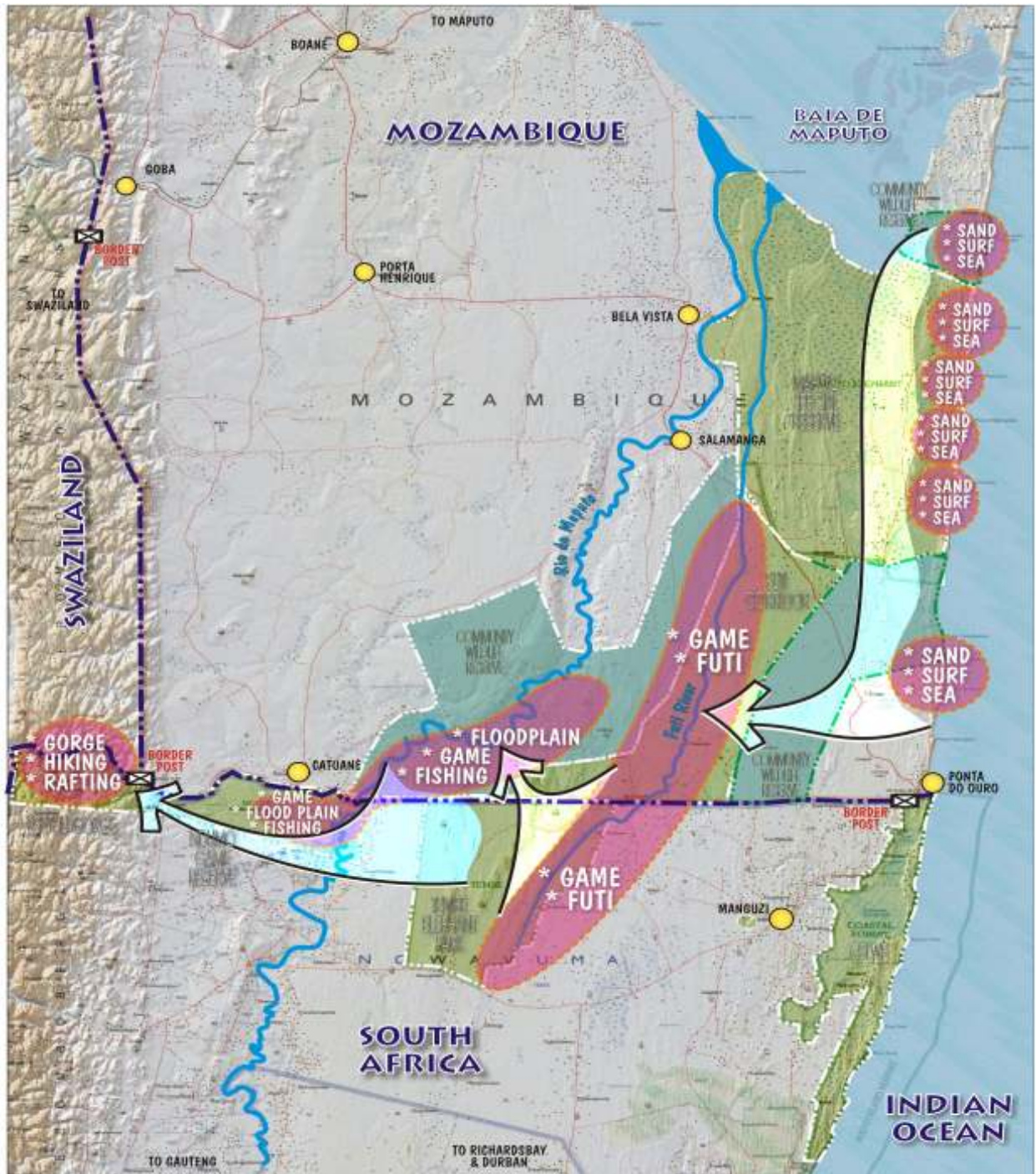
6. Phase vi: Zoning Plan

6.1 Utilization

The zoning attempts to maximize the visitor's experience of the TFCA product. It is therefore recognized that the TFCA offers the following primary attractions:

