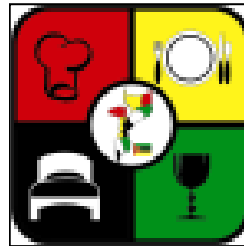




AHSM

Associação dos Hotéis do Sul de Moçambique



STRATEGIC PLAN

2007 – 2012

Supported by:





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1 INTRODUCTION

1.1 Background and Justification

“Business Membership Organizations (BMOs) can be a tool for small and medium enterprise (SME) promotion in developing countries. BMOs can also be effective providers or facilitators of selected enterprise support services that can work concurrently at the policy level.”

“Support for small and medium enterprises (SMEs) has to be regarded as an integrative part of every strategy for private sector promotion in developing countries because of their contribution to poverty alleviation and equitable growth. In order to grow and prosper, all private enterprises, but especially SMEs, need a suitable legal and regulatory environment, a reliable infrastructure as well as different financial and business services. The most important actors, which can influence the SMEs’ environment, are on the one hand government and public institutions, and on the other hand private service providers, with business membership organizations (BMOs) in between.”

“BMOs in developing countries are typically characterized by poor organizational capacity and technical skills, lack of proper accounting systems and governance, and lack of demand-driven orientation resulting in low levels of sustainability”.

“Lobbying and advocacy for a more conducive economic environment are another core activity of BMOs. By actively engaging in advocacy, a BMO raises its profile among policymakers and enhances its reputation within the business community. But most BMOs are not very successful in interest representation and advocacy, because of the interference and mistrust of government bodies, the political ambitions or closed shop mentality of the BMOs’ leaders, missing know-how and contacts, the fragmentation of private sector interests, and a prevalent informal and ad-hoc style of lobbying.”

As in many other developing countries, Mozambique has an incipient private sector. Although a number of BMO’s exist they are generally lacking the strength and autonomy to perform their roles in the development of a sound private sector.

Consistent support has been given by donors to CTA, the confederation that aggregates most MBO’s. However, individual BMO’s have lacked that support and are generally not active and effective. The IFC through its program PEP Africa identified a number of BMOs that may benefit from external technical support and contracted the provision of technical support. The technical assistance is intended to improve these associations’ capabilities and effectiveness.

AHSM - Associação dos Hotéis do Sul de Moçambique (Association of the Hotels of Southern Mozambique) is a Mozambican BMO in the Tourism sector. It aggregates a relevant portion of a growing industry, one with recognized potential to become a key sector in the economy. There is an important role for AHSM to play as long as it reaches a stage of development that allows it to become a recognized and effective representative of Industry’s interests.

Over the following pages we will analyze AHSM in detail, its opportunities and constraints and propose a plan to develop the association.



1.2 Business Plan Objectives

Description of goals and approach

The overall goal is to design a strategy and a consistent Business / Feasibility Plan to enhance AHSM effectiveness in reaching its goals and facilitating the fundraising to sustain its operations.

Following the analysis of the current position of AHSM and its operating environment we propose for AHSM a new formulation of:

- Vision, Mission, Objectives and Strategy
- Internal Organization and HR Capabilities
- Sustainability and Growth
- Communication and Market Presence

In order to design a consistent coherent strategy for AHSM the following aspects were taken into account:

- Market, industry and operating environment research
- Analysis company's current strategic position and identify optimal strategies for the future
- Revision, analysis and optimization of income generation, expenditure and investment
- Assess and analyze cost implications of plans over the next 5 years.

Departing from the mission statement and prospective goals defined by AHSM, the long term strategy encompasses a number of relevant issues:

- Advocacy
- Training
- Marketing & Expansion
- Efficiency and effectiveness
- Identification of major challenges and proposition of a clear path for the association (set of actions conducive to achievement of AHSM goals)
- Definition of mechanisms to overcome current constraints



2 THE ASSOCIAÇÃO DOS HOTÉIS DO SUL DE MOÇAMBIQUE

2.1 Association Overview

The Associação dos Hotéis do Sul de Moçambique (Association of the Hotels of Southern Mozambique) or AHSM, is a non-profit BMO that congregates a significant number of hotels in the Southern provinces of Mozambique. The large majority of its members are based in and around the city of Maputo with a few also operating units in other regions of the country, namely the Northern province of Cabo Delgado, Sofala and Inhambane.

AHSM was legally formed in March 2002 with its governing body first elected in April that year. It was created with the purpose of representing the hotel industry interests and its members through the

- Promotion of country's image as a tourism destination, in particular the southern part of Mozambique (the provinces of Maputo, Gaza and Inhambane);
- Promotion of a constant dialogue with the government, national and international organizations as well as other institutions in the same line of business;
- To lobby critical issues of interest to members;
- Creation of a climate conducive to continuous improvement of the business environment in the Hotel and Tourism sector in Mozambique.

A plan of activities is budgeted and approved on the general member assembly on yearly basis. Revenues of AHSM are drawn from membership fees, totaling 50.000 USD/year.

AHSM is at a cross road: general perception of members is that the initial momentum has been gradually lost and the organization is facing a phase of stagnation. However, the tourism sector is growing fast and going through major challenges that claim for a strong association with the ability to defend members' interests.

The present document discusses the current status quo of AHSM in the context of the Mozambique tourism industry and suggests a way forward for AHSM. Most of what is presented results from contributions of those few members that most actively participated in the process of evaluating the challenges and the options ahead for AHSM.

2.2 Current Members

At present AHSM has 24 members, that correspond to 32 hotel units (Africa: 3 hotels; Avenida 2 units, including Hotel Tivoli in Beira; Humula: 2 units, including an hotel in Namaacha; Indigo Bay: 5 units of Rani Resorts, mostly in the Northern province of Cabo Delgado).

