



REPÚBLICA DE MOÇAMBIQUE
MINISTÉRIO DO TURISMO



Strategic Plan for the Development of Tourism in
Mozambique (2004 – 2013)

Volume I

February 2004

1	Introdução	2
2	Contextualization	4
2.1	Economic Importance of Tourism	4
2.2	An International and Regional Perspective	5
2.3	A National Perspective	6
2.4	Legal and Institutional Framework	8
2.5	Tourism Policy and Strategy	10
2.6	Mozambique Tourism Product	11
2.7	Conservation and Tourism	14
3	Strategy for the Development of Tourism	32
3.1	Analysis of Mozambique's Tourism Potential	32
3.2	Strategic Markets for Mozambique	36
4	Tourism Vision	41
4.1	Tourism Vision for the Future	41
4.2	Using Resources Strengths	42
4.3	Key-factors of Success	42
4.4	Strategic Markets for Mozambique	44
4.5	Strategic Niche Markets for Mozambique	44
4.6	Strategic Source Markets for Mozambique	45
4.7	Linking Products and Markets	46
4.8	Foundation Factors	48
5	Core Implementation Processes	49
5.1	Focus and Spatial Framework of Tourism	49
5.2	Mozambique Regions	50
5.3	Definition of Priority Areas for Tourism Investment	51
5.4	The Dual Approach Towards Development of Tourism Destinations	52
5.5	Development of Strategic Tourism Routes and Circuits	58
6	Implementation of the Strategic Plan	64
6.1	Implementation Framework	64
6.2	Institutional Framework for Tourism Development in PATIs and TFCAs	66
6.3	Integrated Development Planning	67
6.4	Human Resources Development	68
6.5	Marketing	70
6.6	Conservation	72
6.7	Action Plans	76

1 Introduction

The ‘Strategic Plan for the Development of Tourism in Mozambique’ (SPDTM) results from a two-phased process of reflection in the tourism sector in view to establishing the foundations for the implementation of the Tourism Policy and Strategy. The first phase, executed between July 2002 and February 2003, dealt with the policy and strategy review and update, and the second led to the establishment of the present Strategic Plan for the Development of Tourism in Mozambique. A particular aspect that characterized this process is the participatory method followed in the design of these instruments, through consultation and debate at the Government institutions level, and with economic associations, individual tourism operators and the civil society.

This strategic plan highlights the important role that conservation areas can play in tourism promotion and development throughout the country, and emphasises the need of establishing a symbiotic relationship between both areas so that they complement each other in a sustainable way.

The ‘Tourism Policy and Implementation Strategy’, approved in April 2003, replaces the 1995 ‘National Tourism Policy and Strategy’, while the SPDTM follows up and consolidates in one single document the previous strategic plan (“The Strategy for the Development of Tourism in Mozambique (1995-1999)”), a strategic development plan for coastal tourism (“A Planning Framework for Regional Tourism Development in Mozambique”), developed in 1997, and the new approach to Tourism Policy, which combines the binomial product-market and the priority areas for the development of tourism, with relevance to the integration of conservation areas.

The SPDTM builds upon the ‘Tourism Policy and Implementation Strategy’ and serves as the base document in the strategic planning process. It sets priorities, defines products and markets, identifies Priority Areas for Tourism Investment (PATIs) and focuses resources.

The SPDTM defines the areas, the philosophy and the strategic actions, and the background data that led to the formulation of the strategic actions presented. It also assesses market potential, evaluates the tourism resource base and the existing and potential role of conservation for tourism, and details the Human Resources Strategy and the Spatial Framework for Tourism.

The present Strategic Plan comprises (6) six Chapters: the first *presents the background to the Strategic Plan, including the economic importance of tourism* and the role tourism can play in alleviating poverty, the country’s legal and institutional framework, a summary of the national Tourism Policy and Strategy, the current and historic characteristics of Mozambique’s tourism product and the role of conservation in tourism.

The second chapter presents the Strategic Model for Tourism Development, an analysis of key areas of influence, including international and regional tourism trends and their impacts on the future character of tourism in Mozambique.

The third chapter refers to the vision for tourism development, where integrated planning, the Marketing and Development of the Product and Human Resources are identified as key processes for development.

The fourth chapter presents the processes considered as essential for the implementation of the plan and defines the spatial framework that specifies the Priority Areas for Tourism Investment (PATIs) and Conservation Areas, including the Transfrontier Conservation Areas, the Tourism Circuits and Routes.

The last chapter provides a structure for the delivery of the Strategic Plan and defines the areas of intervention, namely the institutional framework, integrated planning, human resources development, marketing, conservation areas and the contents to be observed in the elaboration of the action plans.

The present document covers a ten-year timeframe, from 2004 to 2013, and will be implemented through five-year actions plans, covering the first one the period from 2004 to 2008. The base upon which the implementation process is built is low, so, in order to guarantee a better cost efficiency in the use of the limited resources available, the actions were therefore criteriously selected and prioritised according to the priorities of the government under the general principles outlined in the SPRP and Tourism Policy.

2 Contextualization

Economic Importance of Tourism

Tourism is of growing economic importance around the World. It is an international business that in 2001 contributed 4.2 percent to the Gross Domestic Product (GDP) of the global economy and employed 8.2 percent of the world's economically active population. It is a growing and highly competitive international business. As an economic sector, tourism is one of the few that can deliver growth and employment on the scale required to make a difference in Mozambique.

Tourism is a labour-intensive sector that integrates skills at all levels throughout the sector. It is linked to a diversity of economic sectors, such as transport, agriculture, food and beverage, financial services, construction and craft-making. In many other countries in southern Africa, tourism has proven itself as a key economic sector, which in 2001 accounted for 7.5% of total jobs in Sub-Saharan Africa (WTTC).

However, it is recognized that as an economic sector, tourism has both benefits and disadvantages over the society. The associated impacts are listed in Box 1. With an adequate vision and implementation strategy, the several positive impacts of the industry on the society can be maximized, and the negative ones minimized or even eliminated.

Box 1 - Impacts associated with tourism as an economic sector

Direct benefits associated with tourism as an economic sector include:

Income – in order to satisfy a tourist, a wide range of purchases of services and goods, which occur at different times and in different locations, is necessary. The compounded output is potentially significant to the economy.

Employment – tourism is a labour intensive sector that integrates all levels of skills, ranging from the most sophisticated to the most basic, and that involves all social layers. Given its multiplying effect tourism also impacts positively on employment in other economic sectors.

Conservation – when properly managed, tourism enhances economic viability of protected areas and lessens pressure on the environment.

Investment – the capital intensity of the sector results in a portfolio of investment opportunities for public and private sector.

Infrastructure – the potential and the dynamics of growth, combined with the economic benefits associated with the tourism sector, dictate the necessity to create and invest in infrastructure.

Prestige – international prestige and ultimately a place on the destination "wish list" has positive commercial as well as economic implications.

Creation of small businesses – tourism is linked directly and indirectly to a diversity of economic sectors and therefore creates small business opportunities throughout the economy.

Less desirable impacts, however, can also result from tourism development. These include:

Social impacts – changes in life-style resulting from migration of workers, in culture, from increases in crime rates and even prostitution, etc.

Environmental impacts – irresponsible project development, as well as an influx of tourists in a sensitive environment, can destroy the natural resource base that supports tourism.

Leakages – the occurrence of outbound monetary flows, resulting from the import of goods and services, international promotion and advertising, commissions to foreign sales agents, salaries of foreign personnel, repatriation of profits etc., represent a loss of contribution to the economy.

Over-reliance – tourism is volatile and responds quickly to negative influences like political disturbances, terrorist attacks, natural disasters, etc.

Source: Tourism Policy and Implementation Strategy, April 2003

An international and regional perspective

Travel and tourism are emerging as the leading economic driver of the 21st century. Global arrivals to different destinations have grown from 25 million in 1950 to 682 million in 2001, whilst tourism receipts reached US\$476 billion in 2000, an increase of 4.5 percent on 1999. The Tourism 2020 Vision study published by the World Tourism Organization (WTO) forecasts that by 2020, there will be close to 1.6 billion international tourist arrivals per annum worldwide. These international tourists will spend over US\$2 trillion annually.

Historically, tourism flows have been polarized between and within Western Europe and the United States of America. Europe alone generated over 403 million arrivals in 2000, accounting for 58 percent of international tourism. Over the same period, Africa received 28 million arrivals, making up 4 percent global market share. The gap between the leading destinations of Europe and Americas compared to that of Africa is vast. East Asia/Pacific has continued to show strong growth in outbound tourism and now comprises approximately 15 percent of international arrivals. Africa, the Middle East and South Asia together account for approximately 5% of the international arrivals. Examination of market share by continent and top global tourism destinations highlights this trend as illustrated in the diagrams below.

Figure 1 - Market share by continent

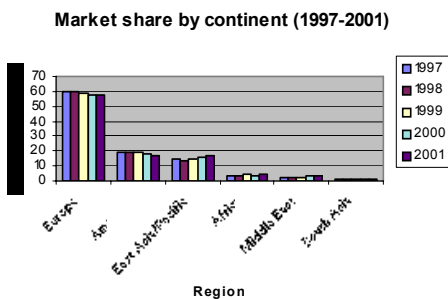


Figure 2 - Top 15 tourism destinations



The increasing affordability of travel and the changing preferences of the global consumer have resulted in a shift in travel patterns from east-west flows to north-south flows. In general, developing countries are receiving an increasing share of international tourists as they improve transportation access, develop tourist attractions, facilities and services and become known as desirable tourist destinations. The G7 countries (i.e. UK, USA, Germany, France, Italy, Canada and Japan) will continue to generate the majority of international tourism demand into the foreseeable future. The East Asia/Pacific region has been the fastest growing over the past several years, enjoying 16 percent of market share in 2000, an increase of one percent on 1999. There is little evidence of tourism growth in Africa – market share has increased by one percent over a period of 15 years.

However, a broad spectrum of tourism product lines exist in Africa, captured in a kaleidoscope of urban, coastal, wildlife and rural settings. The seed capital has been provided by nature to build a vibrant and sustainable economic sector. According to the World Tourism Organisation, tourism arrivals to southern Africa totalled 10.7 million in 2001, approximately 1.6 percent of global arrivals. It is estimated that in the next decade, as the impact of tourism extends over the economy of the region, 1.6 million new jobs will be created. In this context, strongest growth is expected to take place in Southern Africa, with

South Africa expected to receive 30.5 million arrivals by 2020. Average annual tourism growth is forecasted to be 6.5% for Africa and 7.8% for southern Africa; this is well above the world's average forecasted tourism growth of 4.1% annually.

A National Perspective

Mozambique attracted in the region of 400,000 tourists in 2001 through its southern borders; this is, however about 80 percent of the arrivals in Tanzania, a country with similar natural characteristics and product lines, but without the proximity and direct road access from South Africa. This country received in 6 million visitors in 2001 and is forecasted by the WTO to receive 30 million visitors in the year 2020.

The contribution of tourism to national Gross Domestic Product (GDP) is also relatively low. In 2002, tourism contributed 1.2 percent to the national GDP (Ministry of Planning and Finance) and accounts for 0.9 percent of total revenue registered by the country's largest companies in 2001 (KPMG *'The 100 biggest Companies in Mozambique'*). The sector contributes approximately 8% to the national economy in South Africa, an average of 6.9% to GDP of Sub-Saharan Africa, and of 10.2% to GDP of the World (World Travel and Tourism Council). Even allowing for differences in the method of calculation, it is clear that considerable opportunity exists for Mozambique to participate in international and regional growth.

As a prospective investment sector, tourism is doing well however, and accounted for 16% of total investment applications in Mozambique over the last five years (period 1998 – 2002). This makes tourism, with a total investment of 1.3 billion USD, the third largest sector for investment in the country, after industry (33%) and energy and natural resources (18%) (data: CPI).

The Mozambican Government has recognized the opportunities in economic growth and job creation through tourism and therefore created a separate Ministry of Tourism in 2000. The responsibility for Conservation Areas was transferred from the Ministry of Agriculture to the Ministry of Tourism in 2001.

The tourism potential of Mozambique speaks for itself, with 2700 km of tropical coastline, a variety of ecological systems that are rich in species endemism, and a rich historic cultural heritage. However, existing statistical data do not support yet the strong economic contribution tourism can make to the Mozambican economy.

There is significant latitude for growth and Mozambique has plenty of opportunity to participate in the economic and social benefits of the growth in tourism to southern Africa. Engagement with regional partners, reinforcement of spatial patterns, swift response to market requirements, appropriate and targeted investment promotion, emphasis on conservation and alignment and co-ordination of policies, initiatives and resources are essential if the country is to realize its potential for the benefit of the country.

2.3.1 Government's Action Plan for the Reduction of Absolute Poverty

The Government's Action Plan for the Reduction of Absolute Poverty (SPRP) guides actions for the reduction of poverty through development processes. The central objective of the Government is a substantial reduction in the levels of absolute poverty in Mozambique through the adoption of measures to improve the capacities of, and the opportunities available to all Mozambicans, especially the poor. The specific objective is to reduce the incidence of absolute poverty from 70% in 1997 to less than 60% in 2005 and to less than 50% by the end of the decade. The poverty reduction strategy is based on six priorities aimed at promoting socio-economic development throughout the country. These 'fundamental areas

of action' are: (i) education, (ii) health, (iii) agriculture and rural development, (iv) basic infrastructure, (v) good governance; and (vi) macro-economic and financial management. As 'complementary activities' are considered selected social programmes, housing; sectoral policies and programmes that contribute to income generation and job opportunities (business development, fisheries, mining, industry and tourism); programs to reduce vulnerability to natural disasters; and policies that support sustainable growth (transport and communications, technology, environmental management).

The SPRP views human development and broad-based overall growth as interdependent. Policies promoting rapid and balanced growth that benefit the poor and provide the best chance for creating accelerated and sustainable progress are directed at reducing poverty. Investment, productivity and job creation are seen as key drivers for overall growth and it is the Government's responsibility to create a favourable environment through investment in human capital, the development of infrastructure, programmes to improve the quality of public institutions and policies for macro-economic and financial management. Complementary actions that will contribute to an improved investment climate and promote efficiency in specified areas will also be promoted.

Tourism is seen as a "complementary sector" that cuts across many of the primary priorities and that has significant potential for contributing to the economic development of the country. Particular reference is made in the SPRP to the role of tourism in stimulating demand for locally produced goods, thereby contributing to wider employment opportunities and to appreciating the importance of creating a culture of 'domestic tourism' as a strategy in increasing the overall income from tourism. The action programmes for these goals are: (i) strengthening the sector's policy and strategy and action plans; (ii) stimulating the creation of local businesses for tourism support and the development of linkages among them in order to reduce imports as much as possible; (iii) promoting the sector to domestic and international tourists; (iv) facilitating tourist access to the country; and (v) professional training.

2.3.2 The Role of the Tourism Sector in Poverty Alleviation in Developing Countries

The following points reflect the potential role of tourism in the economic development process in developing countries:

- Tourism can make a significant contribution to the economies of poor countries. 80% of the world's poor (below \$1 a day) live in 12 countries. In 11 of these, tourism is significant and/or growing. Of the 100 or so poorest countries, tourism is significant in almost half of the low-income countries, and virtually in all of the lower-middle income countries (accounting for over 2% of GDP or 5% of exports) (DFID, 1999).
- According to the World Travel and Tourism Council (WTTC), tourism arrivals to developing countries have grown an average of 9.5% annually since 1990, more than twice as fast as growth in tourism worldwide over the same period.
- According to the WTO, in the last decade tourism expenditures have increased in the world's developing countries by 132.9%, and in the least developed countries by 154.1%, a much higher percentage increase than in the OECD (64.3%) and the EU (49.2%).
- According to the UN Commission for Sustainable Development's Agenda 21, tourism absorbs more women and unskilled labourers than other sectors, and is economically significant in the vast majority of low-income countries. It is particularly important for women, as employment in the tourism sector is more flexible than the traditional manufacturing or agriculture sectors, and there is an expanded "informal sector", allowing for economic activity consistent with family life. Tourism jobs are often healthier and safer than jobs in sugar cane, mining, logging and manufacturing, and with

the absorption of untrained and unskilled workers, there is a good opportunity for human resources development through training and the upgrading of skills and capacities.

- Tourism is a very important economic catalyst, as visitors spend money directly in hotels and outside of hotels, generating direct and indirect employment and revenues throughout an economy. In terms of indirect impact, the IFC estimates that tourists will spend between 50%-190% of hotel expenses in the local economy in other goods and services. Tourism impacts the construction industry, agricultural industries, craft-making and traditional cultural attractions, banking, fishing, manufacturing, insurance, telecommunications, medical, security and retail services.
- According to the IFC, tourism is labour intensive with an average of 1.2 to 1.5 direct employees per hotel room in developing countries, depending on the type of hotel and local skill levels. It has been estimated that the indirect job benefit can be between 3 and 5 employees per hotel room.
- Tourism is an agglomeration of sectors and therefore creates opportunities for small businesses and the informal market throughout the economy. Little capital is required to get started in many types of small businesses.

Legal and Institutional Framework

2.4.1 Legal Framework

Tourism relates to a multitude of sectors and touches on many legal instruments and laws that provide the legal framework for investment in tourism.

Since 1994 the Government of Mozambique has adopted a number of policies and passed legislation for improved natural resources management, which play an important role in tourism promotion. Those with direct relationship with the tourism sector are:

- Tourism Law (2004)
- Tourism Policy and Implementation Strategy (2003)
- National Forestry and Wildlife Policy and Strategy (1995)
- Forestry and Wildlife Law (1999)
- Land Law (1997)
- National Environmental Management Programme (1995)
- Environmental Framework Law (1997)
- Fisheries Law
- Investment Law

In order to ensure the effective co-ordination and integration of sectoral policies and plans related to environmental management at the highest level, a National Commission for Sustainable Development (NCSD), linked to the Council of Ministers, was created in 1997 by a provision in the Environmental Law.

On the other hand, several actions associated with tourism projects and undertakings are subject to the Environmental Impact Assessment Regulations, which specify that all programmes and projects that may affect, directly or indirectly, sensitive areas be subject to an EIA. Included are conservation areas and zones of archaeological, historical and cultural value that should be preserved.

Private sector activity is considered the prime engine for economic growth and is directly related to the increase of employment and overall poverty alleviation in Mozambique.

Adequate legislation and its implementation are a key factor for the promotion of investment in the tourism industry. The Investment Law and legislation regarding fiscal benefits, profit repatriation and employment of foreign employees are also considered essential in the context of the legal framework for tourism.

A proposal of a new tourism law, to come into force this year, aims to update the concepts currently used in the tourism industry, and to establish ethical principles for a sound development of tourism in the country, including the need of discouraging any attempt of child sexual tourism, social discrimination, etc.

2.4.2 Institutional Arrangements

In order to promote tourism development in the country, the Ministry of Tourism was established in 2000 through Decreto Presidencial n° 1/2000 of the 17th of January 2000, while the Decreto Presidencial n° 9/2000 of the 23rd of May 2000 defined its areas of responsibility that include the administration, direction, planning and execution of policies in the following areas: tourism activities; hotel and tourism industry and related activities; and conservation areas designated for tourism.

To realize its areas of responsibility and its mandate, the Ministry of Tourism is organized according to the following activity areas:

- a) Tourism activities;
- b) The hotel and related industry;
- c) Conservation areas designated for tourism;
- d) Tourism inspection.

At national level, the Ministry of Tourism has the following bodies: National Directorate for Tourism (DINATUR), National Directorate for Conservation Areas Designated for Tourism (DNAC), Tourism Promotion Directorate (DPT), Planning and Co-operation Directorate (DPC), General Inspection of Tourism (IGT), Human Resources Department (DRH), Administration and Finance Department (DAF), Legal Department (DJ) and the Transfrontier Conservation Areas Coordination Unit (ACTF).

At local level, the Ministry of Tourism is represented by the Provincial Directorates of Tourism, with representative directorates or offices at district level expected to be introduced in the future. In January 2004, the Ministry of Tourism established Provincial Directorates of Tourism in all the provinces, except for Maputo city and province. The institutions governed by the Ministry of Tourism are:

- a) National Tourism Fund (FUTUR), responsible for the promotion of the development of tourism through marketing, technical and financial assistance to local operators, training and provision of assistance on undertakings of tourism interest.
- b) Hotel Escola Andalucia, offering basic training in the areas of front office, food and beverage and housekeeping.

MITUR currently employs about 600 people; this includes central staff as well as staff in the Provincial Directorates and in the National Parks and Reserves (400).

National Tourism Policy and Strategy

Through Resolution n° 14 of the 4th of April 2003, the Government approved the ‘National Tourism Policy and Implementation Strategy’, which sets the direction for future tourism growth and development.

The Tourism Policy details a set of General Principles, Objectives of Tourism and Priority Areas for Intervention.

The Policy deals with the strategy for its implementation, which consists of a number of guidelines aiming at guiding the implementation of actions towards the achievement of the objectives and principles established in the Tourism Policy, through key strategic actions.

A key aspect in the new tourism policy is the emphasis placed on the effective involvement of district authorities and local communities. This realization has serious implications for governance processes and human resources capacity development. Other key policy shifts reflected in the new tourism policy are the recognition of the real value of Conservation Areas in the development of the tourism sector, the emphasis placed on the role tourism can play in poverty alleviation and a new approach towards product development targeted towards a league of market segments.

Box 2 – Priority areas for government intervention

The Tourism Policy defines the following principles:

- Integration of Tourism in the general processes of policy and strategy planning in the country's development;
- Assumption of the responsibility of the Government at the National, Provincial and Local level for the definition and control of the quality development patterns of Tourism;
- Planning and coordination of the development of markets, tourism products and infrastructures in the country;
- Establishment of an institutional framework for planning and control mechanisms for the active participation in tourism development;
- Recognition of the private sector as a driving force in the development of the industry;
- Awareness creation about the importance of tourism and the value of natural and cultural heritage;
- Training and skill-enhancement of human resources as a way of improving the quality of tourism;
- Promotion of the effective involvement of the community in the development programmes.

Box 3– Tourism Objectives

The overall Tourism objectives are based on three dimensions: Economic, Social and Environmental

To develop and position Mozambique as a world-class tourism destination;
To contribute to employment creation, economic growth and poverty alleviation;
To develop sustainable and responsible tourism;
To participate in the conservation and protection of biodiversity;
To preserve cultural values and national pride; and
To enhance the quality of life for all the people of Mozambique.

Source: Tourism Policy and Implementation Strategy, April 2003.

Formatted: Bullets and Numbering

Box 4- Áreas Prioritárias para Intervenção e Actuação

■ Integrated Planning	■ Tourism Promotion
■ Access to Land for Tourism Development	■ Human Resources Development and Training
■ Infrastructure and Public Services	■ Community Involvement
■ Sustainable Tourism	■ Social Development
■ Conservation Areas	■ Financing
■ Tourism Product Development	■ Priority Areas for Tourism Investment
■ Valorisation of Cultural Heritage	■ Regulation and Control of Quality

Source: *Tourism Policy and Implementation Strategy, April 2003*

Mozambique's Tourism Product

2.6.1 Historic Perspective

Historically, Mozambique was considered one of the premier tourism destinations in Africa and the sector played an important role in the economy of the country. In 1973, Mozambique welcomed close to 400,000 tourists, mostly from South Africa, Zimbabwe and Portugal. Tourism was developed around three themes – the beaches, the wildlife and the dynamic environment offered by the urban centres – and was mainly concentrated in the southern and central zones of the country. Pristine beaches, warm sea, boating and fishing opportunities, contributed to an experience that was unique in Southern Africa. The European continental ambience and African Mediterranean cuisine and the charisma of the cosmopolitan cities of Maputo and Beira were an important component of the tourism experience. The wildlife product was very well developed, with Gorongosa National Park considered one of the prime game parks in southern Africa, and the hunting in the central coutadas (hunting areas) of an international standard.