- The Indian ocean seaboard with its bays and the adjacent lakes system (Short, Medium, Long term)
- The Futi river and floodplains in Futi Extension (Medium, Long term)
- The Rio do Maputo with its floodplain lakes (not properly included in the present boundaries – potential inclusion as community wildlife reserves)(Medium, Long term)
- Tembe Elephant Reserve and Ndumo Game Reserve (Medium, Long term)
- The Usuthu gorge (Medium, Long term)

These attractions are strung together as a route within the TFCA, offering a complete experience of all the primary attractions to the visitor, whilst allowing for traveling through the secondary attractions en-route. Ideally operating contracts / concessions should be packaged so as to allow for above, meaning that any one operator / concessionaire will have access and accommodation to and in all 5 primary attractions. This should remain a Medium to Long term goal.



In the Short to Medium Term it is recognized that the product (Bush&Beach) on which the long term utilization zoning is based, requires further establishment in order to increase its value and attractiveness for investment.

The Mozambican Government has expressed the desire to begin with several high value private sector investment opportunities at the primary attractions along the coast line. It is felt that the value of tourism opportunities in the MSR and Futi Extension needs to be

increased before further private sector investment is sought. The proposed zoning for the short and medium term takes this into account and aims to develop a tourism framework which will allow the MSR and Futi extension to be utilized in a manner that generates income and community benefit in the short term, while increasing the value for high value tourism investment in the medium to long term.

Current realities on the ground preclude the adoption of the ideal model presented above:

- TFCA will only become fully operational once the international fence between Tembe, Ndumo and the Mozambican component have been removed. This can only occur once a game proof fence has been erected on the boundary of the entire MSR and its extensions. The current Elephant Restraining Line (ERL) is unable to address issues such as veterinary control and human/animal conflict with species other than elephant.
- The current status of community consultation with regards to the erection of the Elephant restraining line (ERL) has revealed that communities fear losing access to the land without adequate compensation should any other form of fencing be erected. It will be critical for the ECDA and the TFCA community liaison to foster strong community relations and to promote the potential benefits associated with tourism related activities, both consumptive and non-consumptive.

It is expected that over time, as the benefits to communities of tourism related activities as opposed to subsistence agriculture and animal husbandry become apparent, portions of community land will be incorporated into the Futi corridor.

The Futi extension of the MSR will be gazetted according to the placement of the current ERL. This land will be under government control. The extensions to the Futi corridor by the inclusion of community land (referred to as “Buffer areas” or Community Wildlife Reserves) will have to be negotiated with the community, but it is expected that it may take the form of a contract park whereby the community retain ownership and usage rights (consumptive and non-consumptive). Full game proof fences would be constructed on the periphery of this area. This process will take several years to unfold. It is only once this process has run to conclusion that the fences with Tembe Elephant Reserve and Ndumo Game Reserve can be removed. At this point the process of repopulating the Futi Corridor with game can begin.

6.2 Facilities

A tourism zoning of the Mozambican component of the TFCA is indicated in the figure below.



Short term:

1. Primary facilities within the MSR will be developed on the seaboard. This area has the capacity to cater for the upper and middle segments of the market.

The zoning provides for high value concessions with exclusive use areas as well as for medium value development nodes without exclusive use areas.

- The seaboard from the northern limit of the MSR to south of Ponto Chemucane is zoned for Low Volume and High Value development. This area is seen as being ideal for this type of development as it provides:
 - i. Attractions – this site has access to pristine marine attractions, coastal dune forests and lakes, mangrove forests and Maputo Bay.
 - ii. Access – potential for airstrip at Santa Maria. Access from Maputo bay by water craft. Road access through existing MSR road network. High value development holds good accessibility as a priority in determining feasibility. The opportunities offered by potential air and water access are likely to make this site more valuable. Maputo is likely to be the primary staging post for such an up market concession. Ease of access is ensured.
 - iii. Community - this site provides good opportunity for community incorporation in the development concept.