The largest hotels and hotel chains in the country are members of AHSM. However there is not a clear cut distinction: some hotel chains have individual hotels as registered members while others have the umbrella company as the AHSM registered member.



AHSM is particularly well represented in Maputo city where most hotels are members. Only a few hotels are not members, notably VIP, hotel Mozambique and Hotel 2001.

In the Maputo province and outside the city a number of hotels have not yet joined the association. In the coast south of Maputo Ponta Malongane, Ponta Mamoli and a few other units in Ponta do Ouro are not members. North of Maputo hotels in Xai-Xai, Zonguene and in a number of locations along the coast are not associated members of AHSM.

Table 1 - Members Of AHSM

Members of AHSM				
HOTEL	Contact Person	TEL.	FAX	E-MAIL
Africa	Mussa Laher Sadique	21 312437	21312441	hotel.africa@tvcabo.co.mz
Andalucia				
Avenida	Jorge E. Simões	21484400	823015150	manager.assist@hotelavenida.co.mz
Bazaruto	Arturo Esposito	21305000	21305305	arturo.esposito@pestana.com
Catembe	Koenraad Collier	21380051	21380003	office@catembe.net catembe@panintra.com
Cardoso	John Elliot	21491071	21491804	gm@hotelcardoso.co.mz info@hotelcardoso.co.mz
Girassol	Fernando Teixeira	21494816	21360330	girassolbahiahotel@visabeiramos.co.mz fernandoteixeira@visabeiramos.co.mz
Holiday Inn	Bruce Chapman	21495050	21497700	brucec@himaputo.co.mz; himaputo@southernsun.com carlas@himaputo.co.mz
Hoyo Hoyo	Carlos Pacheco Faria	21490701	21490724	promotur@tvcabo.co.mz
Humula	Quessanias Matsombe	21314576	21314576	humula@tvcabo.co.mz
Ibis	Fernando Rodrigues	21352200	21352220	h4975@tvcabo.co.mz gm@accor-hotels.com
Indy	Margarida Pinheiro	21498765	21499643	indyvillage@visabeiramos.co.mz; margaridapinheiro@visabeiramos.co.mz
Inhaca	Arturo Esposito	21305000	21305305	arturo.esposito@pestana.com
Indigo Bay	João Salomão	21301618	21301625	patricia@rani.co.mz; jsalomao@rani.co.mz
Marracuene Lodge	João das Neves	21303082	21302054	jneves@adviser.co.mz, marracuene@adviser.co.mz
Monte Carlo	Iliasse fakir	21491333	21308959	res@montecarlo-hotel.com, iliassefakir@gmail.com
Mozaica				
Motel do Mar	Maria Teresa Moreira	21496707	823002140	petro.tmoreira@zebra.uem.mz
Polana	Richard Lander	21491001	21491480	rlander@pserena.co.mz
Rovuma	Arturo Esposito	21305000	21305305	arturo.esposito@pestana.com
Santa Cruz	Leonardo Nhimbo	21303004	21303066	hsantacruz@teledata.mz
Tamariz	Ana Fazenda	21428608	21428609	tamarizhotel@teledata.mz
Terminus	Iliasse fakir	21491333	21491284	termhot@terminus.hotel.com, iliassefakir@gmail.com
Tivoli	José Luís Gomes de Sousa	21307600	21307609	tivoli@tvcabo.co.mz

Source: AHSM



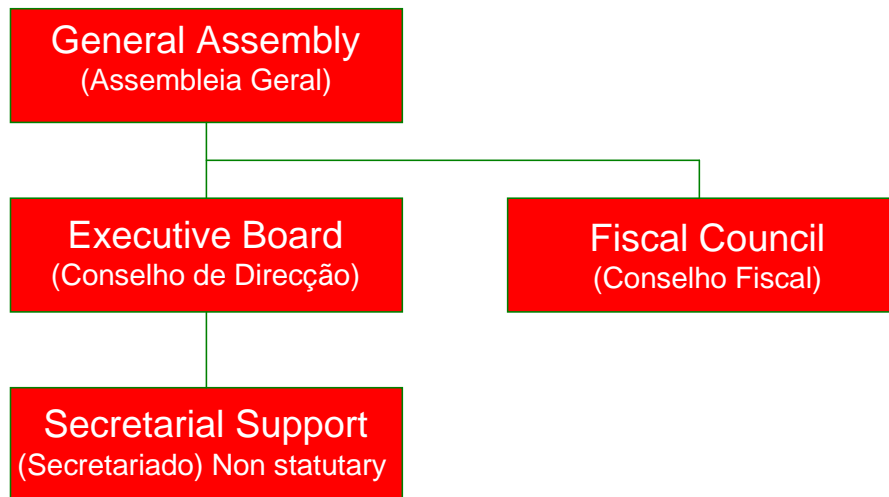
2.3 Governing Bodies and Organizational Structure

According to its statutes AHSM general assembly elects a governing board selected from its members and mandates for which the duration is not defined. The executive board has secretarial support and a permanent office located at the Rovuma business centre in Maputo. Together with the executive board, the fiscal council is also elected by the general assembly for mandates over the 3-year periods.