The change in security after 1973 resulted in a rapid decline in visitor numbers and performance of the sector. The tourism infrastructure fell rapidly into decline due to the war and poor management, and wildlife resources, especially large mammal species, were virtually decimated.

The signing of the peace accord in 1992 initiated the start of the recovery of the tourism sector. Since the mid 1990s the economy has experienced substantial growth and a number of business hotels have been developed in Maputo. Demand for beach based leisure tourism stimulated the development of accommodation in the southern resorts of Ponto do Ouro, Inhambane, Bilene, etc. Investments predominantly comprised of cottages, campsites and self-catering accommodation, which were targeted at regional markets. More upmarket small-scale development has emerged on the islands of the Bazaruto Marine National Park and on the mainland in Vilankulos. More recently investors are beginning to show an interest in the northern regions, mainly Pemba, the Quirimbas archipelago and Nacala.

In 2001, Mozambique attracted in the region of 400,000 tourists through the southern borders, approximately equivalent to the numbers visiting during the colonial period. Mozambique offers a total of 12,000 beds, of which approximately 5,000 beds are of a luxury standard or international 3 star and upward. In contrast, the City of Cape Town has approximately 30,000 beds and Mauritius in the region of 19,600 beds.

2.6.2 Regional Profiles

Mozambique can be divided into three geographical regions: the North, with Cabo Delgado, Nampula and Niassa provinces, the Centre, with Sofala, Manica, Zambézia and Tete

provinces, and the South, consisting of the provinces of Maputo, Maputo-Cidade, Gaza and Inhambane. The geo-physical characteristics, socio-economic development and tourism profiles differ between the three regions and distances between them are significant.

Regional Profile: South

Tourism is concentrated in the South of the country. Maputo-Cidade, Maputo Province, Gaza and Inhambane share a capacity of 50 percent of total registered establishments and 65 percent of total beds. 60 percent of total room nights in 2001 were sold in Maputo-Cidade. The region experiences the highest socio-economic development levels and has the best infrastructure in the country. Business tourism is concentrated in Maputo, while Inhambane Province hosts the largest number of leisure accommodation facilities and currently receives the largest number of leisure tourists. Development along the Southern coastline has, over the last few years, been uncontrolled and the Provincial Governments have decided to take steps in order to change the situation by creating a platform for the sustainable growth of tourism.

Maputo is the primary gateway to Mozambique for purposes of business and leisure. The accommodation supply in the capital has been growing at a relatively fast pace since the mid nineties. At the end of 2002, 10 hotels offered a total amount of 1,300 rooms, compared to 6 hotels with just over 750 beds about five years earlier.

Leisure tourism is developing in various spots in Maputo, Gaza and Inhambane provinces. Development centres include Ponta do Ouro and Ponta Malongane for water sports, Macaneta, Bilene and Xai Xai for family tourism, and the coast of Inhambane is a mixture of the above-mentioned characteristics. Most developments have occurred in Inhambane Province, with development nodes emerging in Vilankulos/Bazaruto and in the coastal zone close to Inhambane town. With the exception of the Vilankulos region, tourism infrastructure comprises mainly of medium level camping and self-catering facilities.

The development of the Greater Limpopo Transfrontier Park will further anchor tourism development in the South. The transfrontier park includes Kruger National Park in South Africa, Gonarezhou in Zimbabwe and the Limpopo National Park in Mozambique. It is likely to be some time before the Park is truly operational for photo safaris but opportunities exist for places like Massingir to link immediately to Kruger National Park and derive benefit from its brand and infrastructure. Maputo Special Reserve and Lebombo TFCA in the southern region of Maputo province offer other opportunities in eco-tourism.

Regional Profile: Centre

The centre has historically played an important role in tourism in Mozambique. Gorongosa National Park was one of the most famous game parks in Southern Africa and hunting in the central outcadas was amongst the best in the world. The armed conflict affected the whole country but the central area was particularly badly impacted. The Marromeu Buffalo Reserve, once renowned for its population of over 20,000 buffalos, has today only a few hundred left. Wildlife in Gorongosa was decimated. The stock is however recovering and small game and antelopes are once again frequently observed. The number of "Big Five" animals in the parks is low and safaris to view these animals are unlikely to be possible in the near future. Within a period of 15 to 20 years the Park can, if well managed, be restored to its previous strength.

Beira is the second city of Mozambique and an economic centre of regional importance. Its port plays an integral role linking central Mozambique to Zimbabwe and other neighbouring countries in the central region. Growth of tourism in the city has been based on commerce and business. The commercial importance of Beira has been emphasised in regional planning by the establishment of the Beira Spatial Development Initiative. In colonial times the

beaches of Sofala were a major attraction. They were frequented mainly in combination with a visit to Gorongosa or one of the coutadas. Demand was drawn largely from nearby Zimbabwe (Rhodesia at that time). In more recent times, Zimbabweans have again frequented the beaches of Beira and Savane, although lack of infrastructure meant that many moved down the coast to Inhambane province. The current economic situation in Zimbabwe has however seen a significant decrease in the number of beach tourists.

The central region accounts for over 18 percent of all room nights generated all over the country. Almost one out of every two room nights outside of Maputo Cidade is spent in the central region. Movement is mainly business and trade related and is concentrated in Beira and in trade centres near the borders with Zimbabwe, Zambia and Malawi. Beira has 2 hotels of a reasonable standard though the price/quality level is low compared to Maputo. Manica has no business standard accommodation. Quelimane's former top hotel is under state management and offers a reasonable but expensive service. In Tete, the former "luxury" hotel is privately managed but with no running water and only parts of the hotel have been renovated – it remains very basic. In general, options are limited and prices are high. Alternatives to the previously state owned hotels are hard to find and very few self-catering options exist. All cities have a few reasonably priced 'pensões', but these are not of internationally acceptable standard. Hotels in all central provinces report difficulties in finding quality staff. Buying consumables is also very difficult and expensive, particularly in Tete and Zambezia.

Regional Profile: North

The North of the country is Mozambique's relatively unspoilt 'tourism jewel'. The rich historical past of Ilha de Mocambique and Ibo, the marine life and beauty of possibly one of the most beautiful archipelagos in the world, the Quirimbas, the wilderness of Niassa Reserve and the unique biodiversity of Lake Niassa provide a tourism experience exceptional in both quality and diversity. The proposed TFCA link between Niassa Reserve and Selous in Tanzania would provide one of the largest and most spectacular game experiences in Africa. Nature has provided an excellent platform for tourism. Access to and within the North is however difficult and tourism has not developed to any great extent in recent years.

The provinces of Nampula, Cabo Delgado and Niassa share less than 25 percent of the total registered accommodation units and less than 10 percent of total room nights spent in 2001. Niassa, the least developed province of Mozambique, has the lowest capacity of 15 units and 280 beds. Nampula, with 40 units and over a 1,000 registered beds, is above national average, while Cabo Delgado has average numbers with 27 units and just above 800 beds. The North has, however, been "discovered" by investors. A deluxe five star beach hotel has recently opened in Pemba, as well as a small luxury resort in the Quirimbas islands. Government sources report significant interest from developers and speculators in new hotel and resort projects in the Quirimbas and coastal zone of Pemba.

Tourism is mainly concentrated in Nampula, Nacala and Pemba. The Nacala Corridor SDI is at the forefront of development in the region. It links Nacala and Nampula to Lake Niassa and into Malawi through air, road and sea infrastructure provision. The emphasis placed on the area at government level has already resulted in an increased hotel room demand in Nampula and Nacala and an increasing choice of accommodation is available while further developments are under construction.

The North has remained relatively unscathed by the type of tourism projects being developed in the South of the country. It now provides perhaps the best opportunity to plan integrated and sustainable tourism given its relative isolation, overall product quality and considerable infrastructure requirements. There are already signs that time is short in this regard and that action will have to be taken to maximize long-term opportunity and avoid the environmental and social issues that have arisen in the South.

2.6.3 Regional Integration (Southern Africa)

The image of southern Africa as a tourism destination still focuses very much around wilderness, where the 'big-five', eco-tourism and nature based experiences play an important role.

The SADC region has experienced relatively consistent growth in tourism in recent years. The future growth of the SADC region is projected to be significantly higher than in the rest of the world. A tighter integration between nations in southern Africa is considered by many as a pre-condition to strengthen the position of continental Africa in the face of ever increasing worldwide competition in the travel and tourism market. The international trends towards multiple country visitations only further justify the move towards regional integration.

Southern Africa has recently witnessed the creation of various cross-border initiatives strengthening regional cooperation and providing exciting opportunities for conservation and tourism.

Transfrontier Conservation Areas (TFCAs) play an important role in the establishment of a stronger co-operation relationship. TFCAs comprise regions across the borders between various countries (Lebombo, Greater Limpopo TFCA, Chimanimani), where the different component areas have different forms of conservation status, such as private game reserves, communal natural resource management areas and hunting concessions. TFCAs can play an important role in speeding up tourism conservation areas development in Mozambique.

However, TFCAs are not an end result, and greater focus must be placed on their role in the tourism landscape, with emphasis on the linkages between the TFCAs and the coast (bush-beach linkages) in order to maximize impact and create a platform for investment attraction and growth.

It is strategically important for Mozambique to link into the more developed tourism markets in neighbouring countries, to promote Mozambique as an add-on destination to these countries (mostly South Africa but also Swaziland and, once recovered, Zimbabwe and the neighbouring countries in Northern Mozambique, including Zambia, Malawi and Tanzania) and to make effective use of infrastructure in these countries (mainly international airports, travel agencies and tourism operators).

2.7 Conservation and Tourism

In 1948, the World Conservation Union (IUCN) was created, with membership constituted by governments or government institutions and NGOs, universities and scientific research institutions. The IUCN facilitated the formulation of global conservation approaches that centred on the identification of areas of special ecological or biodiversity value. IUCN defines "protected area" as a portion of land and/or sea especially dedicated to the protection of biological diversity and of natural and associated cultural resources, and managed through legal or other effective means (IUCN 1994).

The sub-Saharan African countries own a tourism niche market known as "nature-based tourism" supported by conservation areas. The most benefited are the Eastern and Southern Africa countries, which have a wide variety of wildlife. In their conservation areas network attraction is not only limited to the charismatic mega-fauna, but it also extends to the whole wildlife that can be found in its natural state. Tourists are therefore attracted to conservation areas due to their natural state, varied wildlife and the rich cultures endowed with socio-cultural traditions. The word "safari" is used for promotion in international and domestic markets to mean the "adventure based tourism" that has captured the interest of many tourists.

Africa is also well known for its compelling images of tropical life, palm fringed beaches and seas teeming with life. Those who aspire to visiting Africa, particularly for leisure and

adventure, are strongly motivated by a desire to experience Africa in its natural and pleasant state. It follows that if African countries in general, and Mozambique in particular, wish to compete in the tourism international market, they will have to safeguard and manage their natural assets in ways that create desirable tourist products. In doing this and making these products accessible to tourists, they have to ensure that the assets are not changed by tourism and lose their appeal. Conservation is the mechanism by which government and civil society protect their natural assets with view of a sustainable use, and tourism is one of the most important uses of these natural assets. So, it is clear that tourism and conservation cannot be separated.

Over the past century, increasing attention has been paid to the development of participatory conservation management systems, including the creation of protected areas, as natural resources have become depleted.

Most governments in the world have found that it has become difficult to afford the costs of managing protected areas (PAs), and have sought alternative management frameworks to meet these challenges, given the demands of providing for health, education and development. The acceptance of the principle of devolving decision-making processes to the PA management authorities allows the use of revenue derived from the sustainable use in the daily management of these areas.

2.7.1 Protected Areas Management in the Global Context

The World Conservation Union (IUCN) established criteria for designating conservation areas into categories according to their uses and management objectives. A key intention of the development of this system was to encourage governments to develop systems of protected areas with management aims tailored to national and local circumstances. There are six such categories allowing for certain levels of use based upon the degree, type and intensity of human activities that may take place in each of the categories.

Table 1 – Categories of protected areas according to their management objectives¹

Category	Purpose of Protected Area	Names of the PAs
Category I	Managed mainly for science or wilderness protection	(a) Strict Nature Reserve (b) Wilderness Area
Category II	Managed mainly for ecosystem protection and recreation	National Park
Category III	Managed mainly for conservation of specific natural features	Natural Monument
Category IV	Managed mainly for conservation through management intervention	Game Reserve
Category V	Managed mainly for landscape or seascape conservation and recreation	Protected landscape or seascape
Category VI	Managed mainly for sustainable use of natural ecosystems	Managed Resource Protected Area

The protected area management categories system is based upon the primary objective of management of specific activities, such as scientific research, tourism and recreation or the sustainable use of resources.

¹ According to IUCN's categories.

Mozambique is a member of IUCN and its conservation areas fall under three IUCN Categories: National Parks (Category II), National Reserves (Category IV) and Hunting Blocks (Coutadas) (Category VI).

2.7.2 Community Based Natural Resources Management (CBNRM)

Natural resources have generally been seen to be property of the state in most countries. Protected areas have historically been created to protect key elements of these resources, using land that was formerly owned or occupied by local communities. The exclusionary nature of classical protected area management approaches practiced through the early and mid 1900s in many of the colonized countries, invariably led to tension and conflict between the protected area managers and the surrounding communities. The communities' demands for access and use rights to the natural resources and land in those areas, as well as those on their own communal lands, forced PA managers to develop large law enforcement bodies, at great cost, to control the process. The management of these demands for access to and use of these resources eventually led many governments around the world to realize that the costs of such control measures could not be borne by the state, and powers to manage and use natural resources began to be devolved to communities under certain criteria and limitations. Social forestry movements in Asia initiated the movement to what has now become to be known as CBNRM. This is a well entrenched, yet evolving approach globally to solving modern development and conservation problems with new and innovative solutions.

2.7.3 International Conventions and Treaties

Excessive trade, the overexploitation of species and the conversion of natural habitats to agriculture worldwide, has prompted the necessity to have in place mechanisms to safeguard species and biodiversity through international agreements and treaties. Conservation is most directly affected by agreements such as: the Convention on Biological Diversity (CBD); the Convention on International Trade on Endangered Species of Flora and Fauna (CITES); the Convention on Migratory Species (RAMSAR); the United Nations Convention to Combat Desertification (UNCCD); and The International Whaling Committee. In addition two other agreements, the World Heritage Convention on Natural and Cultural Properties (WHC) and the Man and the Biosphere Programme (MAB) also apply to many conservation processes globally.

Mozambique is a Party to CBD, CITES, UNCCD and the World Heritage Convention (WHC) and it is in the process of joining the RAMSAR Convention.

2.7.4 Global Approaches and Principles Inherent to Conservation

A number of other globally recognized concepts also influence the nature of conservation worldwide. Foremost amongst these are the concepts of 'sustainable use' and 'ecosystems management'.

The concept of sustainable use defined worldwide recognises that both consumptive and non-consumptive use of biological diversity are fundamental to the economies, cultures, and well-being of all nations and peoples, and that 'use', if sustainable, can serve human needs on an ongoing basis while contributing to the conservation of biological diversity.

The ecosystem approach and sustainable use share many elements but differ chiefly in their respective goals. Sustainable use can usefully be seen within the framework of the ecosystem approach. The goal of sustainable use represents an intermediate goal, valuable in itself, but also one that can contribute to the broader goal of maintaining ecosystem processes.

2.7.5 Emerging Global Trends in Conservation

Internationally and within the southern African region in particular, there are a number of best practice trends that have been emerging over the past two decades, which provide guidance to modern approaches to the management of conservation processes:

- Conservation is increasingly being conceptualised as an ‘incentive-driven business’ that manages the production, supply, access to and use of goods and services deriving from conservation areas;
- Governments are increasingly focusing on policy and regulation rather than on operations and implementation;
- The private sector (including community enterprise) is increasingly being accepted as the ‘implementer’ of conservation processes – often in partnership with communities;
- Globally, governments are decentralizing, bringing decision making closer to citizens and other stakeholders;
- Governments are increasingly seeking collaborative management in one form or another;
- In developing countries particularly, the urgency for welfare increasingly directs national budgets away from conservation, requiring conservation areas and processes to become self-sustaining; and
- Biodiversity and ecosystems-based conservation requires strong, visionary, and effective government policies and regulations to ensure sustainability for the benefits of today and tomorrow’s generations.

2.7.6 The Regional Perspective

Southern Africa is recognized globally for its pragmatic and visionary approach to conservation. The region has contributed significantly to the development of the concepts of sustainable use and ecosystems management as well as to CBNRM. The region has also contributed to the technical evolution of the ‘science’ of Protected Area Management (PAM) globally through its innovative and visionary approaches to management and governance.

South Africa pioneered some of the earlier forms of management frameworks (parastatals) in the Kwa-Zulu Natal and North West Parks Boards. As parastatal organizations they have been able to respond more efficiently and effectively to their clients and to capitalize more quickly on entrepreneurial opportunities, as a result of:

- Being given financial autonomy and powers of attorney: allowing the organisation to use and dispose of its own income to finance part of its services, thereby reducing its dependency on state budgets;
- Being afforded flexibility of decision making: where decision making powers are delegated to an organisation, management is able to respond more quickly, efficiently and effectively to environmental and market opportunities, thus allowing the conservation officials to be seen as more caring and responsive to the needs of communities;
- Being able to enhance staffing capabilities: the ability to structure, grade and position staff independently of Public Service Commission processes allows an organisation to obtain high quality staff through competitive, commercial free-market processes, and through this to develop other staff to higher levels of competence. The competitive remuneration and benefits offered also allow management to keep staff motivated and to be productive and efficient.
- Being required to have public accountability: the organisation is subject to public accountability and auditing through the legislature to ensure proper control over public funds, and having penalties imposed for lack of performance.

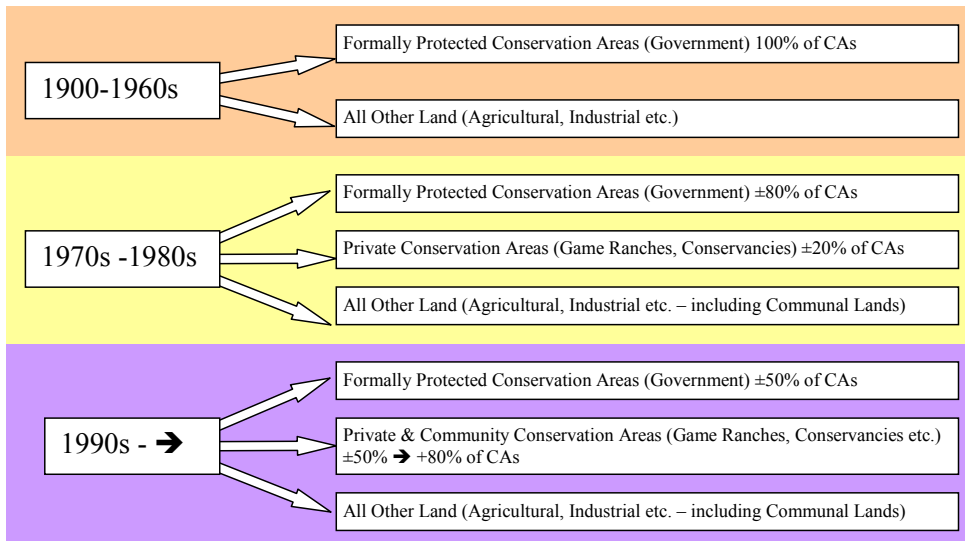
Conservation processes in Zimbabwe, Namibia, Botswana, South Africa and Tanzania have led the way in devolving powers and rights over natural resources to lower levels of governance, and in some cases to communities themselves, through processes such as CAMPFIRE, LIFE and the BNRMP. The devolution of ownership rights for wildlife to land owners in South Africa during the late 1980s precipitated the almost wholesale conversion of cattle ranches in the Limpopo Province to wildlife ranching, creating a new industry based upon hunting and nature-based tourism that is currently worth over 10 million rands annually in that one province alone. CBNRM programmes in Zimbabwe, Namibia and Botswana have allowed many communities to re-gain the rights to manage and control the use of, and access to natural resources on their land, providing benefits streams that have meaningfully increased their annual per capita incomes over the past decade. Community managed hunting concessions on communal land in Zimbabwe have earned some communities hundreds of thousands of dollars over the past decade.

2.7.7 The New Paradigm for Conservation Areas

“New solutions for modern problems.”

The new paradigm for protected areas recognizes that areas set aside for conservation have the dual purpose of being managed for conservation, as well as for socio-economic objectives. Previously conservation areas were established primarily for the preservation of wildlife populations or certain species, and in some cases for spectacular landscapes. However, they are nowadays increasingly being established to enhance development objectives and create employment and entrepreneurial opportunities for neighbours. Instead of being managed mainly for visitors and tourists, they are now managed with local people more in mind.

Figure 3 – Trend showing growth of private sector and communal conservation areas over the past decade



The new paradigm for conservation areas has developed more inclusive approaches to the management of natural resources and protected areas, as may be seen in Table 2.

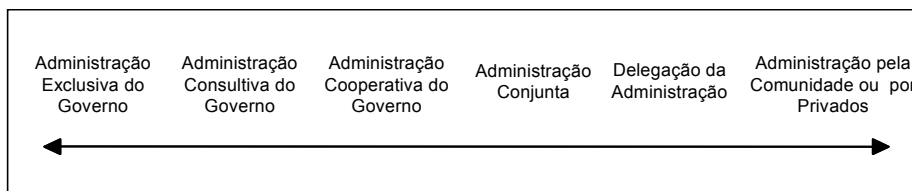
Table 2 - Conservation areas management trends

TOPIC	Past - Conservation Areas were:	Future - Conservation Areas will be:
Objectives	Exclusionary and set aside for the preservation of wildlife populations, species and spectacular landscapes/scenery Managed mainly for visitors and tourists Valued as wilderness Focused on protection and law enforcement	Created and managed with ecological, social and economic objectives in mind Managed with local people in mind Valued for cultural importance of so – called “wilderness” Self regulating with consultation and collaboration between partners
Governance	Run by central government	Run by many partners, primarily the private sector and communities
Local people	Planned and managed against people Managed without regard to local opinions	Run with, for, and in some cases by local people Managed to meet the needs of local people
Planning approach	Planned, developed and managed as separate units	Planned as part of local, national and international system Developed as networks linking protected areas and buffer zones by green corridors
Perceptions	Land and resources viewed primarily as a state owned national asset – restricted access and use rights Viewed only as a national concern	Viewed also as a community asset – devolution of access and use rights Viewed also as a local and international concern (continuum of rights and obligations)
Management techniques	Managed reactively with a short timescale Managed in a technocratic way	Managed adaptively in a long term perspective Managed in a business/commercial manner, with political considerations
Finance	Paid for by taxpayer	Paid for by beneficiation of the resources being managed and protected
Management skills	Managed by scientists and natural resources experts	Managed by commercially orientated staff, guided by scientists and experts Valuing multi-skilled individuals, and drawing on local knowledge

2.7.8 Emerging Governance Approaches for Conservation Systems

Governments in southern Africa have used six types of approaches to the governance of natural resources and conservation areas over the past two decades, representing a continuum of the devolution of power, as shown in Figure 4.