 - The seaboard south of Chemucane to north of Ponto Dobela is zoned for Medium Volume and Medium Value tourism utilization. It includes Ponto Mamoli and Ponto Milibangalala. It is envisaged that this area will provide facilities that cater for larger volumes of tourists than Low Volume zones. The area is better able to accommodate higher volumes of tourists due to the more expansive nature of the coastal bays. Facilities envisaged in this zone include:
 - Scenic campsites with good amenities.
 - Well appointed self catering accommodation units (possibly log cabins) aimed at the family market.

 - The seaboard north of Ponto Dobela to the southern boundary of the MSR is zoned for Low Volume and High Value development.
 - i. Attractions - this site combined with access to Lake Piti provide opportunity for diversification of activities to accommodate ocean and fresh water based activities such as boat cruises.
 - ii. Access – this site has the potential for good access to markets based in South Africa.
 - iii. Community - this site provides good opportunity for community incorporation in the development concept.
2. Secondary facilities within the MSR will be developed on the floodplains and dune forests. This area has the potential to cater primarily to the middle and lower segments of the market. The zoning allows for the different markets to be differentiated.
- The section of the MSR between the Maputo and Futi rivers from Bela Vista to Ponto Camandjuba (Maputo bay) holds excellent potential for Low Volume and High Value development.

- Attractions - this site holds great potential for birding. The Maputo and Futi River provide good game viewing. Magnificent vistas over Futi delta. Fresh water based activities such as boat cruises.
 - Access – this site has the potential for good access to markets using Maputo as a staging post. Boat access from Bela Vista can be used for clients and supplies.
 - Community - this site provides good opportunity for community incorporation in the development concept
- The remainder of the MSR has been zoned for Medium Value and Medium Value tourism development. The scenic inland lakes and unique vegetation will support the development of “eco-adventure” type facilities such as remote wilderness campsites linked to self drive 4x4 routes. These facilities should retain the remote/wilderness character of the region and have limited facilities. They should cater for small numbers of people and charge a premium rate for this exclusivity.
3. The Futi extension of the MSR has been zoned for Low Volume and Medium Value tourism usage. Facilities envisaged in this zone in the short term will be “eco-adventure” type facilities such as remote wilderness campsites linked to self drive 4x4 routes to explore this unique and scenic area. These facilities should retain the remote/wilderness character of the region and have limited facilities. They should cater for small numbers of people and charge a premium rate for this exclusivity.

The zoning of the Futi extension of the MSR as Low volume and Medium Value will allow for the development Low Volume and High Value facilities in the medium to long term.

4. The zoning includes the “buffer zones” or Community Wildlife reserves. These areas are zoned for Low Volume and Medium Value tourism utilization. It is envisaged in the short to medium term that these areas will be predominantly consumptive use areas deriving benefit through hunting and very limited “eco-adventure” type tourism.

The zoning of these areas as Low volume and Medium Value will allow for the development Low Volume and High Value facilities in the medium to long term.

Socio Economic Benefits:

1. Socio-economic benefit to the Mozambique district communities must be maximized. These benefits need to be established, quantified and strategised. Apart from the potential benefit from the proposed potential external utilization (agriculture, community wildlife reserves, upgrade roads and infrastructure), the TFCA itself should maximize socio-economic benefit through primarily:
 - Conservation establishment and management

- Development of TFCA infrastructure
- Tourism development and operation
- Resource utilization

Above aspects should offer the widest spectrum of benefit including:

Shareholding
Training
Job creation
Management
Trading, etc.

The issues of socio-economic benefit will be addressed in Stages 2 and 3 of this study (to follow pending approval of Stage 1).