The following graphic depicts the current organizational structure of AHSM:

FIGURE 1

AHSM Organizational Structure



Source: AHSM

Currently the association is quite lean and its structure very simple. Its permanent staff is limited to a secretary that assists the Executive Board which members exert their functions on a voluntary non-paid base. The following table resumes the current composition of the Executive Board:

Table 2 - AHSM Executive Board

AHSM EXECUTIVE BOARD			
Position	Name	Celphone	Email
President	Quessanias Matsombe	823018020	gmatsombe@ahsm-mz.org
Vice President	Richard Lander	21491001	rlanderr@ahsm-mz.org
1 Vogal	Koenraad Collier	21380003	kcollier@ahsm-mz.org
Secretary	Jose Gomes de Sousa	21492000	jsousa@ahsm-mz.org
Treasurer	Christian von Besser	21491333	cbesser@ahsm-mz.org

Source: AHSM



3 OPERATING ENVIRONMENT

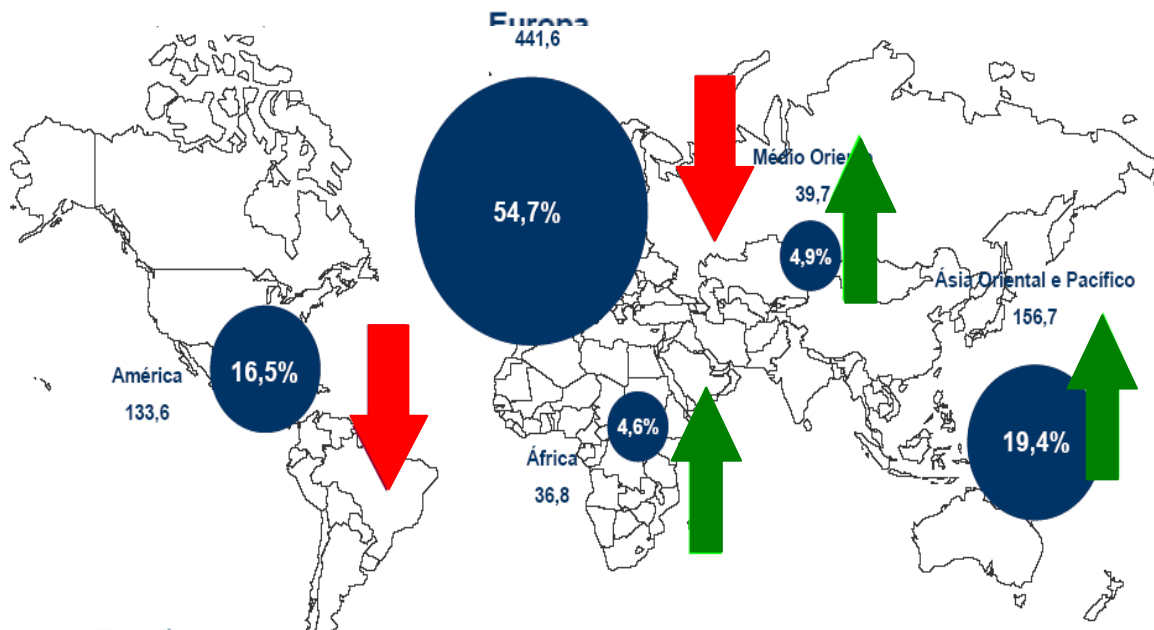
3.1 Industry Trends

The Tourism sector is responsible for over 10.5% of global GDP and over 25% world trade in services. Over the past 50 years the industry has grown at a yearly average rate of 7% and is still growing at a faster pace than the economy as whole, becoming one world largest industries in absolute and relative terms with an aggregate yearly turnover in excess of \$600 billion. Being largely a labor intensive industry it employs over 200 million people and accounts for over 10% of total employee wages and salaries, in addition to being the world's largest tax payer. Tourism also induces the investment in infrastructures, such as roads, airports, hospitals, and stimulates complementary sectors of the economy (construction, transport, culture, various services,...). The environmental protection and the preservation of cultural sites and traditions are also important benefits of Tourism, which further benefit the local populations.

The following graphic shows the relative importance of tourism worldwide by regions in number of arrivals.

GRAPHIC 1

Relative Importance of Tourism in the World (number of arrivals; 2003)



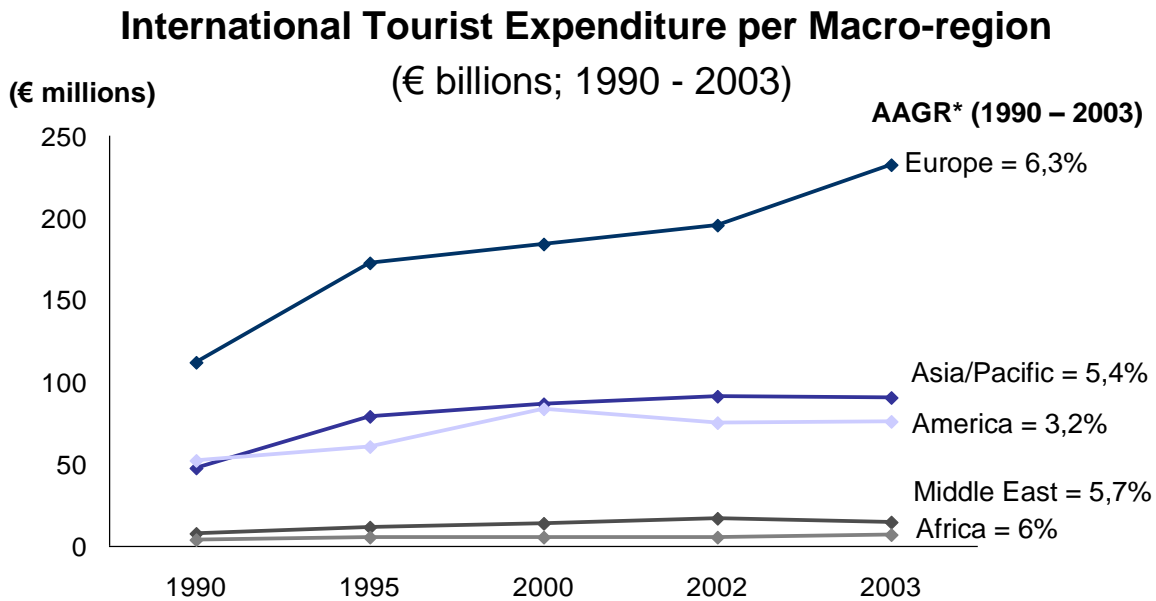
Source: Neoturis / WTO

More traditional destinations, such as Europe and the Americas, although still by far the largest in volumes are gradually losing market share to new destinations such South East Asia and Africa, which have been recently showing higher growth rates.