Figure 4 - Continuum of governance approaches to conservation areas (From Graham et al. 2003)



The characteristics of each of these forms of governance or management approach are outlined in Table 3.

Table 3 - Description of Approaches in the Continuum of Management of CA

Nr.	Approach	Criteria
i	Government Sole Management	Accountability for management of the conservation area rests solely with a government agency that does not have any obligation to involve other stakeholders as appropriate prior to making decisions.
ii	Government Consultative Management	Accountability for management rests with a government agency that normally consults and may have an obligation to consult other stakeholders as appropriate prior to making decisions.
iii	Government Cooperative Management	Accountability for management of the conservation area rests with a government agency that has a requirement to cooperate with other identified stakeholders in managing the conservation area and in making decisions.
iv	Joint Management	Accountability for management of the conservation area rests jointly with a government agency (or agencies) and representatives of other non-government stakeholders who together collaborate in making decisions.
v	Delegated Management	Accountability for management of the conserved area has been delegated to one or more clearly designated organizations (these could include local government bodies, community organizations, private corporations, environmental NGOs or multi-stakeholder groups) that manage the area and make decisions within mandated directions.
vi.	Community or Private Owner Management	Accountability for management of the conserved area rests with non-government individuals, corporations or representatives of indigenous peoples who are owners of the land, who have formally dedicated the lands to conservation, who manage the area and make decisions.

Whichever approach is adopted, success depends on good, committed and responsible governance. Under good governance, issues such as relationships, levels of power and authority, accountability, responsibility, fairness, and justice will be applied equitably and assertively.

2.7.9 Community Based Natural Resources Management

In many countries in southern Africa, large populations of wild animals live in communal lands. In some countries, the extent of such populations exceeds that of the wildlife in formally protected areas, and therefore is a valuable natural resource. Community based natural resources management in the region has grown out of the realization that government systems could not adequately manage or control populations outside of protected areas. A logical outcome of this was to devolve various levels of resource tenure to communities in a bid to encourage them to attribute economic value to the wildlife and to assume custodianship of those resources.

In many areas participating communities have borne the fruits of this approach, and have received significant levels of benefit from hunting of specified quotas of wild animals, through setting up tourism facilities such as camp sites, or from entering into joint ventures with the private sector in developing lodges.

Mozambique has also recently initiated community conservation and eco-tourism programs, as the Tchuma Tchato (Tete), Xipange Tcheto (Niassa) and Chimanimani (Manica) programmes currently being implemented.

2.7.10 The emergence of Transfrontier Conservation Areas

An emerging trend in conservation globally is to encourage the linking and extension of conservation areas to encompass critical ecosystems or to allow wild animals to have larger areas in which to carry out their natural life cycles. As a response to this, and as a means of creating greater visibility for conservation, the development of Transfrontier Conservation Areas has become an accepted form of protected area management globally. Mozambique has been a leader in southern Africa, in this regard, forging the way for a number of new TFCA initiatives in the sub-continent.

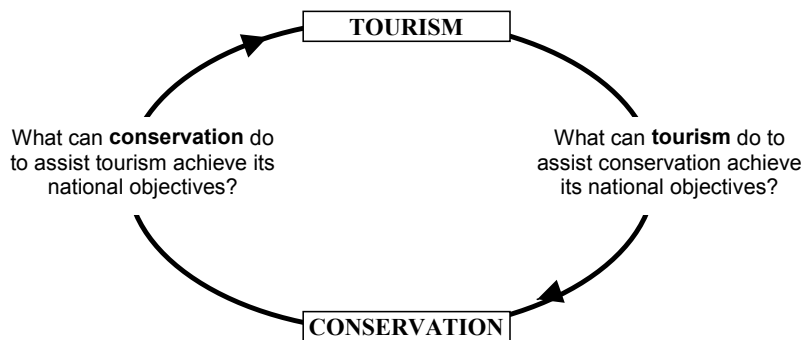
The Greater Limpopo TFCA provides a model in which formal conservation areas and CBNRM can be combined into one concept of integrated conservation management. By effectively including communities in the overall concept, the path is prepared to facilitate the rehabilitation of wildlife into not only the formal conservation areas, but also into communal areas – effectively providing them with new livelihood and economic options besides agriculture. TFCAs thereby become a tool for facilitating development for marginalized communities.

Plans are on the table within the southern African governments to create an extensive network of TFCAs on a significant proportion of the borders of all countries.

2.7.11 The Relationship between Conservation and Tourism

Because conservation is the mechanism government and civil society use to protect natural assets and tourism is one of the most important uses of these natural assets, it is clear that tourism and conservation cannot be separated. This being so, it is necessary to understand how conservation assists tourism achieve its national objectives and how tourism assists conservation achieve its national objectives (Figure 5).

Figure 5 - The symbiotic relationship between conservation and tourism



2.7.12 The Role of Conservation in Tourism

Tourism cannot occur without bringing change to natural areas. In this sense, tourism poses a threat to the integrity of natural areas. But it can also support conservation by encouraging investment and development of infrastructure that enable tourists to access conservation areas. This creates employment opportunities and generates income, some of which can be directed towards managing the impacts of tourism and promoting sound conservation.

The in-country benefits flowing from conservation related tourism are varied and are felt in all sectors of the economy. At the external level, successful conservation tourist destinations build prestige for a country and encourage support for and investment in its development and conservation efforts. Tourists visiting conserved areas draw upon a wide range of in country goods and services, many of which are not related directly to the conserved areas, such as banking, communication, transport and health services. Because conservation areas are commonly in poorer rural areas they can contribute to social and economic welfare in situations where few other options exist. In Mozambique, conserved areas are located in all provinces. In this way, tourists to conserved areas spread the benefits of their visits throughout the economy and thereby contribute to achieving the national objectives of tourism.

Increasingly tourists desire personal experiences of their chosen destinations. This trend encourages the development of niche markets such as diving, deep-sea fishing, hunting, birding, eco-tourism and adventure eco-tourism. All of these are critically dependent upon the presence of an effective conservation process to ensure that the quality of experience is safeguarded. Realizing the high niche market potential associated with conserved areas will contribute significantly to helping tourism achieve its national objectives.

2.7.13 The Role of Tourism in Conservation

There is a global trend towards reducing central government funding for conservation. Increasingly, conserved areas are perceived to be able to generate sufficient income to be self-sustaining. However, it is improbable that all conserved areas can become totally self-reliant.

Tourism, both domestic and international (regional and intercontinental) is seen to be the mechanism whereby conserved areas will generate income. In some countries, conserved areas have been well managed for many years and they are icons in the tourism industry. The path to financial sustainability for these conserved areas is easier than for those that have to be rehabilitated and for which a market has to be developed. This is the case of Mozambique that, in order to regain its position in the tourist market and generate income for its sustainable management in the short to medium term, will have to carry out an appreciation of the potential of conserved areas in order to contribute to a tourism that motivates allocation of resources to conservation. National promotion of tourism, underpinned by a strong conviction of the future important role for conserved areas in tourism, can assist in rehabilitation and thereby help conservation achieve its national goals.

Conservation has always been connected to tourism, but more as a social service than as a business within the tourism domain. Tourism is structured on business principles and as such directs conservation practices towards adoption of business models.

In the context of a developing country with no capacity to enhance conservation to a level of a sanctuary based purely on ecological, biological or scientific demands, the former model promotes the adoption of a more flexible approach to the management of natural resources and conservation areas. However, it does not exclude the need of adopting a rational perspective in the management and use of such resources and areas, based on the need to

protect the country's common heritage, and in specific cases, the common heritage where endangered species need to be protected.

In general, tourists tend to be attracted by different types of protected areas. In this context, and without deviating the focus from the ecological and related conditions, a country can establish different categories of protected areas in order to increase its competitive advantage when it comes to attracting tourists. The world tourism industry answers to specific demands by developing various types of niche markets. Nature based tourism or eco-tourism is one of the fastest growing niche markets globally. Eco-tourism can be classified into two different categories, respectively hard and soft; soft eco-tourism can be described as a more casual approach, less dedicated to the activity or natural attraction, and implies a desire to have the experience with a basic degree of comfort. Hard eco-tourism (including adventure activities) refers to the interest of specialists or to a more dedicated approach, characterized by a desire to face open environments or even the jungle with little or no comfort at all. Table 4 shows how such activities could be compared to the objectives of various types of conservation areas.

However, the guidelines of the IUCN's Commission on National Parks and Protected Areas (CNPPA) attach great importance to the determination of the management approach and uses allowed in each area (See Appendix 1).

Table 4 – Compatibility of forms of tourism with IUCN's protected areas management categories (after Lawson, 2001)

IUCN PA Category	Hard Eco-tourism	Soft Eco-tourism	Other Forms of Tourism
I a Strict Nature Reserve	No	No	No
I b Wilderness Area.	Yes	No	No
II National Park	Yes	Yes	No
III Natural Monument	Yes	Yes	No
IV Game Reserve	Yes	Yes	No
V Protected Landscape or seascape	No	Yes	Yes
VI Managed Resource Protected Area	No	Yes	No

2.7.14 Conservation and Conservation Areas In Mozambique

In Mozambique, the purpose of the Conservation Areas System is two-fold: to conserve ecosystems, wild habitats, biological diversity and natural resources for the benefit of present and future generations, and secondly, to contribute to the development and the social-economic well being of its citizens through domestic and international tourism and availability of wildlife products and other natural resources for local consumption.

Although the current Mozambique legislation (Land Law of 1999 and the Forest and Wildlife Law of 1997) does not allow for human settlements inside conservation areas designated as totally protected (National Parks and National Reserves), the reality is that there is a substantial number of communities living inside these protected areas. This poses a considerable challenge to the management of these areas, giving rise to conflicts (human-wildlife) and resource degradation (destruction of habitats and uncontrolled killings of wildlife).

Mozambique has a good network of protected or conservation areas system whose coverage extends into all the diverse eco-regions and biomes, thereby offering protection to representative portions of the national natural heritage (See table below). The core protected areas network, i.e., the National Parks and National Reserves covers 12.6% of the total land

surface of Mozambique, but this area coverage increases to about 15% when Coutadas are included.

However, most conservation areas in Mozambique are weak in terms of critical masses of wildlife populations due to prolonged internal armed conflicts that the country had gone through during the pre and post independence periods, and to unregulated hunting. As a consequence, areas that were once rich and diverse with wildlife species, such as the Gorongosa, Zinave, Banhine and Limpopo Parks, and Marromeu and Gilé National Reserves, now have only isolated little and/or fragmented populations of wildlife that are endangered, rare or threatened with extinction. Moreover, the civil instability did not only decimate wildlife but it also had profound negative impacts on the infrastructure found in conservation areas and caused people displacement, obliging some to invade and settle inside the parks, national reserves and official hunting areas.

The absence of management during the war period led to the deterioration of all support infrastructures found in the National Parks and Reserves. Administrative posts were abandoned and maintenance was paralysed. Roads, water, energy sources and housing were vandalized or fell into disrepair.

Table 5 (a) - National Parks

National Parks			
Province	Designation	Year of Creation	Area (km²)
CABO DELGADO	Quirimbas National Park	2002	7,500
SOFALA	Gorongosa National Park	1960	3,770 (core area) 1,600 (buffer area)
INHAMBANE	Zinave National Park	1973	6,000
	Bazaruto National Park	1971	1,600
GAZA	Limpopo National Park	2001	10,000
	Banhine National Park	1973	7,000
Total Area			37,470 km²

Table 5 (b) - National Reserves

National Reserves			
Province	Designation	Year of Creation	Area (km²)
NIASSA	Niassa National Reserve	1964	Core area = 15,000 Buffer zone = 17,000
ZAMBEZIA	Gilé National Reserve	1960	2,100
SOFALA	Marromeu Special Reserve	1960	1,500
MANICA	Chimanimani National Reserve	2000	7,500
INHAMBANE	Pomene National Reserve	1964	200
MAPUTO	Maputo Special Reserve	1960	700

The creation of conservation areas in Mozambique started not very far back in the past. Most of the totally protected conservation areas were created during the sixties and early seventies; the early sixties witnessed the establishment of the national reserves (83.3% of the national reserves and 17% of the national parks), whereas the initial period of the seventies was the period of creation of 50% of the national parks existing in the country. The first decade of 2000 was marked by a growth of the parks (creation of the remaining 33.3%) and reserves (17%).

The establishment of conservation areas with protected exploration, e.g. hunting blocks, started in the decade of 60, with special emphasis during the last year of the decade, when 67% of the 12 existing hunting blocks were created. The seven game farms currently existing in the country were introduced during the present decade.

HUNTING BLOCKS (COUTADAS)			
Province	Designation	Year of Creation	Area (km²)
MANICA	N.º 4	1969	4.300
	N.º 9	1969	4.333
	N.º 7	1969	5.408
	N.º 13	1960	5.683
SOFALA	N.º 5	1972	6.868
	N.º 6	1960	4.563
	N.º 8	1969	310
	N.º 10	1961	2.008
	N.º 11	1969	1.928
	N.º 12	1969	2.963
	N.º 14	1969	1.353
	N.º 15	1969	2.300
Total Area			42.017

Considering the circumstances prevailing when the hunting blocks were created (low population density, etc.), it can be noticed that the current limits of many of these areas are not adjusted to the present reality, and there are many latent conflicts of interest between the local populations that have increased (both due to natural factors and to voluntary and involuntary movements imposed by the armed conflict that ended in 1992) and the safari operators. In this context, the revision of the limits as well as of the plan of use of these areas, taking into consideration the different interests involved, is crucial and urgent. This process should include a review of the methods of approaching the relationship between the economic activities of safaris with the local communities, in order to create means for channelling the benefits arising from the safari activities to the local populations.

GAME FARMS			
Province	Designation	Year of Creation	Area (ha)
CABO	Negomano Safaris Lda.	2000	10.000
DELGADO	Messalo Safaris	2000	10.000
	Cabo Delgado Biodiversity & Tourism	-	5.342
SOFALA	Sabie Safaris Tours Lda.	2000	10.000

ZAMBÉZIA	Game Farm Naora Gile	2000	10.000
GAZA	Paul & Ubisse	2000	30.000
MAPUTO	Sabie Game Park SAPAP (Sociedade de Abastecimento e Produção Agro-Pecuária)	2001	40.000
		2000	10.000
Área Total			125.342
TFCAs			
Location	Designation	Conservation Areas in the TFCA	
Mozambique, South Africa and Swaziland	Lebombo TFCA	Maputo Special Elephant Reserve	
Mozambique, South Africa and Zimbabwe	Greater Limpopo TFCA	Greater Limpopo N.P., Banhine N.P., Zinave N.P.	
Mozambique and Zimbabwe	Chimanimani TFCA	Chimanimani National Reserve	

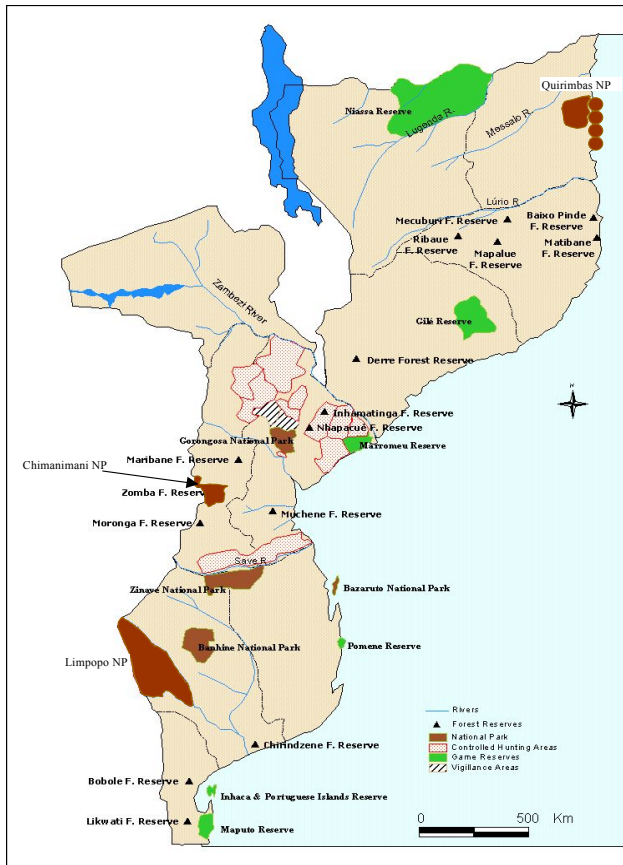


Figure 6 – Conservation Areas in Mozambique

2.7.15 Transfrontier Conservation Areas and CBNRM in Mozambique

Mozambique recognizes that conservation is a valuable and compatible form of land use, that when properly managed will provide sustainable socio-economic goods and services for the well being of communities, contributing to the alleviation of poverty. Endowed with a variety of ecological systems that are rich in species endemism, including large areas of marine and fresh water systems that transcend beyond national boundaries, Mozambique has the potential to develop a coastal and hinterland nature-based tourism industry that will allow it to become the tourism destination of choice in east and southern Africa, by the year 2020.

Some of the existing coastal areas have already become tourist destinations of high demand, and have developed significant infrastructure and facilities to meet these demands. However, the inland areas have little infrastructure and few developed products to offer, seeing that wildlife was decimated during the conflict years.

Recognising this, Mozambique has in recent years pioneered a process to focus attention on developing new conservation areas through the Transfrontier Conservation Areas project. This initiative aims to create collaborative schemes in which contiguous areas in neighbouring countries are designated and formed into a ‘joint management’ regime, effectively enlarging the conservation area in a synergistic manner. TFCAs are part of a strategy that provides a framework for the private sector to invest in developing new tourism facilities and services in these areas as these are created or rehabilitated. The MAB network

(AfriMAB) aims to promote regional co-operation in the fields of biodiversity conservation and sustainable development through transborder projects, which are primarily based in biosphere reserves. Mozambique is not, however, an active partner in this programme. Biosphere Reserves are areas of terrestrial and coastal ecosystems promoting solutions to reconcile the conservation of biodiversity with its sustainable use (See Appendix 1).

Mozambique has entered into agreements with South Africa, Zimbabwe and Swaziland to form the Greater Limpopo TFCA, the Lebombo TFCA and the Chimanimani TFCA, whilst a draft agreement has been developed for a TFCA with Zimbabwe and Zambia, to be called the ZIMOZA TFCA. Planning is progressing for a TFCA with Tanzania, encompassing the Niassa Game Reserve and the Selous Game Reserve, another with the chain of islands called the Quirimbas, and a further coastal/marine TFCA with South Africa around Ponta do Ouro and Kosi Bay (part of the Lebombo TFCA).

The CBNRM has been accepted as a key conservation-based form of land use within the country, promoting the devolution of natural resources management to community level, as well as providing a platform to assign land tenure and to develop institutional management capacity. The Tchuma Tchato program, in Tete Province, was the pioneer project in the country, and serves as a model for future CBNRM initiatives.

2.7.16 Analysis of the Current Conservation Situation

An analysis of the current conservation situation in the country at this point in time highlights a number of issues that need to be considered in developing a strong and robust sector that will support tourism over the long term. These issues are:

- Setting and defining of clear objectives for the use of the various categories of conservation areas.
- Integrating conservation planning with global development.
- Instituting good governance to enhance partnership arrangements, collaboration and networking.
- Developing service delivery mechanisms that are attractive to business ventures.
- Conservation of biodiversity and other non-tourism functions of conservation areas are recognized and factored into conservation area management plans.
- Adoption of the new and emerging conservation paradigms is essential if Mozambique is to rehabilitate its conservation sector over the short term and become recognised as a regional conservation agency of significance.
- Good and enabling conservation related policies and legal frameworks are important to enhance the security of resources, attract investments and provide attractive destinations for tourists and other users of conservation areas.

The national strategic plan for conservation must be elaborated in a way that ensures that conservation is recognised as a legitimate and viable form of land-use, practiced within a two tiered set of objectives: biodiversity conservation and generation of economic products for the tourism industry.

2.7.17 Strengths, Weaknesses, Challenges and Opportunities

An analysis of strengths, weaknesses, opportunities and threats of conservation in Mozambique revolves around the issue of developing good, enabling conservation related policies and legal frameworks to manage natural resources and conservation areas to both enhance biodiversity as well as to address development issues, especially by contributing to the success of tourism processes in the land. However, good policies on their own are meaningless if there is no capacity to implement strategies that are designed to achieve them.

Strengths

- Eastern Miombo Woodland
- Southern Miombo Woodland
- Mopane Woodland
- Southern Zanzibar –Inhambane Coastal Forest
- East African Mangrove
- East African and Madagascar Marine Ecosystem

Presently, Mozambique has a significant network of conservation areas covering all the three biomes and eco-regions, and comprises of the following conservation area categories: National Parks (6); National (Game) Reserves (6); Hunting Concessions – Coutadas (12).

National parks and reserves cover 12% of the total area of Mozambique. By including the hunting concessions, this area increases to nearly 15%.

Weaknesses

- Drastic reduction of wildlife
- A very weak wildlife resource base needing rehabilitation and restoration in order to be competitive in tourist attraction in the Southern African region.
- Insufficient Government budgetary allocations to the conservation sector due to distortions in priority settings, leading to a lack of financial resources for the rehabilitation and management of conservation areas.
- Historical confusion over land tenure, communities' rights and conflicting land use practices.
- Weak institutional setting – conservation is administered by two different ministries.
- Centralisation of resource ownership and weak devolution of access and use rights.
- High levels of poverty, leading to an over-reliance on the use of natural resources for survival.
- Weak coordination among stakeholders involved in conservation processes.
- Inadequate integration of environmental management processes.
- Poor management information systems – inadequate data collection, storage and analysis – inhibiting management effectiveness.
- Inadequate human resources to meet the demands of existing needs or for an expanding conservation program.
- Substantial human settlements inside most national parks and reserves.

Opportunities

Although wildlife has been severely depleted, the existence of few human settlements in many inland areas poses a great opportunity for the increase of existing wildlife population or their re-settlement in other places, as a form of land use. A broad and appropriate

rehabilitation of wildlife in all the areas will allow the country to become a top southern African tourism destination in the next twenty years.

Challenges

The Mozambican government faces the double challenge of rehabilitating and restoring many of its conservation areas whilst doing this under very severe budgetary constraints. The Government has defined principles that will guide its action and influence the direction of its response to these challenges:

- Communities associated with a conservation area have a right to participate in decision making that affects them, their livelihoods and well being;
- To find innovative and pragmatic ways of addressing the issue of people living inside the national parks and reserves without prejudicing them;
- To strengthen and extend a system of CA in general, and the TCFAs in particular;
- To develop approaches and incentives that will strengthen the conservation sector generally, and in particular facilitate the fast-tracking of the rehabilitation of wildlife into all appropriate areas of the country;
- To create mechanisms of participatory management of the CAs;
- To create an appropriate institutional framework that reflects approaches of effective intervention of conservation;
- To promote the development of hunting activities;
- To optimise the use of wildlife through private sector in the development and expansion of the professional hunting industry.