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6.3 Activities *Inside TFCA*

The seaboard:

- Bathing
- Snorkeling
- Deep sea fishing
- Diving
- Sea-kayaking
- Horse riding



The Lake system:

- Fishing
- Boat cruises
- Kayaking



The Futi River and Tembe:

- Game viewing



The Rio do Maputo and Ndumo:

- Bird watching
- Game watching
- Fishing (especially tiger fish)
- Boat cruises



The Usuthu Gorge:

- Hiking
- Seasonal river rafting
- Game viewing
- Hunting
- 4 x 4



TFCA surround (Mozambique)

Potential for community wildlife reserves with associated non-consumptive and consumptive utilization (safari hunting)



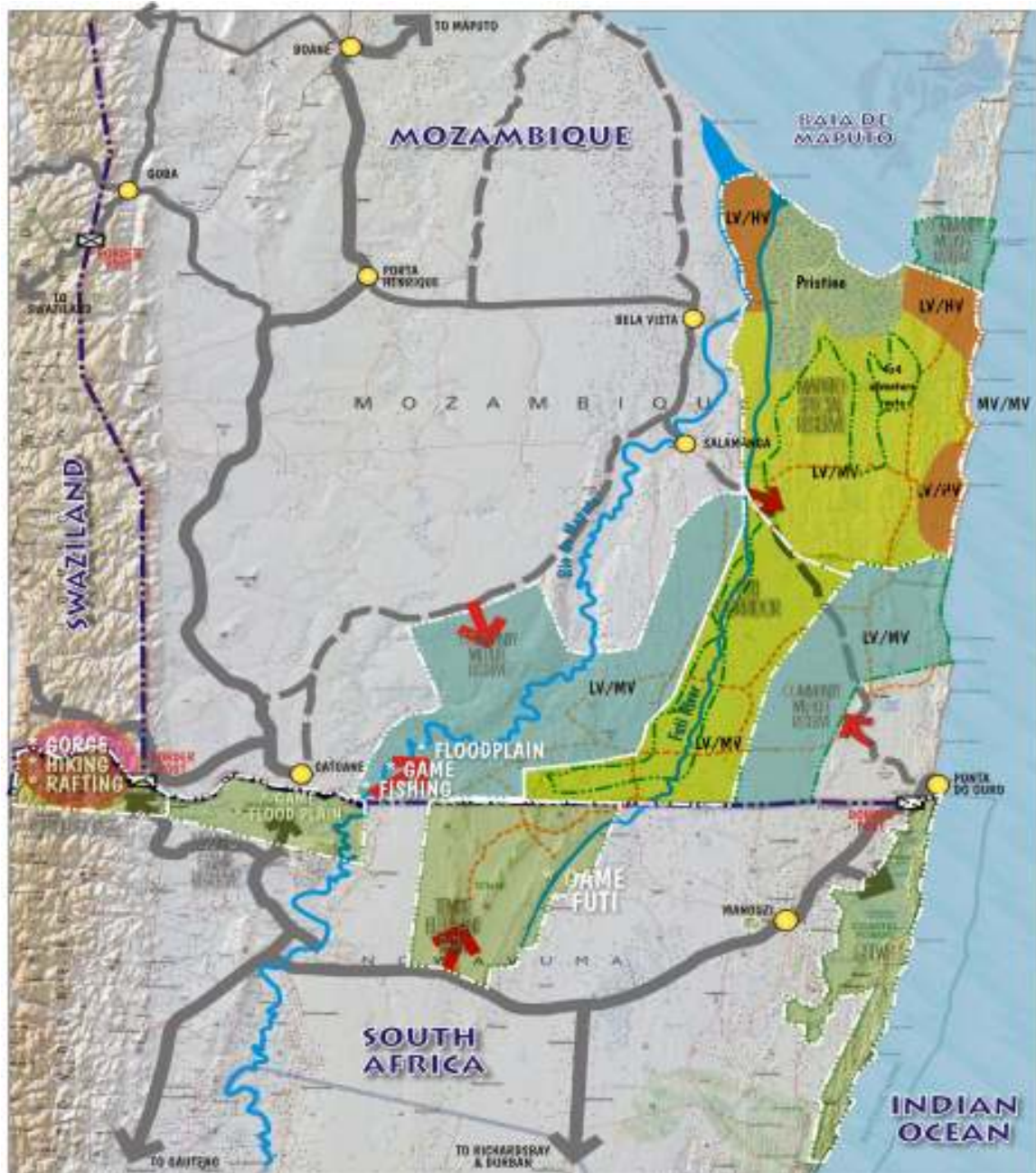
Activities and facilities appropriate for each category of tourism are tabulated below.