Also in terms of revenue generation, the macro regions show significant differences in volume as well in trends. Despite its low weight in the industry, Africa is actually growing at faster pace than other more traditional regions.

GRAPHIC 2



Source: Neoturis / WTO

It is foreseen that international arrivals to the African continent will reach 77 million by 2020. This value corresponds to a yearly growth rate of 5.5% for the 1995-2020 period, well above the world average of 4.1%.

In recent years stronger growth has been observed in the Northern Africa region, particularly Morocco and Tunisia (at 16 and 17% growth rates in 2004), benefiting from the proximity to the European market and favorable policies such as the liberalization of the air space (ex: Morocco) that have allowed the operations of low cost companies. However and despite this growth, Africa's share of the tourism market is still very low and well below its potential.

Sub-Saharan Africa has also experienced remarkable growth in tourism in the past two decades, with its market share of international arrivals increasing from 1.5% in 1970 to 4.5% in 2003. That trend is projected to continue in 2005-2020, increasing Africa's share to 5% of total international arrivals by 2020. South Africa is by far the largest regional market accounting for 40% of total arrivals in the continent. It is important to note that all the neighboring countries to Mozambique (and Mauritius, excluding Malawi) are within the top ten destinations in Africa.

In accordance to research conducted by the WTO (World Tourism Organization), the African National Tourism Authorities have been intensifying their promotional efforts adopting more aggressive strategies. 75% of the NTAs concentrate their action in the European and American markets as well as in the inter-regional markets. The vast majority

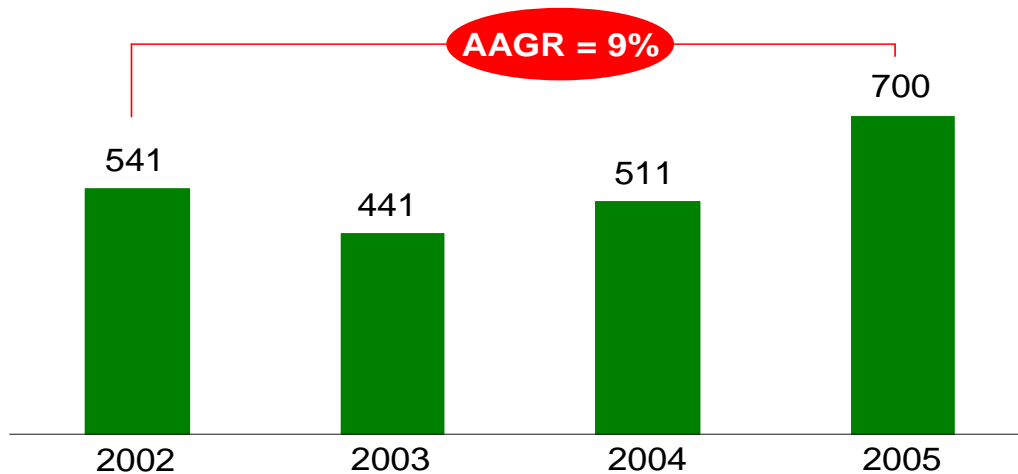


of the African countries have developed national tourism strategies and regard the sector as a priority for the development of their economies.

Given its natural conditions and its proximity to South Africa, Mozambique is well positioned to benefit from these general trends. Since the peace accord in 1992, international arrivals of tourists to Mozambique have grown rapidly from 240,000 in 1999 to some 700,000 by 2005, an annual growth rate of about 19% (despite a decrease observed in 2003).

GRAPHIC 3

**Evolution of the Tourism Sector in Mozambique
(number of arrivals)**

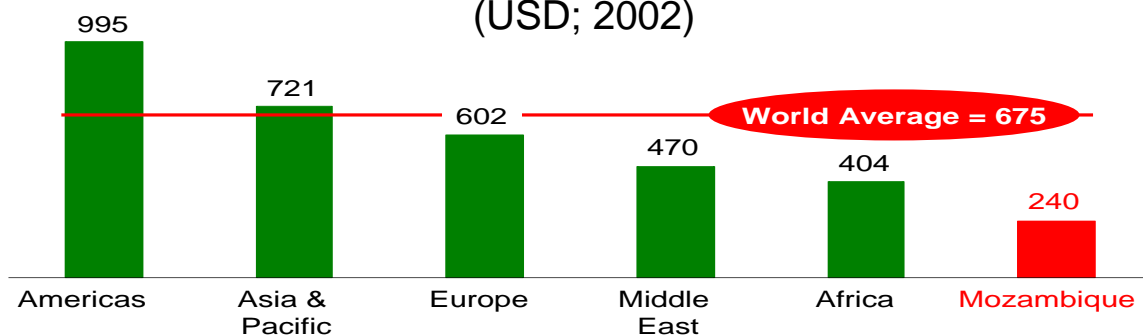


Source: Source: Neoturis / WTO

According to data recently disclosed by the WTO, in 2005 the tourism in Mozambique grew by 37%, the World's largest growth rate. Although quite positive this still translates to relatively low volumes in absolute terms and far from the real potential. In addition, the average stay and revenue per tourist is still quite low when compared to regional markets. 2 tourists per 100 inhabitants observed in Mozambique are half the average for Africa and far less than the World average of 11.