Table 6 - Existing human settlements in some of the Conservation Areas in Mozambique

Existing Human Settlements in some of the Conservation Areas in Mozambique					
Conservation Area	Pop.	Major Activities			
		Major Land Use	Support	Changes	Partners
Gorongosa NP	15 000	Agriculture; Fishing; Small animal production; Hunting.	Park Administration and SPFFB provide technical support and training to community. NGO support for acquisition of certificates of occupation in buffer zones.	Diversification of resource use in buffer: Bee keeping, charcoal production. Cultural hunting in the National Park.	SPFFB. ORAM. District Administration. Management Committee in buffer zone
Maputo Reserve	5 000	Agriculture; fishing; small animal production; hunting.	NGO support for institutional capacity building and acquisition of certificates of occupation in buffer zones.	Diversification of resource use in buffer zone: agriculture, bee keeping	The Maputo Corridor Development Agency assisting in buffer zone management
Niassa Reserve	21 000	Agriculture, fishing and hunting	Private sector technical support and investment in communities.	Social infrastructure	SRN

Quirimbas NP	55 000	Agriculture, fishing, animal production and hunting	Provincial government, NP administration, NGO's and communities determine zones of the NP.	Community participation in NP land use zoning.	WWF
Zinave NP	2 000				IUCN

3 Strategic Model for Tourism Development

3.1 Analysis of Mozambique's Tourism Potential

The analysis of Mozambique's tourism potential takes into consideration factors such as the competitive strengths of the Mozambican tourism product and the constraints for tourism development. Therefore:

3.1.1 Competitive Strengths of the Mozambican Tourism Product

Mozambique's key strengths lie in the quality of its beach product, the exotic ambience and cultural profile of the country and in its wilderness areas with high bio-diversity. Mozambique is one of the few countries that can offer the diversity of beach, eco-tourism and cultural products.

Mozambique is blessed with the strongest coastal assets in southern Africa. Its coastline remains unexplored and has a very diverse landscape, flora and fauna. Marine life is present in large quantities and international diving and fishing experts praise its quality. Large marine species such as dolphins, whales, whale sharks, manta ray, turtles and, at some areas, the very rare dugongs, make up for a diverse and interesting coastal experience.

All Mozambique's neighbouring countries have an Anglo-Saxon past. Mozambique is the only country in the region that offers a cultural environment with a rich heritage of Arabic, Swahili, Portuguese and African influences. This is reflected in its daily life through history, architecture, language, local cuisine, arts and cultural expressions. Mozambique must cherish these differences and use them as an advantage.

Even within Africa, Mozambique remains a relatively unexplored country with true wilderness areas and opportunities to experience the real African life. The local scenery is largely unspoiled and, with the exception of the more densely populated areas, the landscapes remain largely unaffected by human interference. No industry exists outside a few industrial zones surrounding the main cities and larger scale commercial agriculture is very limited. Mozambique is blessed with a scenic landscape and travelling between tourism destinations is an experience in itself. The rural areas of the country offer a wide variety of landscape and eco-systems and provide a rich and varied platform for the development of a thriving nature and wildlife based tourism sector.

3.1.2 Constraints to Development of Tourism

There is general consensus in the country that tourism holds tremendous potential for Mozambique. However, this tourism potential must be translated into meaningful products and services of acceptable quality if tourism is to grow.

Sentiments relating to the poor status of development of the sector point to:

- Lack of financial, human and material resources in the public sector, that leads to a weak implementation capacity of the policies and programmes approved by the government. As a consequence, even where policies, guidelines and action programmes have been formulated, the lack of resources limits considerably the institutional intervention capacity.
- The need to create and develop an improved intervention capacity of the public sector, through the appointment of qualified and appropriate staff to answer to the demand, particularly at local level, focusing on districts with higher tourism potential. This not only applies to the tourism sector, but also to other public institutions that interact with tourism as a whole.

- Weak level of integrated planning and implementation.
- Lack of reliable statistical data and satellite accounts to form a base for planning and to measure the actual economic impacts of tourism on the national economy.
- Lack of skilled labour, what indicates that the emphasis should be placed on training and education at the basic and medium level. Considering these as immediate priorities across the sector, the education and training efforts must not only be directed at the future professionals of the tourism sector, but also include other important role players such as immigration, police, transport providers, communities, etc;
- The private sector remains concerned about the excessive bureaucracy and weak planning capacity of the sector. The concerns have to do with investment procedures, the availability, allocation and difficult access to land, and lack of availability of infrastructure and utilities. Other concerns relate to lack of availability of skilled people and access to credit.
- Weak participation by the local population, particularly in terms of: ownership, employment, investment opportunities, SMME development and professional skills enhancement.
- Foreign Direct Investment (FDI) is critical for future growth of the sector. A balanced growth of both FDI and national private sector investment is a requirement.
- The image and positioning of Mozambique as a tourism destination remains unclear. The marketing resources are exiguous and clearly insufficient. On the other hand, the absence of a dedicated marketing body and the poor or almost inexistent marketing strategies are key factors that are determinant in the creation of new major investments and in the impact in tourism development and growth in Mozambique.
- The weak level of private/public sector partnership and communities is identified as a major issue and viewed as a strategy that should be integrated in future sector programmes.
- The use of conservation areas in tourism remains untapped. Contributing factors include: reduced numbers of wildlife, unresolved issues relating to communities, availability of human resources adequately trained to fulfil effectively their fiscalization tasks, as well as a weak logistical and operational support. Consequently, the lack of private sector investment, the inefficient institutional framework and the lack of an institutional capacity dedicated to and capable of promoting and bringing together the public and private sector and communities, are elements that should be urgently addressed and resolved if tourism is to realize the opportunities.

Table 7 summarizes the main issues raised during the provincial and regional seminars about the National Tourism Policy and Strategy. Whilst the issues outlined above are not all comprehensive, they represent key themes, elements and factors that can be established as starting points for more comprehensive studies that can result in clearer guidelines and objectives according to the reality and interests of the country. The themes provided direction to the National Tourism Policy and informed the formulation of the Strategic Plan for Tourism Development.

Table 7 – Key constraints to tourism development

Infrastructure
Institutional development
<ul style="list-style-type: none"> ■ Lack of planning, zoning and master plans for strategic tourism areas; ■ Lack of communication, coordination and linkages between sectors and administrative entities; ■ Complicated procedures for investment applications and land allocation procedures; ■ Weak investment promotion; ■ Weak institutional intervention capacity; ■ Poor availability of material and financial resources in the tourism sector; ■ Weak capacity to control and monitor both in Conservation Areas (anti-poaching) and in coastal zones (unplanned and illegal construction); ■ Perceived complicated processes in the management of the international movement of people, what results in long waiting times and creates a negative image of the migration authorities (visas, borders); ■ Security.
Human resources
<ul style="list-style-type: none"> ■ Low quality and quantity of trained people in conservation and hotel and tourism sector activities; ■ Limited training and education institutes and their geographical spread; ■ Weak awareness about the importance of tourism among local population, especially in rural communities; ■ Lack of community involvement in the development processes of tourism projects; ■ Lack of internal communication about the significance of the tourism and associated benefits for the economy and local communities.
Marketing and products
Environment
<ul style="list-style-type: none"> ■ Health; diseases and hygienic situation (malaria, cholera, HIV/AIDS) and quality and quantity of hospitals and clinics; ■ Erosion; ■ Non-sustainable use of natural resources (mining, poaching, deforestation); ■ Weak intervention in terms of conservation and preservation of tourism zones; ■ Lack of guidelines and regulations in the construction of tourism establishments; ■ Occurrence of inadequate behaviour of tourists in terms of rules and norms compliance and use of natural resources; ■ Lack of information and training among local community members for the preservation and maintenance of national values and resources.
Conservation and Tourism
<ul style="list-style-type: none"> ■ Low head count of wildlife on most Conservation Areas; ■ Poaching and uncontrolled killing of wildlife by poachers and local communities; ■ Communities living in Conservation Areas and the impact of their subsistence activities on wildlife and conservation ('burn and slash' practices, hunting, impacts of agriculture); ■ Lack of trained rangers in Conservation Areas; ■ Poorly equipped personnel (lack of uniforms, boots, transport, radio, firearms) and low level of infrastructure provision (roads, accommodation, health services, etc.); ■ Lack of private sector investment in CA and lack of support infrastructure to attract private sector; ■ Lack of management plans and zoning of areas for tourism development.

Source: Tourism Stakeholder workshops 2002 and 2003, KPMG/MITUR/World Bank

3.1.3 SWOT Analysis of Tourism in Mozambique

A SWOT analysis of strengths, weaknesses, opportunities and threats for tourism in Mozambique (Table 8), shows that currently its beaches are a key factor in the existing tourism mix, although its relatively unspoilt 'interior' provides excellent potential for growth of the wildlife/wilderness sector of the market.

The overall lack of basic infrastructure is a major weakness inhibiting investment and the development of better tourism products, whilst unplanned and uncontrolled development along the coastline is one of the biggest threats to the tourism industry.

Table 8 – Strengths, Weaknesses, Opportunities and Threats to Tourism in Mozambique

STRENGTHS	WEAKNESSES
Tropical and quality beaches and year-round warm waters.	<ul style="list-style-type: none"> ■ Image (affected by the past of Mozambique and the image of the African continent, like political instability, mines, crime, natural disasters, poverty, HIV/AIDS, malaria and other illnesses).
<ul style="list-style-type: none"> ■ Exotic tropical islands, many part of a marine national park. Islands are sought for by many upmarket tourists and southern Africa has very few. 	<ul style="list-style-type: none"> ■ Overall level of facilities and services (water, public health, sanitation, sewage).
<ul style="list-style-type: none"> ■ Long stretches of high quality coral reefs and marine life including large species, such as whales, dolphins, turtles, dugongs, etc. 	<ul style="list-style-type: none"> ■ Lack of planning in land-use and other resources, weak inter-institutional relationship in history of tourism development in Mozambique.
<ul style="list-style-type: none"> ■ Quality of game fish. 	<ul style="list-style-type: none"> ■ Weak institutional capacity of the Government to design, control and monitor planning of tourism.
<ul style="list-style-type: none"> ■ Unique coastal wetland, lagoon eco-systems and flora and fauna. 	<ul style="list-style-type: none"> ■ Institutional responsibility for investment promotion not clear and weak performance in investment promotion.
<ul style="list-style-type: none"> ■ Scenic beauty of many tourism routes (eg southern coast, 'Inselbergs' in the north). 	<ul style="list-style-type: none"> ■ Low skill levels across the sector in public and private sector to identify appropriate areas of development.
<ul style="list-style-type: none"> ■ Tropical/exotic environment (different from other Anglo-Saxon countries in the region), reflected in language, music, art, architecture, food, etc. 	<ul style="list-style-type: none"> ■ High perceived levels of bureaucracy and difficult process to attract investment.
<ul style="list-style-type: none"> ■ Local seafood and cuisine (prawns, lobster, crayfish) 	<ul style="list-style-type: none"> ■ Price/quality ratio not balanced (the prices are too high).
<ul style="list-style-type: none"> ■ Historical cities (Inhambane, Ilha de Moçambique) 	<ul style="list-style-type: none"> ■ Little experience among local communities and local entrepreneurs in tourism.
<ul style="list-style-type: none"> ■ Experimental and unique architecture in larger cities (mainly Beira, Maputo) 	<ul style="list-style-type: none"> ■ Low diversity in product offering using the potential of the cities.
<ul style="list-style-type: none"> ■ Marine National Parks (Bazaruto, Quirimbas). 	<ul style="list-style-type: none"> ■ Service and quality of accommodation in general low.
<ul style="list-style-type: none"> ■ Proximity to Kruger Park in South Africa. 	<ul style="list-style-type: none"> ■ Access roads and preventive care for malaria, cholera outbreaks and other diseases.
<ul style="list-style-type: none"> ■ Relatively 'untouched' wilderness areas in the most isolated zones. 	<ul style="list-style-type: none"> ■ Huge distances and limited transport services in the country.
<ul style="list-style-type: none"> ■ World records: highest sand dunes, largest populations of dugongs, longest Indian Ocean coastline, armed independence struggle. 	<ul style="list-style-type: none"> ■ Difficulties to overcome to key constraints for tourism development (poor access/infrastructure, human resources, institutional aspects, marketing, conservation, environment, etc.)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ■ Develop 'bush/beach' linkages with Kruger Park and the Limpopo TFCA and the Inhambane/Gaza beaches 	<ul style="list-style-type: none"> ■ Environmental impacts and loss of marine resources through uncontrolled growth of tourism and local fishing techniques.
<ul style="list-style-type: none"> ■ Indian Ocean Safaris (a more active definition for sea, sun and beach tourism, to experience the marine life and large species). 	<ul style="list-style-type: none"> ■ Uncontrolled growth and development of the tourism sector.

<ul style="list-style-type: none"> ■ Develop tourism routes and circuits connecting the major tourism attractions in the country and region. 	<ul style="list-style-type: none"> ■ Dominance of operators and tourists from South Africa and other countries in the region or from countries with additional interests in Mozambique.
<ul style="list-style-type: none"> ■ Tap into emerging eco-tourism market. 	<ul style="list-style-type: none"> ■ Communities do not effectively participate in tourism programs.
<ul style="list-style-type: none"> ■ Niche-marketing. High potential niches for Mozambique: birding, hunting, diving, fishing, cultural tourism, eco-tourism and adventure. 	<ul style="list-style-type: none"> ■ Limited Government capacity to engage larger scale investors and to allocate resources for the performance of marketing activities.
<ul style="list-style-type: none"> ■ Marketing of Mozambique's regions (the Southern, Central and Northern regions have different profiles and opportunities). 	<ul style="list-style-type: none"> ■ Unbalanced growth of regional/domestic/international markets and investors.
<ul style="list-style-type: none"> ■ Regional integration (Southern Africa) through creation of bush-beach linkages, TFCAs, corridors and regional tourism circuits. 	<ul style="list-style-type: none"> ■ Instability and political unrest in various countries in Southern Africa continue to impact on the region, in general, and on the Mozambican market in particular.
<ul style="list-style-type: none"> ■ Tap into the growing domestic market of South Africa and the region at large. 	<ul style="list-style-type: none"> ■ Continued limited availability of skilled human resources for designing and implementing programs.
<ul style="list-style-type: none"> ■ Recent decentralization of government provides opportunities for delivery of tourism programs at the provincial and district level. 	<ul style="list-style-type: none"> ■ Weak availability of technical and financial resources for the implementation of strategic integrated plans for tourism development.

Considering the tourism potential determined by its natural resources, Mozambique should plan its future development adequately focusing on strategies based, on the one side, on the need to answer to the demands of the internal, regional and international markets, which are strategic for the country, and on the correct definition of development zones to enhance the tourism product quality, on the other side.

3.2 Strategic Markets for Mozambique

3.2.1 Analysis of Strategic Markets for Mozambique

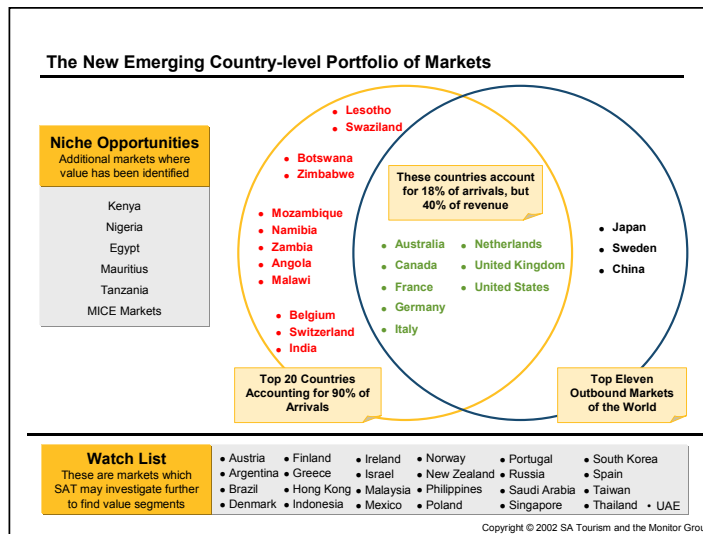
Understanding source markets and identifying cohesive segments and trends within these is a precondition for effective product development and marketing. This chapter discusses essential elements for the development of important markets for Mozambique. The issues include:

3.2.2 South African source markets

Linking into tourism in South Africa is a major opportunity for Mozambique, whose geographical situation is crucial, and it is likely that tourism patterns in South Africa will partly determine the future structure of the sector in Mozambique.

South African tourism has redefined its growth strategy in 2002. The top eight key markets for South Africa in terms of arrivals and revenue have been identified as UK, Germany, US, France, Italy, Netherlands, Canada and Australia, which remain the focus for marketing efforts to SA tourism. Japan, Sweden and China also present high long haul opportunities.

Figure 7 – Strategic Source Market to South Africa



Analysis of source markets exposes interesting marketing opportunities to mainly African markets, which accounted for 65% of total arrivals in 2000. Intra-regional travel is expected to further expand from 57% in 1995 to 65% of international visitor arrivals to Africa as a whole in the year 2020. Although visitor arrivals to South Africa reflect significant arrivals from the African markets, demand-generating countries of the continent are not being aggressively targeted.

Africa continues to be treated as a homogenous, low yield, mass market of cross-border shoppers. This is patently incorrect. Detailed figures about actual revenues are difficult to collect, as African tourists tend to spend less money on ‘measurable’ tourism parameters such as accommodation and park fees and much more on retail and entertainment.

However, despite the limited information available, it can be noticed that the main market segments in the African market are ‘retail tourism’ and ‘business tourism’. According to SA Tourism’s International Visitor Survey January 2000, nearly half (46%) of all visitors to South Africa from African countries, came for business purposes. 78% of all African visitors went to Gauteng.

Retail tourism pertains to visitors from other countries who enter South Africa for the main purpose of purchasing goods and services to take home with them. The majority of cross-border shoppers originate from SADC countries, with increasing arrivals from further North such as Nigeria and Ghana. Gauteng, and particularly Johannesburg, are well positioned to capitalize on the African retail tourist.

Retail tourists face constraints relative to transport, border-post crossings, safety, suitable and accessible accommodation, etc. These constraints must be addressed if marketing effort is to impact in sustaining and increasing demand.

Interesting in this regard is that the amount of Mozambican arrivals to South Africa (about 500,000 in 2000) surpasses the total amount of arrivals to Mozambique (300,000 in 2001).

It should also be noted that the Angolan market offers other interesting opportunities to Mozambique. The similarity in terms of language and culture and the existence of a high yield segment is a sound basis for its exploration. In a foreseeable future, Mozambique can also benefit from the existing African flows to South Africa through “Fun and Sun”

packages, linking the entertainment and retail products of Gauteng with the sun, sand and sea tourism of the southern coastal area of Mozambique.

3.2.3 Source Markets to Mozambique

Traditionally tourism flows to Mozambique have stemmed from South Africa and Portugal. In 1997, visitor arrivals recorded totalled 300,000, and by 2001, arrivals reached 404,095.

Whilst this is positive, these visitor arrivals remain relatively low compared to other destinations with similar strength in product at a regional, continental and global level.

Arrivals from Africa dominate (350 percent growth reached over 1999). South Africa is the major source market, contributing approximately 67 percent of total arrivals in 2001. Other near markets such as Swaziland also generate demand, albeit at a low base. Portugal is the major international source market, contributing approximately 7.5 percent of total arrivals in 2001.

Thus, new source markets to Mozambique will have to be considered by the tourism authorities in Mozambique, where opportunities in Africa with similar potential as the above mentioned example of Angola would have to be evaluated and directed in view of retail tourism enhancement.

3.2.4 Emerging Source Markets for Mozambique

Competing in saturated markets like Germany, UK and the US, where Mozambique competes with other emerging destinations across the world with similar product potential like Honduras, Ethiopia, Madagascar, Vietnam etc, will be difficult and expensive at the beginning.

Highest effectiveness of marketing spending can be expected in markets with some 'synergy' with Mozambique. In this regard, a closer look at emerging source markets like the Middle East, South America and the Far East, will be necessary. Tourists from the Middle East are increasingly confronted with complications with visas, etc., to enter developed tourism destinations in the Americas and Europe, and are looking for alternatives.

The relative proximity of Mozambique and the strong Muslim tradition in the country provide entry points. South America, and in particular Brazil, also provide exciting opportunities. The cultural and language similarities between the two countries and the percentage of the population with African roots (about 45%) combined with the growing percentage of the population that can afford travel provide a good base for further exploration.

3.2.5 Drivers of Demand

The key drivers of demand considering the current situation of Mozambique may be identified in the following markets:

3.2.5.1 Domestic Market

A culture of domestic tourism is important to any destination. Although limited in size, the domestic market is growing. The primary source of domestic demand is Maputo. Of growing importance are provincial urban centres, such as Beira, Chimoio and Nampula. These cities are situated in close proximity to tourism attractions and generate considerable travel. Future domestic tourism demand will stem from the following main sectors:

Business – including the private sector, government and aid sector (NGOs, embassies, cooperation partners, etc.);

Leisure – including families, small groups, couples, expatriates travelling for the purposes of taking holidays, weekend breaks, day excursions, events, sports, shopping, entertainment, etc.

Visiting friends and relatives (VFR) – many Mozambicans living in the larger cities have still strong ties with relatives in rural areas and visit rural areas during holidays.

MICE – the meetings, incentives, conferences and exhibitions market. Purposes of travel include business, team building, social gatherings, religion, etc.

3.2.5.2 *Regional Market*

Globally, domestic and regional tourism remains many times more important than international tourism in both activity and money terms. South Africa is a key regional source market for Mozambique. It has relatively affluent population in regional terms, with a high propensity to consume travel, leisure and entertainment.

Families, adventure tourists and fishermen are the traditional segments traditionally attracted to Mozambique, particularly its southern beaches. Patterns already point toward a more diversified market from South Africa. The regional youth market is gaining spending capacity and is starting to travel more for leisure purposes rather than just visiting friends and relatives. The social atmosphere of the places to visit and being away-from-home, and the beach culture could attract greater numbers from this market.

The pristine, secluded and romantic nature of the three major regions of Mozambique could attract high yield professionals, couples and honeymooners. Strategic focus will be placed upon extracting further value from the regional market by up selling and cross-selling into other product areas and penetrating new higher yield lifestyle segments.

Regional tourism demand will stem from the following principle sectors:

Business – including commercial travellers, feasibility travellers, trade missions, business visitors and to Government, NGOs, development agencies, embassies, etc.;

Leisure – including families, small groups, couples, expatriates residing in the region. Travel purposes include taking summer/school holidays, weekend breaks, day excursions, events, sports, shopping, entertainment, visit to friends and relatives (VFR), etc.;

MICE – relates to the meetings, incentives, conferences and exhibitions market. The purposes of travel include business, team building, social meetings, religion, product launches, etc.; and

Special interest – including deep sea fishing, scuba diving, adventure, eco-tourism, overlanders and backpackers, bird-watching, cultural enthusiasts, hunting, etc.

3.2.5.3 *International Market*

At present, international visitors primarily visit Mozambique on business or to see friends and relatives. Visitors not drawn to Mozambique specifically for these purposes are largely those on a “southern Africa trip”.

Hunting has historically contributed to international tourism demand and will play a role in future international tourism growth. Overlanders and backpackers are increasingly including Mozambique in their southern Africa adventures, with Maputo and Inhambane already serving as “mainstream destinations”, while a number use Mozambique as a through-destination (via the centre region) onwards to Malawi.