NATURE	CATEGORY	ACTIVITIES (terrestrial/aquatic)	FACILITIES
NON CONSUMPTIVE	ECO-TOURISM	Guided self-drive and self- drive game viewing.	Game drive vehicles, interpretive centre, trails, view points etc.
		Hiking trails, special interest trails.	Hides, picnic sites, view sites, boardwalk, huts, trails etc.
		Game management safaris.	-
		4x4 trails and overland safaris.	Game drive vehicles, view point, hides, roads.
		Turtle tours.	Game drive vehicles, interpretive centre trails.
	ADVENTURE TOURISM	Scuba diving	Dive center, boats.
		4x4 Safaris.	Off-road tracks, appropriate signage
	RECREATIONAL TOURISM	River Cruises	Mooring jetties, launching site, storage facilities etc.
		Fishing.	-
	CULTURAL-HISTORICAL TOURISM	Research activities Special interest tours.	
	EDUCATIONAL	Environmental, cultural & Historical Education	Interactive Centre

CONSUMPTIVE	HARVESTING	Harvesting of excess / problem animals. Harvesting of plants for medical, crafts, building material etc.	Harvesting equipment, storage facilities, processing facilities, distribution facilities etc.
		AUXILIARY	LOGISTICAL TOURISM SUPPORT SYSTEMS
		Technical Support.	Stores, workshops etc.
		Communication support.	Retail, banking facilities, curio shops, speciality shops etc.
		Convenience and tourism retail.	Radio, satellite, telephone etc.
		Access.	Gravel/tar roads, airstrips, trails, launching jetties etc.
		Employment.	Labour force
		Staff accommodation.	Staff village
		Law enforcement.	Appropriate security force
		Cross border travel.	Border control (Customs and Immigrations offices)
		Fresh produce provision.	Peripheral Agricultural facilities
		Medical support.	Peripheral Clinic, hospital, mobile clinic, medical aid facilities.

6.3 Circulation

Circulation is indicated in the figure below.



Road

Entry to the TFCA will be:

From RSA:

- Border post at Ponta do Ouro (trans-national entry and exit)
- Tembe and Ndumo (national entry and exit only)

- Usuthu Gorge (national entry and exit only)

From Mozambique

- Futi River Gate on Salamanga Ponto do Ouro road (national entry and exit only)
- Zitundo Gate
- Catuane (national entry and exit only)

From Swaziland:

- Goba (trans-national entry and exit)

Proposed:

- Border post and entry control to TFCA on RSA/Swaziland/Mozambique border west of Ndumo with associated road access (trans-national entry and exit)