GRAPHIC 4

**Average Tourism Receipts Per Tourist Arrival
(USD; 2002)**



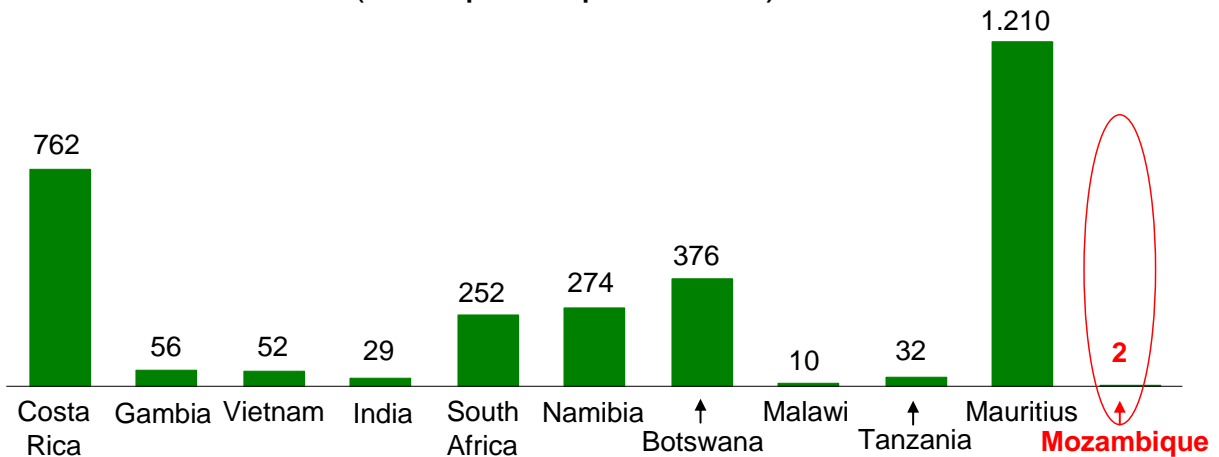
Source: World Bank / WTO



Tourism also accounts for a fairly low percentage of Mozambican GDP (around 2.5%). In addition the average receipt from tourists is significantly below those of other regions, further explaining the small weight of tourism in the Mozambican economy.

GRAPHIC 5

Contribution of Travel and Tourism to GDP (USD per capita; 2001)



Source: World Bank / WTO

The opportunities identified in terms of tourism for Mozambique focus on the coastal areas and archipelagos (Quirimba and Bazaruto) and the national parks / reserves (Limpopo, Gorongosa, Niassa, Elephant, Banhine, Zinave). In turn Maputo is likely to play an important role in the industry as the gateway for tourism in the country, given its international and internal links and proximity to its main market of origin, South Africa. It is also the central point of economic activity in the country. Nearby areas like Ponta do Ouro, the Limpopo trans-frontier park, Inhambane and Vilankulos areas concentrate the bulk of tourism activity and present great potential for growth.

It is interesting to note that from total international arrivals, Mozambique shows a disproportionate percentage of business related travellers when compared to the other African countries (42% vs 15%). This explains to some extent the higher concentration of hotel units in the capital (also the business centre) compared to the rest of the country. This is likely to change as a true tourism industry develops, shifting the demand and offer to other areas.

Overall, Mozambique is favored by a number of characteristics:

- Long stretches of untouched coast
- Optimal conditions for dive and other aquatic activities
- Rich biodiversity
- Rich cultural and historical heritage
- Proximity to South Africa and other Tourism destinations



The worldwide trends in the industry, valuing concepts associated with the contact with nature and preservation, such as the *bush & beach*, are well suited to the natural conditions of Mozambique.

The natural conditions of Mozambique combined with the trends in the sector indicate good prospects for the development of a strong national industry and sustained high growth rates in the coming years.

3.2 Specific Factors

3.2.1 Constraints (industry)

In a recent study the World Bank states that:

“ . . . the principle constraints for tourism development in Mozambique are coordination among agencies involved in regulating tourism, unavailability of sufficient land with serviced infrastructure and consequent difficult communications; a lack of understanding of tourism’s potential outside tourism circles; the need for strategic thinking in the implementation of tourism policies, regulation and programs; and the need to improve quality by education and training”.¹

In its assessment of the industry Technoserve has divided the major constraints to the development of the tourism industry in four main categories: Marketing, Infrastructure, Regulatory and Skills. Building on Technoserve’s assessment and from our own analysis we have identified the following main constraints:

¹ Christie, I. T. (2004) Overview of Tourism in Mozambique, MIGA Swiss Program, World Bank, AFTPS, August 25, 2004

**Table 3 - Constrains To Tourism Development**

Marketing Gaps
Weak marketing or booking systems
Difficulty in overcoming negative image of the country (e.g. malaria, bureaucracy)
Lack of a coherent and structured promotional effort

Infrastructure Gaps
Limited access to and high costs of finance (both to the private and public sectors)
Inadequate or poorly maintained infrastructure (roads, airports, electricity, water, communications, waste management, health units)
Under-developed network of service providers (reliable transportation, promotion, sightseeing, museums, cultural/entertainment events, etc)
Long lead time to build up network of service providers
high costs (logistics, taxation, pilferage, training,...)
The poor alternative activities available for tourists and the inexistence of tours/packages

Regulatory Gaps
The liberalization of air space and its opening to a wider number of companies (currently air fares to Mozambique are extremely high);
Absence of clear laws and still some arbitrary application of existing laws and rulings
Heavy bureaucracy and administrative procedures as well as red tape
Difficulty exchanging land
High cost and risk of importing
Poor contract enforcement, limited recourse
High licensing and transaction costs
High incidence of corruption, fines and theft
Low labor market flexibility
Limited public sector capacity to respond to private sector needs
Ill-defined community rights/ participation in eco-tourism operations
Weak environmental protection legislation and implementation
Restriction on export of foreign exchange

Skills Gaps
lack of qualified staff
Limited knowledge, skills in nature-based activities and hospitality
Limited knowledge of target client segments and international markets
Lack of training/ education in eco-tourism / conservation as well as in hotel operations
Few "home-grown" eco-tourism entrepreneurs

Source: Technoserve, Consultant Analysis

We analyze some of these factors in more detail in the following chapter.