International tourism demand will stem from the following main sectors:

Visiting friends and relatives – this will primarily stem from the Portuguese market, as well as friends and relatives visiting staff working for donor agencies, embassies and international corporations;

Leisure – including free independent travellers, independent travel groups, organized tour groups, high yield international travellers;

Business – including commercial travellers, feasibility travellers, trade missions, business visitors to Government, NGOs, donor agencies, embassies, etc.; and

Special interest – including diving, fishing, eco-tourism, bird-watching, hunting, adventure tourists, backpacking, cultural enthusiasts, cruising.

3.2.5.4 Niche Markets

The analysis of international and regional trends in tourism point to a trend towards more customized, specialized tourism products and a move away from generic 'mass' products. Key travel motivational factors for niche markets include visiting a specific attraction (eg. a specific eco-system) or to participate in a specific activity (eg. diving or fishing), while the travel motivations of general tourist markets are broader and include, for example, relaxation and meeting new people/socializing.

Mozambique's tourism product is still relatively unknown and major marketing efforts will be necessary to increase awareness. International tourism marketing, especially geared towards general tourist markets, is extremely expensive. A niche-approach, in line with the trends towards increased segmentation is, from a marketing perspective, much more cost-effective than a 'main-stream' marketing approach. Niche markets are often easier to target through specialized magazines, web sites, travel agents, clubs and organizations and the power of word-of-mouth.

In addition, dedicated niche tourists are often less demanding in terms of service levels and infrastructure and can, therefore, represent a factor that can be used for the development of a region, with less services and infrastructures. Thus, this can actually constitute an asset for certain niche markets, e.g. for hunting, eco-tourism and adventure tourism, where people are looking for an 'off-the-beaten-track' experience.

Therefore, niche markets can also be a short-term goal for the development and marketing of different products that the country can offer.

4 Tourism Vision

4.1 Tourism Vision for the Future

Taking into account the current low base of existing tourism development and infrastructure and the goals and objectives set out in the SPDTM, the tourism vision, guiding the strategic planning process, must reflect the ambitious nature of goal setting and can realistically only be set for the long term. Therefore, the year 2020 has been chosen as the reference-line for the Tourism Vision for Mozambique.

Box 5 - Mozambique's Tourism Vision for 2020

'By 2020, Mozambique is Africa's most vibrant, dynamic and exotic tourism destination, famous for its outstanding beaches and coastal attractions, exciting eco-tourism products and intriguing culture, welcoming over 4 million tourists a year.

Conservation areas are an integral part of tourism and the combined benefits constitute a significant contribution to National GDP, bringing wealth and prosperity to communities across the Country.'

In order to fulfil this vision, the mission for the national tourism administration is based on the general principles of the tourism policy.

Box 6 – Mission for Tourism Development in Mozambique

The mission for the national tourism administration is to turn the tourism vision in a reality by:

- Establishment of an enabling institutional framework with adequate planning and control mechanisms and effective programme implementation at national, provincial and district levels;
- Effective marketing and image building of the country through national marketing and partnerships with private sector;
- Successful product development and the creation of a conducive investment environment both for national and international investors;
- Rehabilitation and reorganisation of the country's conservation areas;
- Implementing sound and sustainable policies for tourism development and tourism planning;
- Effective engagement of communities in the development of the tourism sector;
- Building of successful partnerships with neighbouring countries and advocating regional integration among SADC countries in marketing, product packaging, cross border initiatives (e.g. corridors, TFCAs), and in alignment of policies and legislation relating to migration, transport and tourism;
- Building of a human resource base across skill levels in private and public sector and among communities through education and training;
- Awareness creation among all Mozambicans about the importance of tourism and the value of the natural and cultural heritage.

Adapted from 'General Principles of the Tourism Policy', Tourism Policy and Strategy, P. 5

4.2 Using the Resource Strengths

The tourism potential of Mozambique is determined by its resource strengths, related to the inherent strengths of the land, wildlife, natural resources, human resources, man-made, the natural and coastal assets, the natural and cultural heritage and the tourism attraction value they represent. Mozambique's key resource strengths are:

- 1) the quality of its beaches and coastal resources ('Blue' product line');
- 2) the diversity and quality of its natural and wildlife resources and the opportunities these provide for tourism products development ('Green' product line);
- 3) the cultural identity of Mozambique, determined by its heritage, people and history, that significantly differs from other countries in southern Africa ('Orange' product line).

These resources must be cherished and continuously developed and protected to guarantee the attraction value of 'Destination Mozambique'. Specific strategies for the correct use of each 'resource strength' are:

Table 9 – Strategies for the Use of Mozambique's Key Tourism Resources

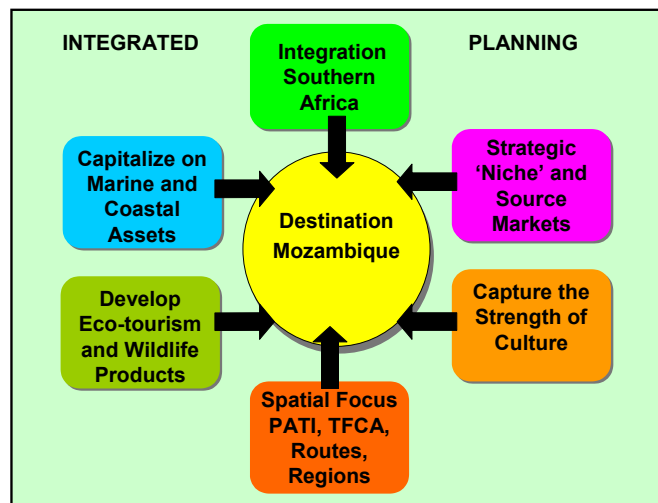
Resource	Strategy	Explanation
Coastal and Marine Resources	Capitalize	Mozambique's vast coastline, tropical beaches and warm waters and rich coastal and marine resources are of exceptional quality and unique in southern Africa. Mozambique should capitalize on this position in product development and marketing, while at the same time conservation and protection of the fragile coastal and marine resources should be a priority.
Wildlife and Nature Resources	Develop	To be able to compete in Southern Africa markets, Mozambique must develop its nature and wildlife based tourism product. Efforts should be focused on (re)building the resources and infrastructure, promoting investments in conservation areas, developing human resources and restocking wildlife.
Cultural and man-made Resources	Capture	Mozambique's cultural identity, determined by its heritage, people and history, differs significantly from other countries in southern Africa and is one of the country's key tourism assets. Mozambique must cherish these differences and use them to 'flavour' its 'blue' and 'green' product lines, as well as to develop a specialized 'orange' or cultural product offering.

4.3 Key Factors of Success

The key tourism resource strengths represent Mozambique's tourism potential. Sound strategies must now be developed to translate this 'potential' into the delivery of tourism and the related economic and social benefits for the country.

The successful implementation of the three strategies for the use of Mozambique's resource strengths is critical to make this happening. Three additional factors emerge that will provide the critical edge to push Mozambique towards its future status of an international tourism destination. These are (1) regional integration (Southern Africa), (2) marketing and product development geared towards selected source and niche markets, and (3) the application of spatial focus in integrated planning, marketing and product development.

Figure 8- Critical success factors for maximizing Mozambique's tourism potential



Critical success factors for maximizing Mozambique's tourism potential are:

- **Capitalize on coastal and marine assets** – Mozambique's extensive coastline, warm tropical waters and rich coastal and marine resources are of exceptional quality and unique in southern Africa. Mozambique should capitalize on this position in product development and marketing while at the same time conservation and protection of the fragile coastal and marine resources should be a priority.
- **Develop nature and wildlife based tourism products** – Mozambique is not a significant player yet in eco-tourism in southern Africa. To be able to compete in international markets, Mozambique must have a competitive wildlife and nature based tourism product. Efforts should be focused on (re)building the infrastructure, investment promotion in conservation areas, human resources development and restocking of wildlife.
- **Capture Identity of Culture** – Mozambique's cultural identity, determined by its heritage, people and history, differs significantly from other countries in southern Africa and is one of the country's key tourism assets. Mozambique must cherish these differences and use them to 'flavour' its 'blue' and 'green' product lines, as well as to develop a specialized 'orange' or cultural product offering.
- **Integration with neighbouring countries (southern Africa)** – No country in Africa will be able to compete in the changing international market place on its own. Regional integration and the development of a southern African destination will be an essential survival technique for all countries in southern Africa. Mozambique will take a lead in regional integration through i) developing and promoting bush-beach linkages with neighbouring countries, ii) initiating and actively developing TFCA initiatives with neighbouring countries, and iii) active participation in regional marketing and development initiatives.
- **Strategic Markets: Niche Markets** – With the current offer of products and limited resources available for marketing and product development, Mozambique must concentrate its resources on a few selected markets. Based upon analysis of tourism trends and resource strengths of Mozambique, the following strategic niches have emerged: diving, deep sea fishing, hunting, birding, eco-tourism, adventure, beach tourism, high-yield 'island' tourism and cultural tourism.

- **Strategic Markets: Source Markets** – With a low awareness of foreign markets and limited resources available for marketing and product development, Mozambique has to concentrate its scarce resources on a few selected source markets. Strategic source markets have been selected using three criteria, (i) strategic source markets to South Africa, (ii) high potential niche markets and (iii) strong cultural synergy.
- **Spatial Focus: Mozambique Regions** – The country is too vast and diverse to be considered and managed as a single destination. The three regions of Mozambique, the South, Centre and North, each has its own identity, strengths, development priorities and regional partners. The tourism profile of the southern region emphasizes regional and domestic tourism, coastal tourism and water sports; the central region is best positioned to concentrate on the development of eco-tourism and adventure based tourism, mainly for specialized international niche markets, while the northern region will develop into an exclusive international beach and eco-tourism destination with a strong cultural component.
- **Spatial Focus: PATIs, TFCAs and Routes and Circuits** – Tourism is spatial in nature and selected geographic areas should be prioritised for development. TFCAs (Transfrontier Conservation Areas), PATIs (Priority Areas for Tourism Development) and Tourism Routes are the identified localities where resources for tourism development will be concentrated.

4.4 Strategic Markets for Mozambique

Mozambique will actively pursue a mix of target market segments (high/medium/low yield; business/leisure, domestic/regional/international) and, in doing so, it will implement a niche approach towards international markets focused around the high potential niches of diving, deep-sea fishing, hunting, bird-watching, eco-tourism, adventure tourism, beach tourism and high-yield “island” market, and cultural tourism. More mainstream marketing approaches will be used for regional and domestic markets where the main market segments continue to concentrate around sun, sand and sea and family tourism.

Therefore, the market development approach will be two folded, addressing selected source markets and specifically targeting niche products.

4.5 Strategic Niche Markets for Mozambique

Key identified niche markets for Mozambique are:

- **Diving** – Diving is one of the fastest growing adventure sports and increasingly popular among young people. Experts consider Mozambique as one of the world’s top class diving destinations. Among backpackers and regional tourists, Mozambique, and especially Inhambane province, is already famous for the diversity of species, including rare large marine species such as whales, whale sharks, sea-turtles, dolphins and manta rays, and the quality of coral reefs.
- **Deep-sea fishing** – Since colonial times, Mozambique has been famous for its big game fish. Tuna, marlin and sailfish are among the species regularly caught and this is combined with the tropical climate, warm waters and boating facilities now existing along the southern coast. Deep-sea fishing is a key activity especially for the regional market and the high-yield ‘luxury’ resort and island markets.
- **Hunting** – Hunting is a small but very lucrative business. Trophy quality in Mozambique (especially in the North of Mozambique) is very good and a good variety

of species with hunting quotas exists. Hunting, being highly specialized, requires some marketing effort and can be a catalyst in opening up new areas for photographic safaris.

- **Birding** – ‘Avitourism’ or bird watching is the fastest growing pastime or hobby in the world, and is one of the fastest growing segments of the eco-tourism niche-market globally. The variety and density of bird species in Mozambique is exceptional and certain areas, such as Gorongosa Mountain, Panda in Inhambane, the coastal lagoons in Bazaruto and Matutuine district are famous among ornithologists. Significant potential exists to develop Mozambique into a leading bird watching destination.
- **Eco-tourism** – The adventure tourism segment consists of around 5 million tourists a year, or approximately 1% of all international tourist arrivals worldwide, and is one of the fast growing segments (*Travel and Tourism Analyst N° 4, 2001*). Adventure travel can be defined as leisure activity involving high levels of activity, mostly outdoors, involving some form of risk and excitement and personal challenge. Mozambique has significant potential for the development of “hard” and “soft” adventure activities, such as rock climbing and abseiling (Northern ‘inselbergs’), 4x4 adventure tracks, hiking and river-sports such as a canoeing and rafting.
- **Adventure Tourism** – The adventure segment consists of around 5 million travellers a year, or approximately 1% of all international tourist arrivals worldwide and is a growth segment (*Travel and Tourism Analyst No 4, 2001*). Adventure travel can be defined as leisure activity involving high levels of activity, mostly outdoors, including some form of risk and excitement and personal challenge. Mozambique has significant potential for the development of hard and soft adventure activities, such as rock climbing and abseiling (Northern ‘inselbergs’), 4x4 adventure tracks, hiking and river-sports such as a canoeing and rafting.
- **Cruising** – Cruising is an emerging market worldwide. Operators increasingly look at the Indian Ocean to expand their cruise product range. With 2700 km of coastline and plenty of interesting historical towns and activity options along the coast there is plenty of opportunity for Mozambique to become an important player in this growing niche.
- **High-yield International Luxury Market** – This market sector is highly educated, benefits from significant disposable income and is attracted by the resort operator and/or the destination. Word of mouth marketing and lifestyle images are hugely important to this market. Increasingly, brand name is becoming an important component of purchase choice. Resorts are small and exclusive and affluent couples meet, socialise and relax together in an environment of total luxury. Islands resorts are particularly appealing to this market.
- **Cultural Tourism** – The rich cultural heritage of Mozambique provides plenty of opportunities for cultural tourism. “Icons” such as Ilha de Moçambique, and to a lesser extent the city of Inhambane, are of exceptional historical and cultural value and will appeal to international specialist markets. Other high potential cultural niches are “architecture”, of exceptional variety and quality, especially in Maputo and Beira, and new cultural niches can be developed around the rich music and dance scene in Mozambique.

4.6 Strategic Source Markets for Mozambique

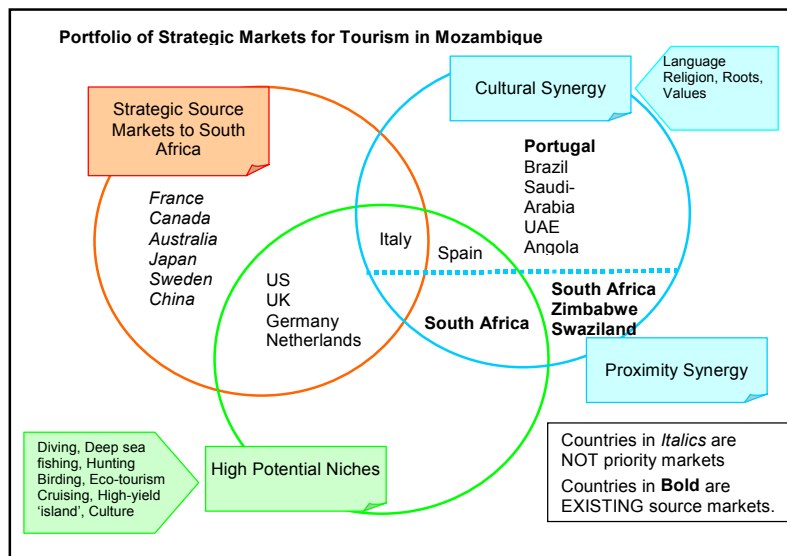
With a low awareness of foreign markets and limited resources available for marketing and product development, marketing efforts will be concentrated on a few selected source markets only. Portugal, because of language and history, and South Africa, mainly because of proximity, are the two major ‘natural’ markets for Mozambique. In selecting other high potential source markets, smart marketing intelligence must be applied.

Strategic source markets have been selected using three criteria: (i) strategic source markets to South Africa, (ii) high potential nice markets and (iii) cultural synergy. Three categories of strategic source markets have emerged: (1) natural markets (based upon proximity and

strong cultural synergy), (2) niche markets (selected strategic source markets to RSA that have strong niche market potential) and (3) emerging synergy markets (developing source markets that have a strong cultural synergy with Mozambique).

In the picture below a clustering of the strategic source markets to Mozambique is presented. Portugal and South Africa are existing markets for Mozambique. Within the strategic source markets to SA, those countries identified as strategic are the US, UK, Germany and the Netherlands and Italy, based upon their high potential for niche market development (US, UK, Germany and the Netherlands) and cultural synergy (Italy). Within the ‘Synergy’ country cluster, Portugal and South Africa have been identified as the primary focus because of their historical performance as source markets and the other countries indicated (Italy, Spain, Brazil, Saudi Arabia, United Arab Emirates, Angola, Zimbabwe and Swaziland) as secondary focus markets.

Figure 9 – Portfolio of strategic source markets for Mozambique



4.7 Linking Products and Markets

Combining the strategic niche markets, strategic source markets and the drivers of demand for domestic, regional and international markets, the following strategic markets emerge for Mozambique.

Box 7 – Strategic market segments for Mozambique

Strategic Market	Selection criteria	Source markets
Natural Markets	Proximity and strong cultural synergy	Domestic market, South Africa, Portugal, Zimbabwe, Swaziland
Strategic Niche Markets	Strategic source markets to RSA that have strong niche market potential	Spain, Italy, UK, US, Germany, Netherlands
Emerging synergy markets	Developing source markets that have a strong cultural synergy	Brazil, Saudi Arabia, UAE and Angola

The primary ‘natural markets’ are the existing markets, namely the domestic market, South Africa and Portugal. South Africa and Portugal currently represent almost 75% of total arrivals and are expected to continue to dominate the market in the short to medium term. Swaziland and Zimbabwe, given their proximity and trends towards increased intra-regional travel, represent the secondary ‘natural markets’. Given the current economic and political situation, specific efforts to develop the Zimbabwean market will have to be postponed until the economic recovery of that country. Demand from these markets will mainly stem from the leisure, visiting friends and relatives and business sector, while for South Africa, the selected niche products, mainly water based such as deep-sea fishing and diving, will also be important and determinant.

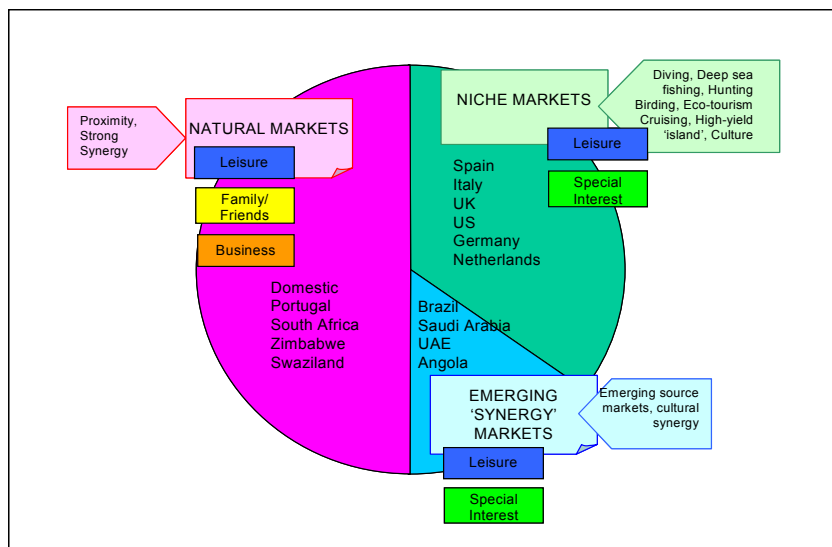
A niche marketing approach will be implemented towards selected source markets that are strategic to South Africa and that have strong potential for Mozambique’s strategic niche products. Product packaging with South Africa and development and marketing of ‘bush-beach’ linkages will be important.

The southern European markets of Italy and Spain have also been included in this category, though the approach towards these countries will be slightly different from the other countries and will concentrate on the high-yield luxury sun, sand and sea market. Demand from these countries will stem from the leisure, mainly concentrated on up-market beach tourism and special interest, including coastal adventure tourism (such as deep sea fishing and diving), eco-tourism and culture.

As a last category, emerging synergy markets have been identified; these are developing source markets that have a specific cultural synergy with Mozambique. Brazil emerges as a high potential emerging market due to cultural and language similarities between the two countries, and Saudi Arabia and the UAE have been selected based upon the relative proximity of Mozambique and religious synergy (Muslim).

Figure 10 graphically displays the three strategic market segments, their drivers, key demand categories and the source markets within each segment.

Figure 10 - Strategic market segments to Mozambique



4.8 Foundation Factors

A healthy tourism sector can emerge only in countries with a basic level of infrastructure provision and services. Tourism cannot be the driver of all requirements for its development as it draws very much upon the overall socio-economic infrastructure of a country. A minimum provision and quality of infrastructure, knowledge (e.g. tourism and immigration statistics, economic impact of tourism, market research, etc.), human resources, an adequate institutional framework (e.g. laws and law enforcement, governance, sectoral cooperation), safety and security and financial resources, are a requirement for the development of tourism.

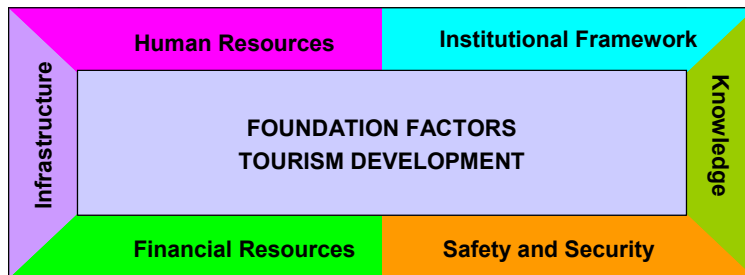
Without provision of these tourism development is effectively impossible. Neglecting one or more of the ‘foundation factors’ can have disastrous consequences for tourism development, and can lead to a disorganized implementation of tourism projects, without an adequate interconnection with the Government programs and objectives.

Though essential to tourism development, many of these factors, like infrastructure and safety and security, are not a direct responsibility of the national tourism administration, which makes tourism vulnerable to performance in other sectors. It also demonstrates that tourism should be seen as a national priority, where intersectorial intervention is crucial to guarantee that appropriate attention will be given to all foundation factors in all relevant sectors.

It is a responsibility of the national tourism administration to identify the minimum development requirements for all foundation factors, and to promote cooperation with other sectors in order to ensure that these factors are addressed in their programs and thus contribute to the development and implementation of national plans.

The continuous upgrading of the foundation factors is considered a priority and the Strategic Plan for the Development of Tourism addresses, in the implementation framework, the requirements of tourism for each of the above-mentioned factors.

Figure 11 - Foundation Factors for Tourism Development



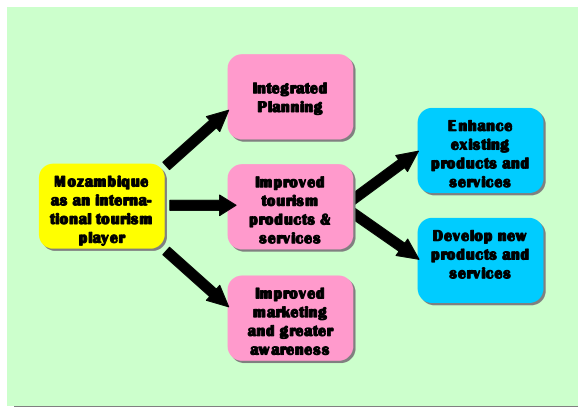
5 Core Implementation Processes

Three strategic implementation processes cutting across the critical success factors, the development of foundation factors and the use of Mozambique's key strengths emerge, that will guide and direct future strategies to develop Mozambique into an international player in tourism:

- 1) **Integrated Planning:** Apply sound principles for land-use planning and for organizational and financial planning and coordination, leading to a controlled and responsible growth of tourism.
- 2) **Product Development:** Improving existing tourism products and services and develop new products and services.
- 3) **Marketing:** Improving marketing efforts to create awareness by applying 'smart' marketing principles focused towards selected strategic source markets and niche markets and the domestic market.