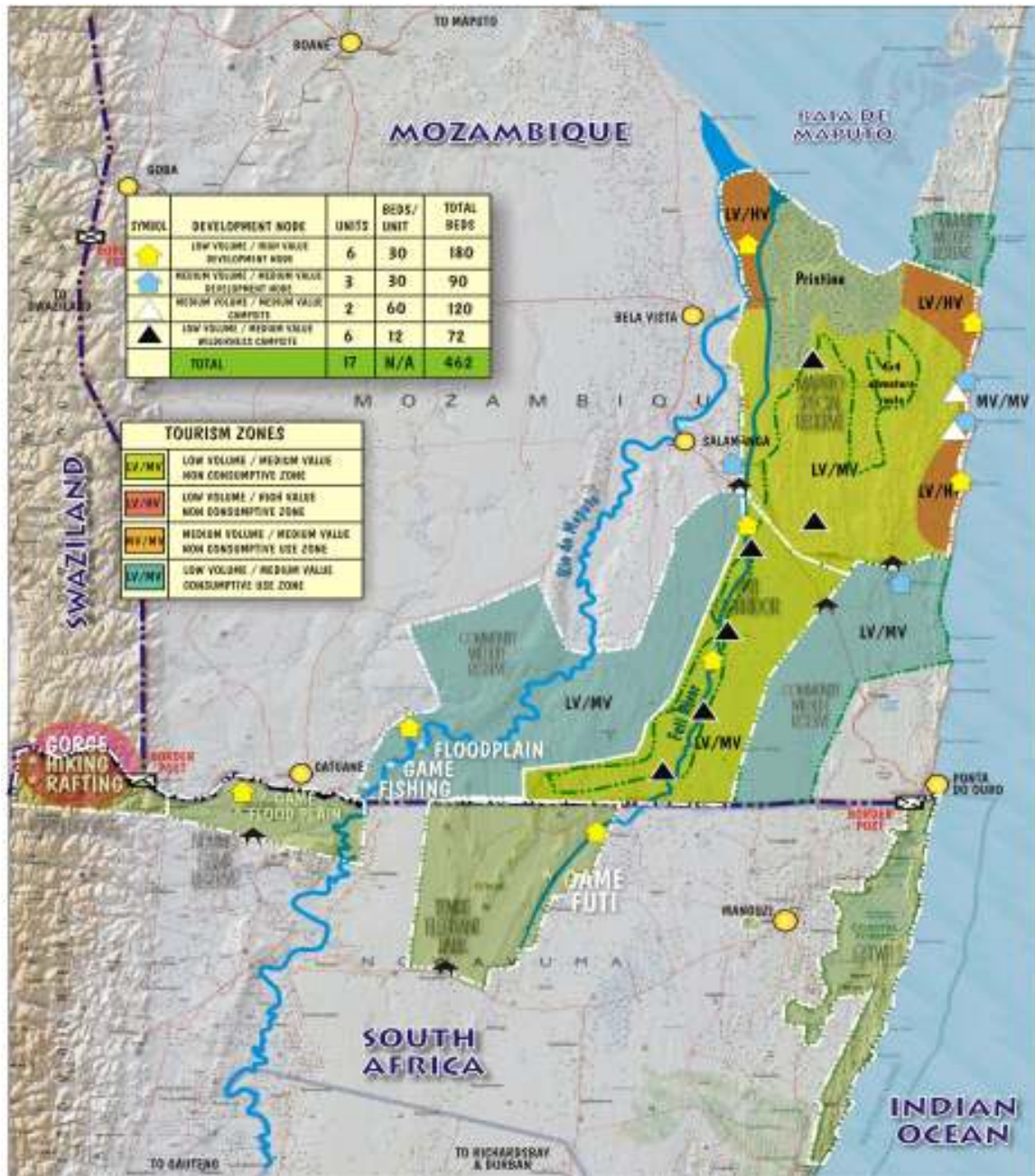
Circulation within the TFCA will be on existing and possibly new roads and tracks (upgrading needs to be investigated).

Air

The proposed airstrip at Santa Maria will provide access to the coastal developments





An airport with immigration facilities is required bordering the TFCA. Ponto do Ouro as a high density development node is probably the best option (requires further investigation)

7. Phase vii: Concept Masterplan



The proposed development nodes are described in terms of visitor carrying capacity.

The development nodes indicated represent the long term Tourism Development Masterplan for the Mozambican component of the TFCA. The roll-out plan for implementation of the tourism development will be defined in Stage 2 & 3.

SYMBOL	DEVELOPMENT NODE	UNITS	BEDS/ UNIT	TOTAL BEDS
	LOW VOLUME / HIGH VALUE DEVELOPMENT NODE	6	30	180
	MEDIUM VOLUME / MEDIUM VALUE DEVELOPMENT NODE	3	30	90
	MEDIUM VOLUME / MEDIUM VALUE CAMPSITE	2	60	120
	LOW VOLUME / MEDIUM VALUE WILDERNESS CAMPSITE	6	12	72
	TOTAL	17	N/A	462

8. Identified Issues to be addressed by IDDP:

These issues are seen as being important for the successful future development of Tourism in the TFCA and Matatuine district as a whole.

- Determine road and border post issues.
- Determine feasibility of commercial agriculture on Rio do Maputo.
- Determine feasibility of community wildlife reserves.
- Determine final boundaries.

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