The list is long and it will take time, effort and resources to tackle all. As a privileged representative of the industry, AHSM can clearly play a part in overcoming these obstacles. A strong association capable of lobbying with the relevant Governmental bodies and of pulling the resources to influence policies, from regulatory to taxation, educational or promotional, would go a long way in tackling most constraints and speeding up the development of a thriving industry.



3.2.2 Specificities Of Maputo Within The Country's Tourism Industry

Maputo specific circumstances set it apart the rest of the country in terms of tourism. Maputo receives around 200,000 visitors (in 2004) and is by far the premier destination in Mozambique. Nearly 40% of all international travelers come to Maputo. The large majority of these (80%) fall into the business traveling segment, corresponding to nearly 70% of the segment for the country.

There are a number of underutilized facilities in Maputo, such as the Joaquim Chissano conference centre and other smaller conference facilities. Given the already large weight of the business travelers, Maputo could easily develop Meetings, Incentives, Conferences and Exhibitions (MICE) tourism products. MICE visitors can spend twice as much as ordinary visitors. Many of them also want to maximize their enjoyment on a short and often demanding business trip and may therefore extend their stay for one or two nights immediately after a conference, for instance. Conference tourism also provides the necessary environment for promoting Maputo as a destination for other forms of tourism like incentive tourism.

In 2004 Maputo accounted for 1/4 of country's bed capacity and over 1/3 of high end quality beds. Occupancy rate was higher while the average stay per tourist was also longer. The hotel profile is also distinct in Maputo: 21 out of the 24 hotels with over 50 rooms in Mozambique are located in Maputo (and all hotels with over 100 rooms).

Maputo hotels declared a significantly disproportionate share of revenues to the remainder of the country: 77% of hotel industry revenues are declared in Maputo, which in turn makes this region the higher tax payer. This may indicate that the hotels in the city are disproportionately over-burden with taxes. Tax evasion (ex: from invoicing abroad) is less likely to occur in Maputo. The following table compares a number of relevant indicators for Maputo and the country as a whole.

Table 4 - Tourism Indicators For Maputo City (2004)

INDICATORS	MAPUTO	MOZAMBIQUE
International Tourists	175,000	441,000
By air	55,000	68,000
By road	120,000	373,000
Share business	140,000	200,000
Share leisure	20,000	80,000
Share VFR / Other	15,000	160,000
Hotel beds	3,500	13,807
Luxury quality beds	2,832	7,616
Number of hotels > 100 rooms	7	7
Number of hotels < 50 rooms	50	296
Arrivals	55,383	1,166,019
Room-nights	335,744	664,375
Average occupancy rate	30.70%	28.90%
Hotel receipts (USD)	27,330,091	37,577,916
Employees in hotels	3-4,000	10-11,000
Population	1,190,000	19,406,703

Source: World Bank



The differences between the Maputo area and the country's industry suggest that the hotels in the Maputo region face different challenges which in turn may require specific approaches.

These specificities are relevant to the definition of the role, scope of activities and geographic outreach of an association such as AHSM.

3.2.3 The Role Of The Mozambican Government

The GOM has defined the objectives for the sector in March, 2003 with the outlining of the national tourism strategy, which can be broadly defined as:

- 1) Develop and position Mozambique as a World class tourist destination;
- 2) Contribute to the alleviation of poverty, economic development and job creation;
- 3) Develop a responsible and sustainable tourism;
- 4) Contribute to the conservation and protection of natural resources;
- 5) Preserve cultural values and national identity;
- 6) Improve the quality of life for the Mozambican people.

Great attention is given in the strategic plan defined by the GOM to aspects related with the conservation, reduction of poverty and social development. It is important that the industry and the Government work along the same lines and that these aspects are taken seriously by the private sector. The GOM clearly agrees with the private sector general perception of the potential of the tourism sector and with constraints the sector is faced with. This offers a reasonable basis for cooperation and for a common effort. Private sector associations such as the AHSM are a privileged platform for collaboration between the industry and the government that can play an important role in the harmonious development of the sector.

In its strategic plan it is clearly defined the following vision for the sector:

“By the year of 2025, Mozambique shall be the most vibrant, dynamic and exotic destination of the African continent, recognized for its beaches, coastal tropical attractions, excellent eco-tourism products and intriguing culture, welcoming over 4 million tourists every year. The conservation areas constitute an integral part of tourism and its benefits will significantly contribute to GDP, generating wealth and prosperity to the local communities in the country”.

This positive vision and the recognition of the important role defined by the GOM for the sector in the country development must be well come and jointly explored by the tourism industry.

The Government in the person of the Tourism Minister has clearly shown openness to having private sector partners to help devising and establishing the adequate strategy and policies. To some extent, the arbitrary rulings (or the lack of clear rules) the industry is often faced with result from the inexistence of strong associations able to defend the industry interests and set the agenda for the sector.



In summary, Mozambique shows a great potential for the development of an important tourism industry. This in turn is a great opportunity to diminish the endemic poverty the country is faced with, given the strong impact on employment creation and health generation for large numbers of people, particularly in remote areas, as well as being potentially an important source of revenues for the state (in the form of taxes). This is already being reflected by a sharp increase of tourism activity. Both private investors and the government are gaining interest and awareness of the untapped potential and are positioning themselves to better take advantage of it. The current low weight of tourism in GDP (2.5%) in Mozambique, compared to 8% in South Africa or 10% worldwide gives an idea of this potential.