These three processes are the 'core implementation processes' and must be implemented concurrently.

Figure 12- Core Implementation Processes for Tourism Development in Mozambique



5.1 Focus and Spatial Framework of Tourism

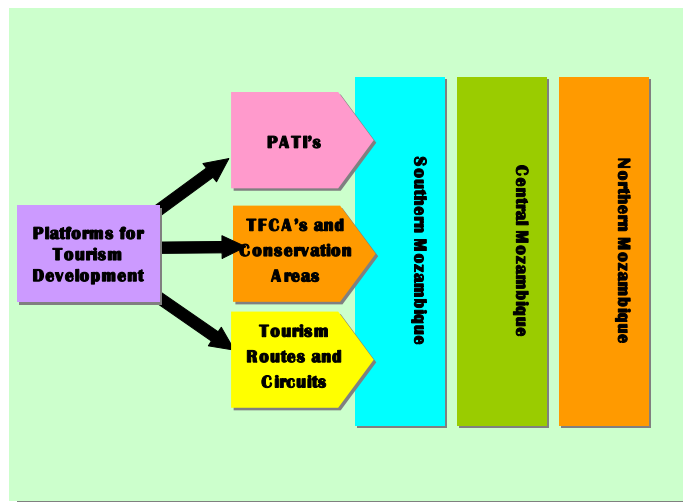
Mozambique has the resource potential to develop into a world-class tourism destination. However, it is still at the very early stages of development and many constraints for development are still to be overcome. Human and financial resources and capacity are very limited and it will be impossible to develop the whole country at the same time. Tourism is spatial in nature and, therefore, three platforms have been identified for its development, namely: (1) the Priority Areas for Tourism Investment (PATIs), (2) the Transfrontier Conservation Areas (TFCAs) and (3) the Tourism Routes. There is, however, some measure of overlap between these three platforms, for example some PATIs cover all or part of some TFCAs or Conservation Areas. The first two (PATIs and TFCAs) are indicated as "destinations".

However, a destination is two-fold, as it should have sufficient attraction, e.g. in the form of natural assets, but should also have a basic level of infrastructure and services, such as access, accommodation, supply services and activities. All PATIs, TFCAs and Conservation Areas established in the plan fulfil the requirement of ‘attraction’ but few offer the necessary set of services as yet. As per the definition above, not all PATIs, TFCAs and CAs are effectively ‘destinations’, but as they constitute the future destinations of the country they are considered in this Strategic Plan as the country’s ‘destinations’.

The linkages between these ‘destinations’ are added as the last platform for delivery of this Strategic Plan. These linkages are the routes connecting the various destinations. The routes are depicted in a logical way, forming tourism circuits connecting the country’s tourism destinations. It is envisaged that TFCAs, PATIs and Routes are implemented at the regional level, thus creating three clusters of destinations or tourism circuits: in the South, Centre and North.

On the other hand, a second concept critical to guide marketing and positioning of the country, as well as the organization of governance structures, are the ‘Mozambique Regions’.

Figure 13 - The Elements of the Spatial Framework of Tourism in Mozambique



5.2 Mozambique’s regions

The country is too vast and diverse to be considered and managed as a single destination. The three regions of Mozambique, the South, Centre and North, have each their own identity, resource strengths, development priorities and regional partners.

The ‘focus areas’ and the ‘Mozambique Regions’ are the spatial platforms for the implementation of the ‘SPTDM’.

Box 8 – The Profiles of the Three Regions of Mozambique

Southern Mozambique: Provinces of Maputo, Maputo Cidade, Gaza and Inhambane
Regional/domestic market: sun, sand and sea and water sports.

International market: niche approach: diving, eco-tourism and culture.

The South of Mozambique will continue to be featured as the main destination for regional and domestic markets, with emphasis on sun, sand and sea, family holidays, water sports and entertainment and fun. The South will also be actively marketed to international markets, but based on 'activity niches' and 'Icons' of the region. Key activities are diving and 'large marine animal spotting' and 'Icons' in the South are: Limpopo TFCA (eco-tourism), Maputo Elephant Reserve (eco-tourism), Bazaruto (luxury sun, sand and sea), Inhambane (culture and diving) and Maputo (culture and entertainment).

Central Mozambique: Provinces of Sofala, Manica and Tete

Niche approach to all geographic markets focusing on eco-tourism.

Regional and domestic markets: business and commerce and sun, sand and sea (Zimbabwe).

The central region is characterized by its wealth of eco-tourism and adventure opportunities. 'Icons' like Chimanimani, Cahora Bassa and Gorongosa will have to be developed and positioned to mainly international and regional markets. Key activities for marketing and simultaneous product development are hiking, fresh-water fishing, birding and hunting. The product will appeal mostly to independent adventure travellers (including backpackers) and to 'overlanders'. For domestic and near-by regional markets (Zimbabwe) "business and commerce" and 'sun, sand and sea' are of secondary importance.

Northern Mozambique: Provinces of Cabo Delgado, Nampula, Niassa and Zambézia.

Exclusive destination for affluent segments. Image of exclusive beach, island and eco-tourism destination with strong cultural influence.

Northern Mozambique will be Mozambique's most exclusive destination. Marketing and product development initiatives should strongly feature the exclusive and wilderness character of the region. Exclusive small resorts will arise along the coast and islands of Cabo Delgado and Nampula. Strong 'Icons' of the North are Pemba, the National Park and the archipelago of Quirimbas, Ilha de Moçambique, Niassa Reserve and Lago Niassa. Exclusive eco-tourism (adventure, birding, hunting, lake based activities) to be developed mainly in remote areas of Niassa and Cabo Delgado Province.

5.3 Definition of Priority Areas for Tourism Investment

The prioritisation of tourism areas has been an approach adopted by government since colonial times. Zones have been defined and redefined over a period of time but they tended to be too large for realistic planning, given limited resources, and were without clear institutional frameworks regarding responsibilities for implementation. Prioritisation is still a necessity, so a methodology has now been developed to provide substance to this. This methodology is consultative, scientific and practical and draws upon a combination of local knowledge, the National Tourism Policy and its defined priorities, and the international and regional experience in tourism planning and development.

The following criteria for defining PATIs were work-shopped with a cross-section of national, provincial and local stakeholders:

- **Distance** – the area should be within 3 or less hours drive from an air gateway;
- **Maximum product and marketing potential** – marine parks, world heritage sites, national parks, Transfrontier Conservation Areas (TFCAs), significant inland water, trade and investment centres, ports, quality beaches, biological diversity, existing and potential tourism “icons”;
- **Population density** – taking into account both low and high density population scenarios in the kind of resorts and destinations to be built;
- **Infrastructure and access** – existing and planned levels of infrastructure, particularly related to roads and air utilities;
- **Accommodation** – existing and planned volume and quality of accommodation;
- **Clustering** – logic of the clustering of accommodation and tourism attractions enabling both to be accessed from a common centre;
- **Linkages to national economic initiatives** – existing or potential linkages to major national and regional sectoral initiatives with greater economic and environmental impact (e.g. spatial development activities (SDIs), TFCAs, Development Corridors, etc); and
- **Strategic areas** – area of strategic national importance from a product, market and/or infrastructure development perspective.

The criteria were then weighted and mapped using Geographical Information Systems (GIS), and the outputs are as follows: a map showing the ‘Tourism Aesthetic Potential’, where the physical characteristics of the country such as elevation, land use, land cover, coral reefs, etc. are presented; the other map evaluates the country’s tourism potential based upon infrastructure and anthropological criteria, such as population, infrastructure, electricity, existing tourism accommodation, etc. The darker areas on this map indicate the higher tourism potential areas.

5.4 The Dual Approach Towards the Development of Tourism Destinations

The PATIs, TFCAs and the linkages between them, and the routes are viewed as the key vehicle for the implementation of this Strategic Plan for the Development of Tourism.

Existing tourism development, along with the existing levels of socio-economic and infrastructure development, are not equally divided throughout the country. Some of the PATIs, especially those in the South, have already achieved significant levels of development, while others, especially those in remote areas with difficult access, are still relatively undeveloped. Different strategies will be required to steer tourism development in the various PATIs, with almost opposite characteristics of tourism and socio-economic development. In this context, for ease of implementation and classification, a dual approach has been chosen to deal with these various types of PATIs, based on the existing level of tourism development, access and socio-economic development.

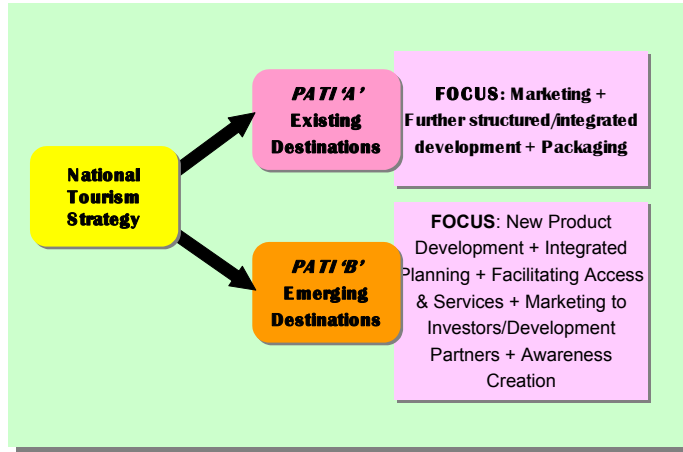
Type ‘A’ PATIs already have a certain level of tourism development and tourism infrastructure. These areas have already appealed to, or are of high interest to investors and a variety of accommodation options and products have emerged. The level of infrastructure provision and the quantity and quality of tourism products is in many cases far from perfect but minimum facilities exist. Priorities in these areas point to a controlled development, integration of development plans among sectors, development of human resources and a requirement for marketing of existing products.

Type ‘B’ PATIs are those areas that have been selected as Priority Areas mainly because of their high tourism potential or their strategic location, but that effectively have no significant levels of tourism development yet. Many of these areas are difficult to access, have low

levels of basic infrastructure and service provision and levels of socio-economic development. The priorities for these areas point towards infrastructure improvement, integrated planning and investment promotion.

This dual approach towards destination development will guide further structuring of the Strategic Plan for the Development of Tourism.

Figure 14 - Dual Approach Towards Development of PATIs



The PATIs are shown on the map with a symbolic form of a circle. Demarcation of the actual area within the PATI through provincial planning processes will determine the final shape for each PATI. Size and shape might vary between the PATIs. At this stage, the PATIs are still a concept and implementation will bring life to actual form, activities and development in each PATI.

The identified PATIs will be the focal points in the planning and resources allocation in tourism. The objective is to create reference centres and planning, investment and sustainability models in tourism that will be replicate all over the country.

Figure 15 – Aesthetic tourism potential

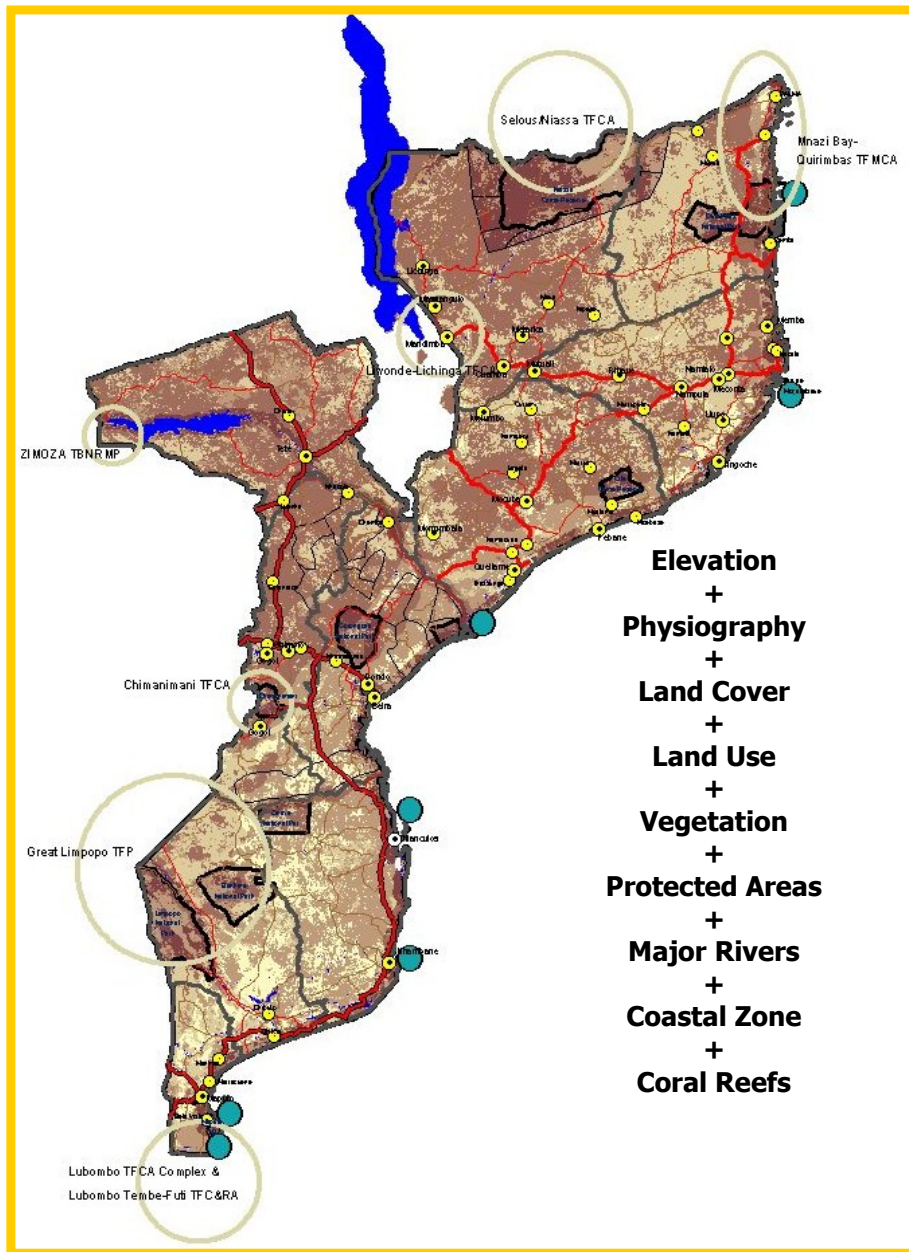
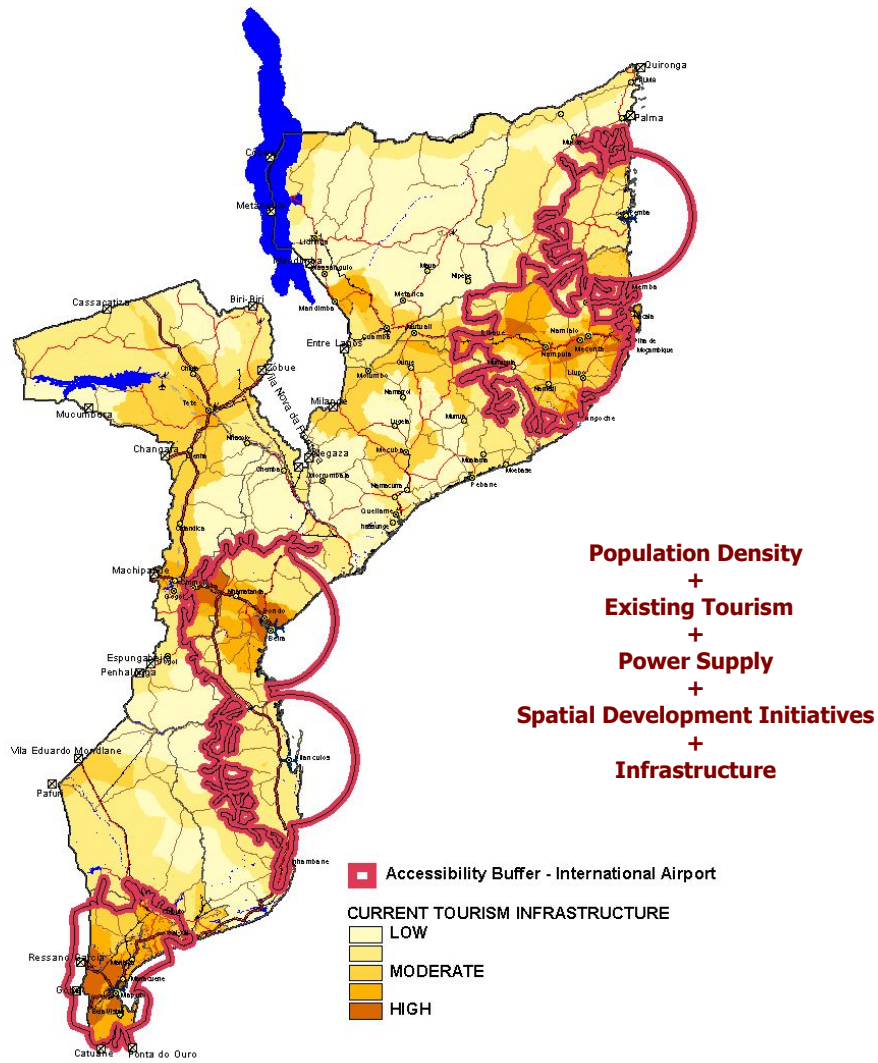


Figure 16 – Total existing tourism accessibility and infrastructure



The following table summarizes the PATIs identified, and provides high-level guidelines regarding the type of products and market segments that apply to each PATI.

The following map combines the tourism aesthetics and tourism infrastructure in one map. This map is used as the base to select the Priority Areas for Tourism Investment. Eighteen areas have been identified as PATIs; three areas as type “A” or existing destinations; five as type “A/B” destinations with limited existing tourism development; and ten as type ‘B’ destinations, areas with high potential to develop into a tourism destination but with very few products and services developed yet.

Figure 17 – Priority Areas for Tourism Investment

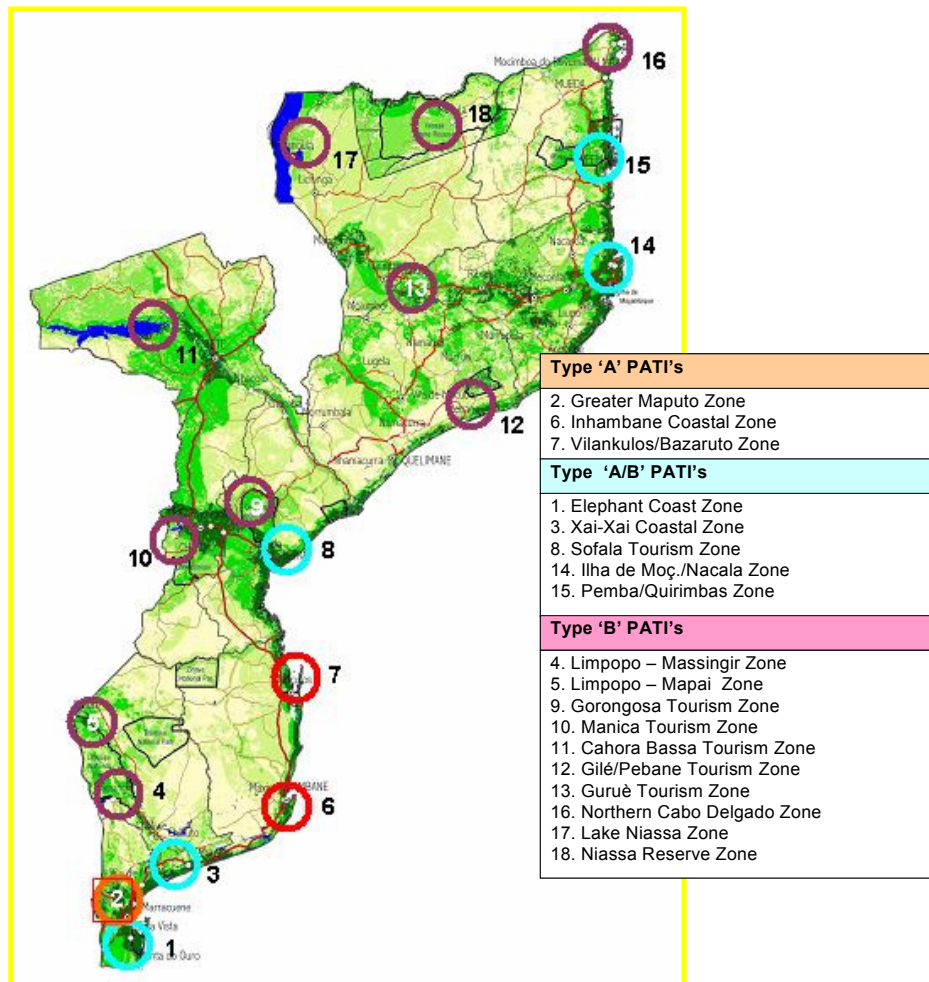


Table 10 – Priority Areas for Tourism Investment (PATIs)

Priority Areas for Tourism Investment (PATIs)				
Existing Destinations (Type 'A')				
Zone	Type	Name & Location	Key Products	Market segments
2	A	Greater Maputo Zone – includes Maputo Cidade, Marracuene and Inhaca	Urban/business tourism Sun, sand and sea Culture Ecotourism	Domestic, regional and international business International transit, leisure & VFR (friends and relatives), Domestic leisure & VFR

6	A	Inhambane Coastal Zone – includes from Inharrime to Massinga, in Inhambane Province	Sun, sand and sea Water sports Culture	Domestic leisure Regional, International leisure Special interest and backpackers
7	A	Bazaruto Vilankulos Zone – includes Bararuto Archipelago and coast from Vilankulos to Inhassoro, Inhambane Province	Coastal eco-tourism Sun, sand and sea Water sports	International leisure Regional leisure

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 Catembe and Ponto do Ouro in Maputo Province	Coastal eco-tourism Water sports Sun, sand and sea	Regional, domestic leisure International leisure and high yield niches
3	A/B	Xai Xai Coastal Zone – coastal zone of Bilene to Lagoon Chidenguele, in Gaza Province	Sun, sand and sea Water sports Culture	Regional leisure Domestic leisure
8	A/B	Sofala Tourism Zone – includes Beira, Sofala, Savane along coast, in Sofala Province	Urban tourism Sun, sand and sea Culture, coastal eco-tourism	Domestic and regional MICE and business Domestic leisure Regional leisure
14	A/B	Ilha de Moçambique–Nacala Zone – Includes Baía de Mocambo in the south to Baía de Memba in north of Nampula Province	Culture Sun, sand & sea Water sports	International leisure niches Regional leisure
15	A/B	Pemba – Quirimbas Zone – includes Pemba Bay to Ilha de Materno and marine and terrestrial parks of the Quirimba National Park in Cabo Delgado Province	Sun, sand and sea Water sports Culture Eco-tourism	International leisure niches Regional leisure

Emerging Destinations (Type 'B')				
Zone	Type	Name & Location	Key Products	Market segments
4	B	 Limpopo Massingir Zone – includes town of Massingir, Lake Massingir and southern Limpopo National Park in Gaza Province	Eco-tourism, Adventure Special interest Water sports Culture	Domestic and regional leisure Domestic and regional MICE International leisure Eco-tourism niches
5	B	 Limpopo Mapai Zone – in Gaza Province at Mapai, northern Limpopo National Park	Eco-tourism, Adventure Special interest	Domestic leisure Regional and international leisure Eco-tourism niches
9	B	Gorongosa Tourism Zone – includes Gorongosa National Park and Gorongosa Mountain.	Eco-tourism, birding	International and domestic leisure and eco-tourism niches

10	B	Manica Tourism Zone – includes Manica, Chicamba and the northern region of Chimanimani Reserve, in Manica Province	Eco-tourism Adventure Culture Special interest	International and regional backpackers and overlanders Eco-tourism niches
11	B	Cahora Bassa Tourism Zone – includes Songo, parts of Lake Cahora Bassa and community area of tourism of Tchuma Tchato, in Tete Province	Eco-tourism Adventure Special interest Culture	Eco-tourism niches Backpackers and backpackers Special interest
12	B	Gile Reserve – Pebane Tourism Zone – in Zambezia Province, includes the reserve of Gilé and Pebane beach area.	Eco-tourism Sun, sand and sea Culture Special interest	Domestic leisure market International niches
13	B	Guruè Tourism Zone – Gurue zone, in Zambezia Province	Adventure Eco-tourism Culture	Domestic leisure International and regional niches
16	B	Northern Cabo Delgado Coastal Zone in Cabo Delgado Province, including Palma and Mocimboa da Praia to the border with Tanzania in the northern zone.	Sun, sand and sea Water sports Culture	International leisure Regional leisure Special interest
17	B	Lake Niassa Tourism Zone – in Niassa Province – includes lake shore from Metangula to Còbuè, eastward into Manda Wilderness	Eco-tourism Water sports	International leisure Regional leisure Special interest
18	B	Niassa Reserve Zone – in Niassa Province – includes the reserve and the hunting blocks in the reserve.	Eco-tourism Culture Special interest	International eco-tourism niches

5.5 Development of Strategic Tourism Routes and Circuits

5.5.1 Importance of Routes

The identification and marketing of routes is a powerful concept in tourism development. It is based on the idea that a group of products providing diversity of experience is more attractive than the individual components. Box 9 outlines some reasons why routes are important.

The development of routes is also critically important because it not only identifies a spatial relationship between diverse products, but also focuses attention on potential attractions that might possibly be missed by tourists when planning their itineraries. They can also constitute an important marketing tool, in that they provide options to offer packages that can be tailor-made to suit a client's interests.

Routes provide linkages between PATIs and destinations, but are also essential elements of any tourism spatial framework. Routes generally link therein points in space and experiences.

Two types of routes are identified: Primary Transport Corridors and Tourism Routes or Visitor's Journeys.

Box 9 – The Value of Tourism Routes

- Tourists don't necessarily take the shortest and quickest route, but rather tend to balance the "effort of getting there" with the quality of the experience and safety.
- Proper planning and promotion of routes can influence and change tourist travel patterns.
- Routes do not only apply to road travel. Rail, air and sea routes are integral components of moving tourists from destination to destination.
- Routes can provide a credible platform for marketing and quality control of tourism providers. Good examples include the well-known routes in South Africa, the "Garden Route" and the "Wine Route" in the zone of Cape.

It is important to note that routes do not only apply to road travel. Rail, air and sea routes are integral components of moving tourists from destination to destination. For example in Mozambique, air access between priority areas and air linkages between national and regional destinations is as important as road travel, due to cost and time efficiency, the early stage of maturity of development and the ability to open new destinations in the longer term. Rather than limiting the scope of the routes to a single product or theme, routes should integrate different products and expose visitors to diverse experiences.

5.5.2 Primary Corridors

The primary corridors offer the shortest or most convenient routes between two points. The corridors, shown in Table 11, have been identified as most urgent for the overall development of Mozambique. These corridors follow existing transport and trade routes. Accessibility of attractions and infrastructure will begin to reshape consumption patterns, thereby focusing tourism. The corridors are also important access and supply routes into Mozambique from neighbouring countries.

Table 11– Primary Transport Corridors in Mozambique

Primary transport corridors	
<ul style="list-style-type: none"> ■ N4 (Maputo Corridor): Johannesburg – Maputo ■ EN1(Coastal Route): Maputo – Beira ■ EN6 (Beira Corridor): Beira – Harare 	<ul style="list-style-type: none"> ■ Tete Corridor: Tete – Malawi ■ Nacala Corridor: Nacala – Lilongwe

5.5.3 Tourism Routes

Secondary distributor routes represent tourism routes or "visitor journeys" between gateways and major attractions in the country.

This type of tourist route fulfils a threefold function, namely they enable the construction of a critical mass of tourist product, they introduce tourists to a broader experience of Mozambique and they create economic opportunities. 'Routes' relate to *national* 'visitor journeys' while 'Circuits' refer to *regional* (between countries) tourism movement in tentative circular patterns. Tourists do not necessarily have to follow a route or circuit from start to finish but can travel according to their available time, resources and interests on a certain part of a route or circuit. The majority of Mozambican tourism routes can be part of regional tourism circuits.

Table 12 outlines the proposed future routes that should be developed and promoted over the timeframe of this Strategic Plan.

Figure 18 – Tourism Routes and Circuits

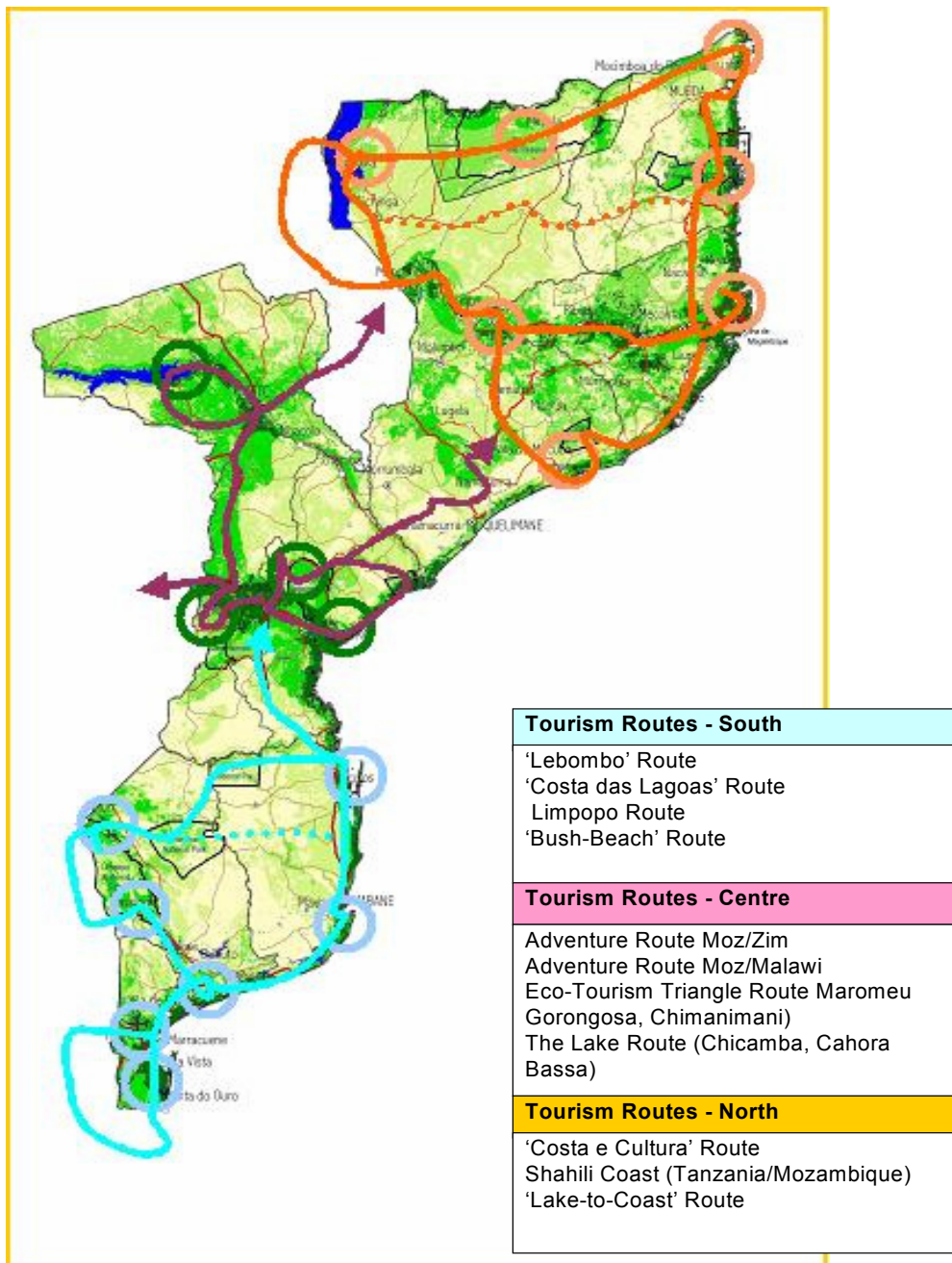


Table 12 – National Tourism Routes and Regional Tourism Circuits

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, national heritage, water sports, cultural diversity, scenic beauty, special interest activities that 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 Ponta 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.).
Great Limpopo 'bush-beach' Circuit	(Johannesburg) – Nelspruit – Kruger National Park (SA) – Limpopo National Park – (Pafuri – Gonarezhou National Park (Zim) – Mapai) – Banhine National Park – Zinave National Park – Vilankulos – Bazaruto – Inhambane – Xai-Xai – Bilene – Maputo
	An exciting route bringing together eco-tourism, culture and coast. Capitalizes on existing flows into KNP. To many international visitors this will represent a 'dream holiday' connecting the world's largest game park with the pristine beaches and tropical islands of Mozambique. Departure in RSA (Johannesburg or Nelspruit) or follow in reverse order with start in Maputo.
Limpopo Route	Maputo – Bilene – Chokwe – Massingir – Limpopo National Park – Kruger National Park (RSA) – Malelane – Komatipoort (SA)- Ressano Garcia – Maputo
	An eco-tourism focused consolidated version of the Great Limpopo Bush-Beach Route. This route enables a relatively quick inclusion of Mozambique in regional tourism and provides visitors, after a taste of beach, with direct access into the Great Limpopo Transfrontier Park. Stipulates being a circular route with start and end in Maputo.
Tourism Routes in Central Mozambique	
Adventure Moz/Zim Route	Inhambane – Vilankulos – Gorongosa – Lake Chikamba – Manica – Chimanimani – Zimbabwe

		Targeted at the backpacker and overlander market, the central region is already a “through route” from the Mozambican beaches to the African hinterland. The challenge is to provide critical mass of market ready attractions and tourism facilities and amenities in order to increase length of stay. Strategic links should be created that begin to bring strong local attractions such as Gorongosa and Chimanimani into visitor itineraries. The Moz/Zim Routes focuses routes from the Mozambique southern beaches into Zimbabwe via Machipanda/Mutare, after visiting the eco-tourism destinations along the Beira corridor.
Adventure Route Moz/Malawi		Inhambane – Vilankulos – Gorongosa – Lake Chikamba – Cahora Bassa – Tchuma Tchato – Malawi
		As above but focusing en-route to Malawi with emphasis on the Tete eco-tourism destinations of Cahora Bassa and Tchuma Tchato.
Central Eco-tourism Route		Beira – Marromeu Reserve – Gorongosa National Park – Gorongosa Mountain – Chimoio – Chimanimani Reserve – Lake Chicamba – Manica – Beira
		A circular route combining the eco-tourism highlights of Sofala and Manica Provinces. Rich in bird-life and hiking opportunities, this route will appeal to many eco-tourism enthusiasts.
Central Lakes Route		Beira – Lake Chicamba – Chimoio – Tete – Cahora Bassa – (Malawi – Lake Niassa)
		An eco-tourism focused route combining the ‘great’ lakes of the central and northern region (Niassa Lake). Lake Chicamba is known for its giant bass fish and the Cahora Bassa dam lake for its abundant and large tiger fish. Lake enthusiasts might extend the trip through Malawi to Lake Niassa for magnificent fresh water diving.

Tourism Routes in Northern Mozambique	
Northern Coast and Culture Route	Nampula/Nacala – Ilha de Moçambique – Pemba – Quirimbas
	The only short-term route in the North links the UNESCO cultural world heritage of Ilha de Moçambique with tropical beaches and virgin islands, warm waters and rich and diverse marine resources. The eco-tourism opportunities in the Quirimbas and the cultural experience in Ilha do Ibo complete this discovery journey of Northern Mozambique’s treasures.
Swahili Coast Route	Zanzibar – Bulawayo – Pemba (Tan) – Palma – Mocímboa da Praia – Quirimbas – Pemba

		A long term opportunity linking the coastal experiences of Mozambique and Tanzania. Success depends on the development of the Northern Cabo-Delgado PATI on the Mozambican/Tanzanian border, the Mtwara Corridor and the southern circuit in Tanzania. Culture of the region's peoples and rich trading past, the stunning beaches and water sports opportunities are the key elements joined together by this route.
Lake to Coast Route		Pemba – Quirimbas – Niassa Reserve – Niassa Lake
		A long term route connecting the warm waters of the Indian Ocean with the fresh waters of Lake Niassa. A consolidated version of this route, Pemba – Niassa Reserve, joining the pristine beaches of Cabo Delgado with the absolute wilderness of Niassa is already being operated mainly for hunters and other niche markets. Infrastructure is at present a constraint and major investments in roads and air traffic will be necessary.
Northern Route	Discovery	Nacala/Ilha de Moçambique – Nacala Corridor – Nampula – Gurué – Cuamba – Lichinga – Metangula – Niassa Reserve – Palma – Quirimbas – Pemba – Nacala
		A circular route connecting all the Northern PATIs. The vast distances and lack of infrastructure will require an air network between the PATIs. The route brings together culture, beach and true wilderness.

Each route varies in length, time of travel and available infrastructure. Recognition of the opportunity to create value from these routes enables tourism to identify, plan and communicate its requirements to the transport and public works authorities, and to place these in the overall pipeline for decision-making regarding the provision of roads and infrastructure.

6 Implementation of the Strategic Plan

6.1 Implementation Framework

The implementation framework provides a structure and system for delivery of the Strategic Plan. It identifies the practical and pragmatic actions and interventions necessary to guide tourism development over the next ten years in Mozambique.

The Implementation Framework provides a Model for the Development of Tourism in Mozambique with five key implementation areas and action plans.

The Model for the Development of Tourism in Mozambique outlines the strategic input for a successful tourism development and highlights the strategies presented in the Strategy for the Development of Tourism in Mozambique.

Five areas of critical importance for implementation have been focused upon:

- The Institutional Structure and the Management and Coordination of PATIs and TFCAs
- Integrated Development Planning
- Human Resource Development
- Marketing
- Conservation

The Implementation Framework identifies the various elements and factors influencing successful tourism development and ultimately has as its aim the realization of the tourism objectives in a wider vision: the Vision 2025. Three core processes have been identified for the implementation of the Strategic Plan: **Integrated Planning, Marketing and Product Development**.

The following are the elements of the Implementation Framework:

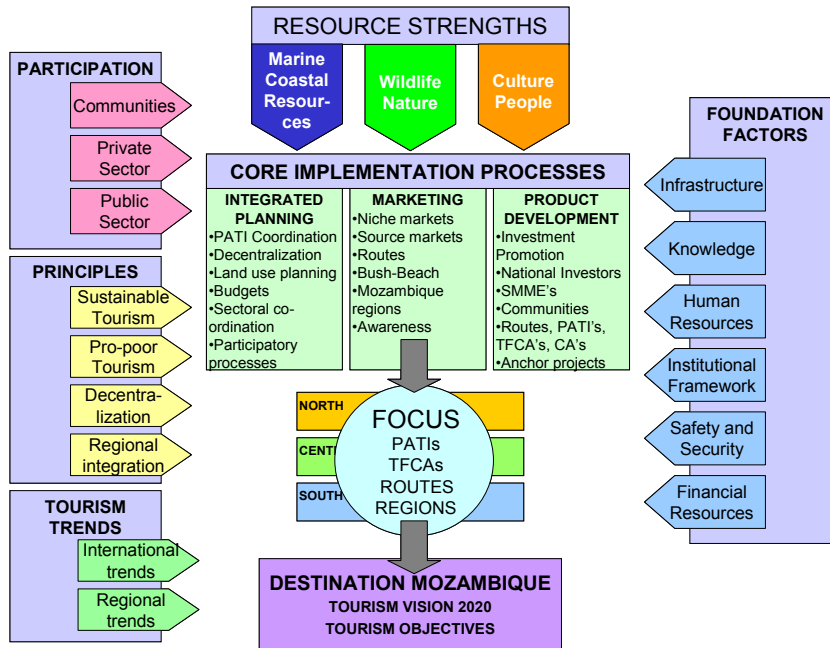
■ Resource Strengths

Mozambique's key resource strengths are: the quality of its beaches and coastal resources unique to southern Africa, the diversity and quality of its natural and wildlife resources and the opportunities these provide for tourism development and the cultural identity of Mozambique, determined by its heritage, people and history, that significantly differs from other countries in southern Africa. These resources must be cherished and continuously developed and protected to guarantee the 'attraction' value of 'Destination Mozambique'.

■ Foundation Factors

A minimum provision of quality infrastructure, knowledge (e.g. tourism and immigration statistics, economic impact of tourism, market research, etc.), human resources and an adequate institutional framework (e.g. laws and law enforcement, governance, sectoral cooperation), safety and security and financial resources, are a requirement for the development of tourism. Without at least a basic provision of these factors tourism development is effectively impossible. It is a responsibility of the National Tourism Administration to identify the minimum development requirements for all 'foundation factors' and to promote the establishment of national plans to continuously upgrade the development levels and actual provision of these factors. The Strategic Plan for Tourism Development in Mozambique identifies the development objectives and priorities for each of the 'Foundation Factors' as they relate to tourism development.

Figure 19 – Forces and processes in tourism development



■ **Participation**

Tourism development is a complex process shaped by interactions between many stakeholders. Their commitment, involvement, contribution to and ownership of plans and processes are fundamental to sustainable tourism development. The Strategic Plan for Tourism Development in Mozambique recognizes the importance of collaboration among communities, private sector and public sector at national, provincial and district level across sectors for tourism development and gives guidance to the role these entities should play as well as how to best coordinate their interaction.

■ **Principles**

The fundamental philosophies that influence tourism policy and strategy definition process have been identified as principles. These include internationally accepted ‘best practices’ that lead to environmentally and socially sustainable and responsible tourism management, as well as national governance models that seriously affect the structure of the sector. ‘Sustainable tourism’, ‘pro-poor tourism’, ‘decentralization’ and ‘regional integration’ have been identified as the core principles determining sound tourism development in Mozambique. The underlying philosophy of the ‘Strategic Plan for Tourism Development in Mozambique’ is based upon these principles and their values and influences are reflected throughout the strategy.

■ **Tourism Trends**

Tourism trends are the consumer and industry patterns that determine the worldwide market for tourism and the tourism products people are seeking. Product development and marketing must be geared towards the tastes and requirements of today’s consumers,

and an understanding of future needs is essential for new product development. The SPTDM is based upon a thorough analysis of international and regional patterns in consumer preferences, tourism products, and economic and social trends.

■ **Core Implementation Processes**

Implementation of the core processes will lead to realization of the tourism objectives. The core implementation processes are underpinned by sound development processes relating to the ‘foundation factors’, effective participation between communities, private and public sector, and effective management and development of the ‘Resource Strengths’.

‘Integrated Planning’, ‘Marketing’ and ‘Product Development’ are the core processes for tourism development in Mozambique. **Figure 18** details the basic concepts for each of these central processes.

■ **Focus**

TFCAs (Transfrontier Conservation Areas), PATIs (Priority Areas for Tourism Investment) and Tourism Routes are the identified locations where resources for tourism development will be concentrated. A second concept critical to guide marketing and positioning of the country and for developing governance structures, are the ‘Mozambique Regions’. The country is too vast and diverse to be considered and managed as a single destination. The three regions of Mozambique, the South, Centre and North, each has its own identity, strengths, development priorities and regional partners. The “spatial focus” areas and the ‘Mozambique Regions’ are the spatial platforms for implementation of the SPTDM.

■ **Destination Mozambique**

The successful implementation of the SPTDM will lead towards the realization of the “Tourism Vision 2025” and the “Tourism Objectives”. These define the overall objectives Government aims to achieve through the development of a thriving tourism sector and a balance between economic, socio-cultural and environmental interests.

6.2 Institutional Framework for Tourism Development in PATIs and TFCAs

The Priority Areas for Tourism Development (PATIs) and their connecting routes are the foundation of this Strategic Plan for the Development of Tourism. Turning the PATI concept into a reality will be a major challenge and will require significant coordination and resources at national, provincial and district levels.

Key tasks associated with the implementation of the PATIs concept are:

- Coordination at national, provincial and district level;
- Integrated development planning;
- Design and development standards;
- Investment promotion;
- Awareness creation.

6.3 Integrated Development Planning

Integrated Development Planning (IDP) is one of the core processes that will lead to successful tourism development in Mozambique. IDP intends to promote development across all sectors in a prioritised, integrated way. It is a generic process that can be applied within any sector, but the more it connects sectors the more meaningful the integration. As such it must:

- Link, integrate and coordinate plans and take account of proposals for development of the area;
- Align the resources and capacities of the responsible authority with the implementation of the plan;
- Form the policy framework and general basis for budgeting.

The advantages of implementing IDP as a process common to all parties are that it becomes easier to define shared goals, integrate and share resources and achieve synergy. It is not a process that should be owned and operated by one agency, it is an inclusive process that should be institutionalised by all parties so that together they are able to achieve shared goals they could not otherwise achieve. To be effective, IDP needs to be championed by a 'Lead Agent' that can be held accountable for the overall process, operating with committed and accountable support from partner organizations.

Tourism is not ultimately responsible for integrated development planning, but given its spatial nature, a controlled and planned development at the 'destination' level is of utmost importance for the coordinated growth of the sector. It is the role of MITUR to make sure tourism is integrated in overall national, provincial and district policy, planning and strategy development processes, as well as to promote and advocate Integrated Development Planning processes at the district, municipality and provincial levels, especially in those areas with a high potential for tourism.

- The sector considers Integrated Development Planning as the foundation for the controlled development of the tourism sector and for the achievement of internationally accepted standards in tourism;
- The Ministry of Tourism is not the lead agency in implementing IDP but will play a key role in cultivating a culture towards IDP and in promoting and advocating its principles at national, provincial and local levels;
- A set of directives have been defined relating to integrated tourism planning at national level, to integrated tourism planning at provincial and district level and to zoning (Reference to Tourism Policy and Implementation Strategy, April 2003). The sector considers the implementation of these directives as a priority;
- The Ministry of Tourism will support, as far as possible, existing IDP initiatives and the existing implementing agencies. It will avoid duplication of efforts or create 'tourism only' IDP processes. MITUR will support, and where possible will strengthen, the existing IDP processes implemented through the MICOA agency CDS and the Strategic

Environmental Assessment, leading to macro-zoning proposals in districts and municipalities;

- The central administration advocates decentralization in IDP processes and will support local IDP initiatives, providing steering and guidance where necessary, and build capacity where possible at the local level to ensure sound IDP processes and the proper inclusion of tourism in these processes.