3.3 PESTLE Analysis

An adapted PESTLE analysis was carried out to examine the relevant external factors that affect the macro-environment in which AHSM will operate.

3.3.1 Political Factors

The political factors include the government regulations as well as the formal and informal rules within which hotels must operate. The following table shows the political tendencies that affect the tourism industry.

Table 5- Pestleanalysis

PESTLE ANALYSIS - POLITICAL FACTORS					
External Factors	Description	Impact		Impact Period	Importance
		Positive	Negative		
POLITICAL	Corruption		Increases costs, hinders confidence, undermines investment	Long term	High
	Legal framework (uncertain)		The lack of clear regulations favor arbitrary decisions		
	Rule of Law (lack of) and abusive interpretation		Increases costs, hinders confidence, undermines investment	Long term	High
	Taxation	Competitive tax system increases industry attractiveness and attracts investment	Arbitrary taxes diminish attractiveness of industry, create mistrust & uncertainty	Medium term	High
	Political stability and democratic Government	Diminishes perceived risk and fosters economic growth		Long term	High
	Government Supports Investment	Attracts new investment		Medium term	High

Source: Consultant Analysis

Corruption is still pointed out as a serious problem in Mozambique: from licensing a new hotel to securing the land rights for new investments; harassment of tourists; or straight requests for bribery from government officials are examples pointed out as still common and with a serious impact on business operations. Not only it impacts the bottom line of the business, it creates obstacles on developing the activities, attracting clients, expanding or



considering further investments. The word of mouth further fueling this perception deters new projects/investments in the country.

Some laws, such as the labor, the land laws or the regulation of the air space, are highly controversial and generally perceived by investors and independent institutions are detrimental to economic growth.

Also the lack of effectiveness of justice creates a sense of impunity and helpless when private companies or even individuals are faced with abusive fines or other sort of conflicts. Often hotel operators are faced with arbitrary unilateral rulings that undermine the premises which led to the investment decision, compromising the profitability of the business.

The implementation of a number of taxes and abusive pricing adjustments for public services also diminish the profitability of the hotel operations. Given the urgency the Government has to increase its revenues to balance public accounts, paradoxically those who comply are the most harmed, which not only compromises the economic viability of hotels, it may also distort competition.

As for political stability, a number of reports from independent sources have indicated a deterioration of the political climate although this is still yet not evident on daily operations. Nevertheless, there is a growing sense of uncertainty among foreign investors.

On the other hand, the Government's support of new foreign investments, including fiscal benefits to investors, stimulates the entry of new companies into the country. New initiatives such as the creation of the Great Limpopo Trans-frontier Conservation Area, the rehabilitation of Gorongosa National Park, just to name a few, create great incentives for investors given the high potential of these areas for tourism. Specific tax exemptions geared for new investments are also encouraging signs. The government is committed to streamlining legal and financial processes, efforts which will hopefully lead to investors being able to spend less time on non-revenue earning activities.

Considering all of the factors analyzed above, there is definitely room for a strong association that can improve the overall political climate and legal framework relevant to the industry.



3.3.2 Economic Factors

Economic factors are those that affect the purchasing power of potential clients, as well as the cost of capital, and more broadly, all those affecting the bottom-line of the business.

Table 6 - Pestleanalysis

PESTLE ANALYSIS - ECONOMICAL FACTORS					
External Factors	Description	Impact		Impact Period	Importance
		Positive	Negative		
ECONOMICAL	GDP growth	Creation of wealth and demand for tourism products and services		Medium term	High
	Structural economic unbalances (ex: external trade account, State deficit,...)		It compromises future growth, induces country indebtment, increases risk	Medium to Long term	High
	Exchange rate volatility	Depreciation of internal currency increases competiveness (foreign market)	Increases risk for investor and externally-induced inflation of costs	Short to long term	High
	High interest rates		Increases finance costs	Medium term	High
	Inflation rate		Diminishes competiveness increases uncertainty	Medium term	High
	Salary and other input prices (Tourism)		Diminishes competiveness increases uncertainty	Medium term	High
	Growing demand (Tourism)	Attracts new investement, increases revenues		Medium term	High

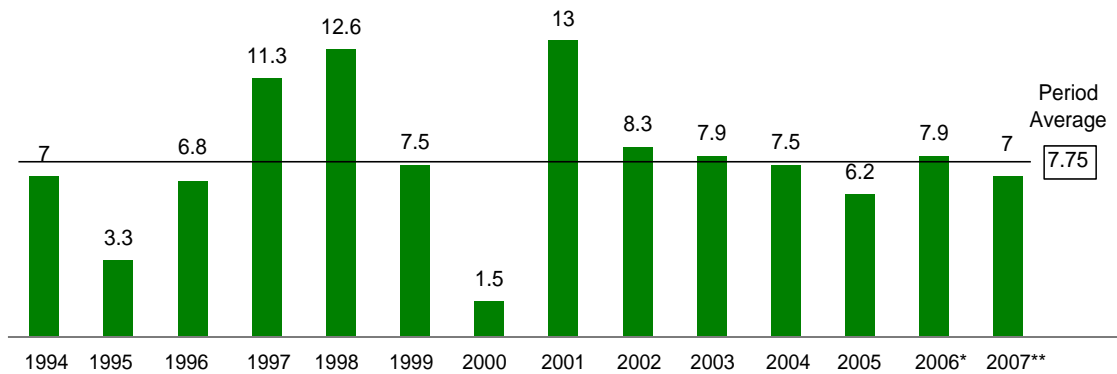
Source: Consultant Analysis

The economic macro-environment in Mozambique is quite positive. The country has enjoyed some of the highest GDP growth rates in Africa over the past few years, and is expected to present real GDP growth of 7.2% in 2006 and 7.5% in 2007. Still there are a number of distortions and unbalances in this growth, to a great extent artificially inflated by large projects that retain very limited wealth in the country. The GOM has targeted Inflation to 7.5% in 2007. In recent years Inflation rate has been in the upper 1 digit / lower 2 digits and is on a generally gradual down trend.