6.4 Human Resource Development

Mozambique is still recovering from a long period of social and economic instability and the development of human resources is recognized as a national priority across sectors. There are considerable gaps in experience and expertise in the public and private sectors that need to be addressed if the country is to reach its potential as an international tourism destination and maximize economic benefit achieved. In line with national priorities, training and education and human resource development in tourism, conservation, hospitality and related areas are therefore considered as fundamental to the development of tourism in Mozambique.

6.4.1 Human Resource Development Strategy for the Tourism Sector

The human resource development strategy for the tourism sector identifies two major challenges for tourism in Mozambique. The first is the need to successfully compete in a global economy characterized by increased competition and globalisation. The second is the need to eliminate poverty and address issues of inequality. The challenge facing the country as a tourism destination is therefore twofold. In the first instance, how to deliver tourism experiences equal to the best in the world. Secondly, channelling the potential economic and social benefits of tourism to as broad a range of beneficiaries as possible, but especially to those in greatest need of access to economic opportunity.

The general lack of human capacity is partly a reflection of a relatively young tourism sector, of a lack of major operators with international expertise to make a difference, but also lack of formal training programmes and qualifications. The current level of training is insufficient and many small operators have no formal training at all. As a consequence of this, the level of service and product quality is generally low. Capacity in public sector is also very weak. Founded in 2000, the Ministry of Tourism is still a relatively young Ministry. In general, the Ministry is understaffed at national and provincial levels and skill levels are low. An urgent requirement exists to built capacity at all skill levels and across the functional and provincial departments.

The development of human resources is a cornerstone in overcoming these challenges. There are three key requirements for a successful tourism destination:

- 1) A competent and motivated tourism labour force;
- 2) Skills development, training and career development; and
- 3) Government officials with the capacity and desire to deliver on tourism objectives and maximize economic and social benefit to the population.

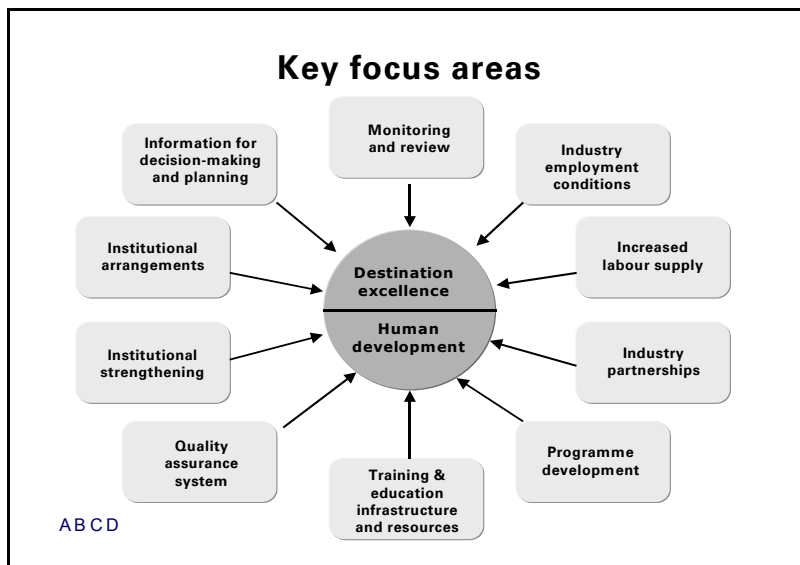
Achievement of the above milestones will direct the future development of the tourism sector in Mozambique, not only in the next five years but also into the foreseeable future.

Based upon these milestones, the following strategic objectives have been developed to guide implementation of the tourism human resource development framework:

- invest in people’s development to ensure sustainable tourism growth;
- promote the employment of nationals across all skill levels in tourism and related sectors, including conservation areas and sectors dedicated to support their functioning through training and capacity building;
- adopt appropriate measures in order to address tourism labour supply issues and implementation of national standards of skills training and education;
- commit to developing and investing in an education system that will lead to self-sufficiency and reduced reliance on imported skills;
- develop human resources qualified for the management and fiscalization of Conservation Areas, considering the importance of Conservation Areas for the tourism sector and the importance of a natural resources and wildlife based tourism; and
- support the involvement of private sector and accredited private sector driven institutions in the provision of education and training.

The tourism human resource development strategy is based around 10 focus areas, both influencing the two fold strategic goals of ‘destination excellence’ and ‘human development’. The focus areas identified above have been converted into strategic goals that will inform the development of human resources over the next five years.

Figure 20 – Key focus areas for the Strategy for the Development of Human Resources in Tourism



6.5 Marketing

Mozambique is not yet perceived as an international tourism destination. The public perception of Mozambique is still affected by a past of political unrest, natural disasters and socio-economic problems, and is unfortunately little influenced yet by the rich natural and cultural assets that Mozambique hosts. Changing perceptions through marketing will take time. Marketing must therefore be undertaken as a parallel process to product development and improved infrastructure provision. The national marketing effort is still weak, with the institutional capacity still being built and very few human and financial resources available. Little support and guidance is available to regional and provincial marketing efforts and no comprehensive national brand or marketing image has been built yet for the country and its regions.

The National Tourism Policy and Strategy acknowledges the importance of marketing for tourism growth. The sector is committed to create adequate institutional arrangements aiming to establish a renewed focus on marketing and an improved engagement of the private sector.

The implementation framework emphasizes the importance of three principles that should underpin the marketing effort in Mozambique, namely (1) market segmentation, (2) branding and image diversification of Mozambique's regions, and (3) the use of information and communication technologies.

The strategic market segments (strategic niches and strategic source markets), Mozambique's regions and the tourism routes are key concepts for the national marketing. These have been summarized in Table 13.

Table 13 - Strategic Marketing Focus for Mozambique

Summary Strategic Marketing Focus for Mozambique		
Market segments	Domestic	(1) Business, (2) Leisure, (3) MICE
	Regional	(1) Business, (2) Leisure, (3) MICE, (4) special interest
	International	(1) Visiting Friends and Relatives (VFR), (2) Leisure, (3) Business, (4) special interest
Niches	Diving, Eco-tourism, Birding, Hunting, Hiking, Adventure, Cruising, Deep sea-fishing, luxury 'island' market, and sun, sand and sea.	
Source Markets	1. "Natural markets": domestic market, Portugal, South Africa, Zimbabwe, Swaziland 2. Niche markets: Spain, Italy, UK, Germany, US, Netherlands. 3. Emerging 'synergy' markets: Brazil, Saudi-Arabia, UAE, Angola	
Mozambique Regions	South	Regional/Domestic: Sun, sand and sea and water sports. International market, niche approach: diving, eco-tourism and culture
	Centre	Niche approach to all markets focusing on adventure and eco-tourism, and focus on business and commerce and sun, sand and sea to domestic and nearby regional markets.
	North	Exclusive destination for affluent segments, mainly marketed to international markets. Image of exclusive 'island' destination with strong cultural influence. Eco-tourism niches for 'unspoiled wilderness' of Niassa and interior of Cabo Delgado (luxury eco-tourism, adventure, backpackers, hunting).

6.5.1 Marketing Strategy

In order to promote the development of a comprehensive marketing strategy, the principles and guidelines established in the Tourism Policy have been translated into six marketing objectives, which will form the skeleton of the Marketing Strategy:

Objective One – Target Markets and Strategic Planning – identifying core target markets and devising and implementing strategies to motivate these markets to visit the country, increase spending and extend length of stay.

Objective Two – Product Development and Packaging – establish product strengths, encourage new quality development in these areas, package the product appropriately for target markets and raise awareness.

Objective Three – Branding and Positioning – crystallize Mozambique’s unique selling points; develop a clear personality and brand attributes to be consistently communicated and facilitate a strong brand image in the market place.

Objective Four – Visitor Services and Information Provision – develop and maintain a range of consistently branded brochures and communication pieces designed with clearly identified target markets and objectives.

Objective Five – Promotion and Public Relations – project a positive image of Mozambique by continuously generating promotional material which is inspiring and encourages people to experience the country as a tourism destination.

Objective Six – Partnerships and Co-operative Marketing – develop and implement co-operative marketing campaigns, partnership agreements and foster co-operation of industry.

6.5.2 Strategic Focus for Marketing

- Marketing is considered as a strategic element for tourism growth and the sector is committed to creating effective institutional arrangements aiming to establish a renewed focus on marketing and engage the private sector in marketing (Tourism Policy and Strategy).
- Marketing is effective only in association with parallel product development and infrastructure provision. The three strategic product lines, water based, nature based and people, urban and cultural based tourism experience provide the platform for both product development and national tourism marketing (Tourism Policy and Strategy).
- The sector has defined a set of guidelines related to tourism marketing, which identify the general objectives (increasing the number of arrivals, the length of stay and, ultimately, tourism revenue), emphasize the need to focus, in technical terms, on the target markets and recognize the role of the private sector in the development of actions directed to tourism marketing. It is necessary to establish an effective institutional framework to promote marketing actions (Tourism Policy and Strategy).
- The sector has defined the need to establish a consultative body for the coordination of tourism promotion. It advocates the creation of a multi-sectoral body with membership drawn from the private and public sectors to further strengthen and coordinate initiatives and strategies aimed at strengthening the national tourism product (Tourism Policy and Strategy).

- Strategic product lines for Mozambique are: (1) sun, sand and sea and water sports, (2) eco-tourism and adventure, and (3) culture and urban based tourism.
- Marketing efforts will be concentrated on two types of strategic markets, addressing selected source markets and specifically targeting niche markets (e.g. diving, hunting, eco-tourism, birding, culture, etc.).
- Separate marketing profiles will be built for Mozambique's three regions (South, Centre and North). The marketing profile for the South will emphasize coastal tourism and water sports, the Centre concentrates on eco-tourism and adventure, and the North on exclusive beach tourism and culture.
- The regions are the preferred level for national marketing. While some marketing will be required at the generic or national level, the country is too vast and diversified to justify a national approach only, and more specific actions will have to be developed at regional level and from there be used to strengthen the national level outcomes.
- Strengthening of the marketing capacity at regional level, emphasizing regional integration, will be a priority.
- The identification and marketing of routes is a powerful concept in tourism development. Tourism routes development is a key concept for the delivery of this Strategic Plan. While PATIs are a more administrative and planning concept and won't be marketed at the consumer level, tourism routes and circuits form an important vehicle for national and regional (Southern Africa) marketing.
- Mozambique considers regional integration among southern African countries to be a condition for the successful development of tourism on the African continent. Mozambique will therefore play an active and leading role in regional marketing initiatives.
- The opportunity to implement 'bush-beach' linkages is a strategic advantage for Mozambique in the region. National and regional marketing initiatives will, wherever appropriate, carry and further shape this message.
- Optimising the use of Information Technology in the marketing mix (web-sites, on-line reservation systems, on-line tourism databases etc.).

6.6 Conservation

Natural areas and natural resources are a foundation of tourism in Mozambique. Current tourism demand and supply is focused around the coastal and marine zone – providing a secure base upon which to further develop markets. The real future potential lies in the realization of the vast potential that exists in the interior areas of the country, where wonderful populations of wildlife existed up until a few decades ago. National parks like Gorongosa Game Reserve were well known worldwide due to their abundant wildlife and were the “flag” of their conservation system. Given the right attention, investment and innovative management, the wildlife potential of Mozambique can be re-established to its former glory.

Almost all of the major populations of Africa's 'charismatic mega-fauna' – the exciting and spectacular species of large wild animals such as elephant, lion, buffalo, giraffe, zebra, hippopotamus, etc. – are only to be found in eastern and southern Africa. Viewing these animals, packaged together with associated elements of experiencing exotic cultures such as that of the Masaai, Zulus and other eastern and southern African tribal groups, is a competitive advantage that no other region in the world can offer. It is Africa's unique

selling point, and Mozambique needs to be a key player in this market. To do this it must urgently rehabilitate its wildlife populations to their former status.

Global tourism trends indicate that adventure and wildlife orientated niche markets are some of the fastest growing tourism sectors, given the increasing propensity of northern hemisphere tourists to visit interesting and exotic places. There is an urgency to develop the wildlife sector to meet this demand. To do this, it has to fast track the rehabilitation of its wildlife in appropriate areas in the country, using the private sector as a key driver in this process.

Many of the inland areas of the country have limited agricultural potential, and with industry and mainstream commerce poorly developed in many provinces, the prospects of facilitating economic growth and development in these areas is limited. Nature-based tourism however does provide an option that can be realized given enough attention and resources.

6.6.1 Conservation Strategies to support the Development of Tourism in Mozambique

The following specific conservation related strategies will be used to support the development of tourism in Mozambique over the next ten years:

6.6.1.1 Consolidation of Key Natural Resources Management

The present stage of development of tourism and urban settlements along the coastal areas is alarming and needs a thorough planning and management. The marine protected areas and the coast are especially sensitive areas as they host fragile ecological collections and important biodiversity, and have to be adequately managed to avoid any adverse effects. Over 80% of the land area of the country is covered by natural savannah type forest.

Thus, the management over all wild natural resources, including coastal and inshore marine resources, will be incrementally improved and consolidated into one natural resources management framework in the country, which will provide for a structured approach in policy definition, regulation, management and coordination of all activities relating to conservation.

6.6.1.2 Improving Conservation Related Products and Services Quality

One obvious shortcoming in the present state of affairs is the absence of Regulations to operationalise the various Laws and Decrees supporting conservation areas activities in the country. Specific Regulations are required for each segment activity area, namely:

- Regulations and Guidelines related to tourism development and uses in coastal and marine protected areas, and Regulations and Guidelines related to tourist hunting activities;
- Regulations and Guidelines pertaining to Community Based Natural Resources Management (CBNRM);
- Regulations and Guidelines pertaining to the management and trade in live animals;
- Regulations and Guidelines pertaining to concessions and investments opportunities in the special conservation areas, i.e., National Parks and National Reserves.

6.6.1.3 *Fast-tracking the Rehabilitation of Wildlife into Conservation Areas*

Given the low base of wildlife populations in the country's conservation areas and on communal lands, it is necessary to accelerate the rehabilitation of game into appropriate areas.

A specific campaign will be launched to attract the private sector, donors and other partners to participate in rebuilding game populations in communal areas through activities such as game-ranching and conservancies in areas that are appropriate for wildlife management, by offering special investment incentives. Such incentives will be researched and tested in pilot projects in the GLTFCA based upon models that ensure that communities obtain equitable benefits that enhance their livelihoods, and that the country is not prejudiced unduly by the project implementation or such incentives. Successful models will be implemented in other provinces of the country. This strategic action will be seen as a priority.

The most ideal location for a pilot project is the Gorongosa National Park. Being located in a central position, Gorongosa has several advantages to support the choice, including: its large size with diverse natural habitats; its rich water resources; good external service roads; reasonable internal road networks; a good nuclei of wildlife to boost productions; prime sites for the development of tourist lodges and camps; adjacent natural corridors to facilitate population movement and growth; its proximity to Beira.

6.6.1.4 *Using TFCAs to Support the Development of Tourism*

In the context of PATIs, the primary goal of conservation areas is to provide high quality recreation opportunities to support the growth of tourism. Given the high profile that the GLTFCA has achieved in the past few years, there is a need to continue the efforts of strengthening the TFCAs already established (Lebombo e Chimanimani). Additional TFCAs will be planned and developed wherever appropriate and possible. The Niassa Reserve, the National Park of Quirimbas, the Niassa Lake and the ZIMOZA TFCA will have a special attention.

6.6.1.5 *Supporting the Establishment of New Conservation Areas*

Given the low human densities in some areas, the promulgation of new conservation areas is an important option to enhance development opportunities and preservation of resources. Obvious possibilities include the designation of World Cultural Heritage Sites (like Ilha de Moçambique) as a Conservation Areas. There are also exceptional opportunities to establish IUCN's Category VI conservation areas, arising from CBNRM initiatives.

6.6.1.6 *Strengthening and Expanding the Professional Hunting Industry*

Tourist hunting operations have the potential of being a good source of revenue, especially in CBNRM areas. However, the professional hunting industry in Mozambique is not well developed, if compared to Tanzania, Zimbabwe and South Africa.

MITUR, through its conservation agency and its tourism functions, will actively facilitate the up-grading of facilities and operations in the country, by:

- carrying out annual censuses of wildlife populations in key areas;
- working with hunting operators to promote and market the industry;

- upgrading the hunting industry to the world hunting stage;
- adopting the platform of articulation to be developed between the private and public sectors;
- regulations and monitoring of hunting activities;
- land use planning to identify new tourist hunting areas.

6.6.1.7 Promoting CBNRM Processes in the Country

Community Conservation Areas are a key component for developing the tourism base in the country, especially those linked to TFCAs. CBNRM processes have proven effective in facilitating a greater willingness of communities to assume custodianship of natural resources, particularly in southern African countries. This is a key opportunity to harness this potential in Mozambique, and through this to accelerate the rehabilitation of wildlife in appropriate areas. It is also an opportunity to ensure that ecosystem management and sustainable use practices are extended across the country.

Specific actions will be carried out to encourage communities to develop the capacity to adopt CBNRM approaches and practices in line with the potential of the natural resources in their area. This will be implemented and coordinated through the provincial structures.

There is a need to facilitate and promote the development of joint venture agreements between communities and the private sector, whilst at the same time ensuring that, wherever possible, communities rights are protected and that they obtain equitable and fair benefits in such ventures. The partners, together with provincial structures, will also be encouraged to facilitate the access of communities to markets so that they receive equitable returns on investment for their products and services.

6.6.1.8 Taking Advantage of International Conventions

Mozambique is a signatory to a number of International Conventions relating to conservation (See Section 6.1.3). This status provides opportunities to obtain donor funding to facilitate the implementation of conservation activities, especially those relating to biodiversity management and CBNRM.

Participating in the implementation functions of international conventions is in and of itself a learning and capacity building exercise, whilst at the same time taking opportunity to influence the direction that such bodies take into the future. Therefore, it will be necessary to encourage national partners (ie., from national academic institutions) to actively participate in IUCN's Commission on National Parks and Protected Areas (CNPPA), IUCN's Commission on Ecosystems Management, IUCN's Southern African Sustainable Use Specialist Group, IUCN's Commission on the CBD and in CITES.

6.6.1.9 Summary of Strategic Focus for Conservation

- Modern business management approaches are adopted in the organisations that are responsible for conservation areas management.

- Tourism related conservation product and service quality is improved and developed to support tourism objectives.
- The rehabilitation of wildlife into selected parks and conservation areas is accelerated through partnerships with stakeholder.
- Consolidation and expansion of Conservation Areas and TFCAs for tourism development and strengthening of co-operation with neighbouring countries.
- The professional hunting industry is strengthened through improved operations, marketing, regulations, control and competitive pricing of trophies.
- CBNRM initiatives across the country are encouraged and supported as a means of enabling communities and SMMEs to participate more actively and effectively in tourism processes, including partnerships and joint ventures with the private sector.

6.7 Action Plans

The Implementation Framework gives strategic direction to the following activities, considered crucial for the implementation of the SPDTM:

- Organizational and Financial Planning
- Physical Planning
- Conservation
- Investment Promotion
- Safety and Security
- Regional Integration
- Marketing and Public Relations
- Developing a Tourism Culture
- Tourism Satellite Accounts and Statistics
- Human Resources Development
- Community and SMME Participation
- Regulation and Control

The action plans detail the activities within each focus area at national, regional and provincial level for the next five years.

6.7.1.1 Organizational and Financial Planning

Strategy: Improve the institutional effectiveness of MITUR

- Institutional Planning
- Development of annual work plans and budgets
- Sourcing Financing
- Creation of Tourism Facilitation Committees at provincial level
- Implementation and Coordination of PATIs

6.7.1.2 Physical Planning

Strategy: Enhance investment in tourism products and services by providing more efficient and effective planning support to the private sector, and facilitating the provision of greater levels of infrastructure.

- Integrated Development Planning
- Developing Guidelines and Patterns for designing, architecture and building in tourism sector
- Tourism Routes Development
- Air Transport Liberalization
- Construction of Infrastructure
- Road, Rail and Sea Transport Network and Infrastructure.

6.7.1.3 Conservation

Strategy: Work with the private sector, donors and partners to rehabilitate conservation processes and conservation areas in Mozambique.

- Fast-track rehabilitation of wildlife
- Infrastructure construction and rehabilitation
- Management of Conservation Areas
- Management of Marine Resources
- Creation of New Conservation Areas
- Concessions

6.7.1.4 Investment Promotion

Strategy: Consolidate investment procedures and processes for tourism, and provide attractive opportunities to viable partners.

- Promote National Investment
- Promote Investment in Priority Areas
- Establishment of Anchor Projects

6.7.1.5 Safety and Security

Strategy: Collaborate with the police, civil organisations and communities to provide a safer environment for tourists and investors.

- Engage with the police and relevant provincial authorities and community organisations
- National safety campaign
- National awareness campaign.

6.7.1.6 Regional Integration

Strategy: Form strategic alliances with neighbouring countries and relevant organisations, developing synergies and integrating plans and actions.

- Regional Strategies and Plans
- Promote Alliances and Partnerships with Neighbouring Governments and Key Sectors.

6.7.1.7 Marketing and Public Relations

Strategy: Working from clearly articulated marketing plans and strategies and optimise the use of communication and information technologies to reach the identified target markets and improve the image of Mozambique as tourism destination.

- Marketing Strategy
- Strategic Niche Markets
- Strategic Source Markets
- Domestic Market
- Tourism Information Centres
- Events and Industry Fairs
- Electronic Communication and Information Technology
- Marketing of Mozambique's Regions
- Public Relations and Media
- Acquisition of Appropriate Office Accommodation.

6.7.1.8 Developing a Tourism Culture

Strategy: Use the media to promote outreach awareness campaigns to all key tourism related stakeholders and the general public, outlining the economic and social benefits derived from supporting and enhancing tourism processes.

- Identify Benefits of Tourism Through Tourism Satellite Accounts
- Tourism Awareness Campaigns
- Create an Institute for Promotion of Tourism Culture.

6.7.1.9 Tourism Satellite Accounts and Statistics

Strategy: Develop an in-depth and comprehensive base of national data to manage the Tourism Satellite Account as a means of identifying and advancing the economic impact of tourism on the country's economy.

- Preliminary needs analysis
- Establishment of intersectoral coordination and systems as determined by the Tourism Satellite Account
- Develop data collection capacity in tourism and related sectors

- Collect and analyse and produce 'TSA' data.

6.7.1.10 Human Resource Management and Development

Strategy: Increase the ability of MITUR and the tourism industry and related sectors to provide optimal tourism products and services through skilled and capable staff.

- Institutional Strengthening of MITUR
- Training and Education.

6.7.1.11 Community and SMME Participation

Strategy: Enable communities to participate actively in and benefit more from tourism processes by providing the right enabling environment for them to develop enterprises and businesses.

- Community Tourism Programs
- Micro Lending Programmes
- Capacity Building.

6.7.1.12 Regulation and Control

Strategy: Optimise the economic and social returns from tourism, in the short and long term, by developing and implementing more effective regulatory and management systems and mechanisms.

- Legislation and Regulations
- Integrated Planning
- Fiscalization Capacity
- Processes for Tendering and Concessions