GRAPHIC 6

Annual GDP Growth Rate (%)



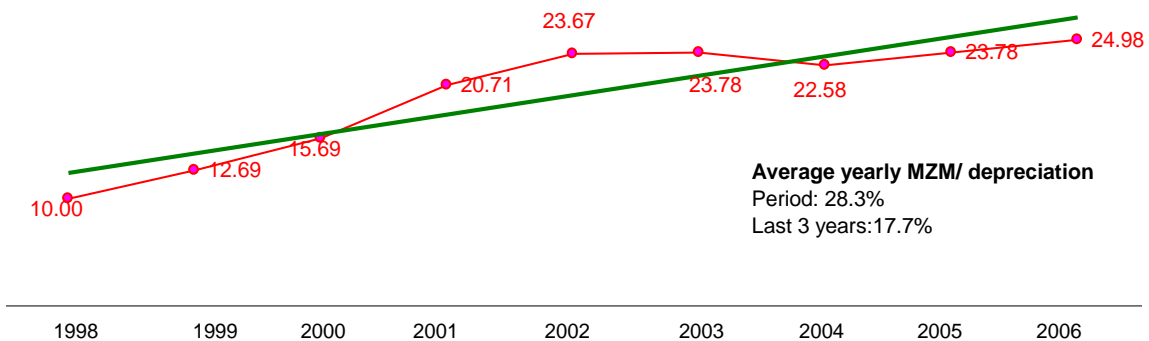
Source: World Bank / Banco de Moçambique, GOM * Estimate 2006; ** GOM Forecasts

External payments account is highly unbalanced against Mozambique which imports far more than exports. Also the State budget is highly unbalanced and highly dependent of contributions from foreign donors. The tourism sector if well structured can effectively diminish these structural unbalances. It represents a true opportunity for the sustainable growth of Mozambique, a strong argument which should be stressed out and put to good use by AHSM. The potential tax revenues (direct and indirect) it can generate is also a factor to take into account by Government policies, not to mention the significant numbers of new employment it can generate.

Exchange rate volatility is an additional factor increasing the economic risk for private ventures, most of all those of foreigner investors as well as those most exposed to these fluctuations (ex those with finance USD/SAR denominated). It may also affect operational costs since a number of critical inputs are imported. Since most tourists come from overseas, the steady depreciation of the MTn may actually induce higher influxes of tourists, so the net result of this trade-off for the tourism sector is actually difficult to asses. Mozambique has been able to gradually reduce exchange rate volatility to the USD.

GRAPHIC 7

Exchange Rate changes (MZM/USD)



Source: Ministry of Finance



The distortions created by arbitrary salary increases as well as fluctuations in other input prices are also a risk factor hotels have serious difficulties to shield themselves from. Labour for instance is perceived to be highly expensive, since its productivity is very low and hotels have to take care of most training in-house due to the lack of skills of most employees.

All factors contributing to high inflation rate and price volatility create disturbances to the operations. In the same manner, high interest rates - to a great extent sustained by the funding of the government deficit and by the perception of high country risk - is also delaying the development of a healthy economy. With a clear negative impact on the expansion of the private sector this is particularly relevant to our scope of analysis: the tourism industry. The higher costs associated with long term projects, such as investment in infrastructures, particularly needed for the growth of the industry, are also an important limiting factor to its development.

The positive aspect of the macroeconomic environment is the sharp increase in demand in the tourism industry. The number of tourists entering Mozambique from overseas has been raising in the past few years and the trend is getting stronger. Although hard to identify what is actually driving this demand, most of all when one looks at the high costs of traveling to an within the country, the fact is that Mozambique is attracting more visitors every year. This, however, is not translating into better results for the hotels, particularly in the city of Maputo, which have been seeing their occupancy rates and margins deteriorate. The trend is affecting unevenly the industry, and the new hotel units added on in recent years may help explaining the down turn in results.

3.3.3 Social Factors

The relevant social factors include the demographic and cultural aspects of the external macro-environment.

Table 7 – Pestle analysis

PESTLE ANALYSIS - SOCIAL FACTORS					
External Factors	Description	Impact		Impact Period	Importance
		Positive	Negative		
SOCIAL	HIV AIDS and other health problems		Absentism, high turnover and low return on investment in HR	Long term	High
	Endemic widespread poverty		small internal market and other side-effects (theft, primary needs vs long term investment)	Long term	High
	Lack of qualified people and low education standards		High costs in training and poor quality of services	Long term	High
	Low entrepreneurial and development of participative citizenship culture		Companies need to do all related/supporting activities in-house; difficulty mobilize for change	Long term	High
	Friendly non violent culture	Natural good environment for the hospitality industry			Long term

Source: Consultant Analysis



Despite Mozambique's impressive reconstruction and growth over the past decade, significant efforts are still required to improve socio-economic and quality of life indicators. The incidence of absolute poverty in the country remains high at over 50%, although the government is aggressively trying to combat the problem as outlined in the latest 5-year strategy for poverty reduction (PARPA II).

On the other hand there is the issue of HIV/AIDS and Malaria, serious and chronic illnesses that negatively affect the economy due to worker absenteeism, impaired productivity and the destruction of the social fabric of many communities. Mozambique has an approximate 16% rate of HIV infection and a subsequent high level of mortality, due partly to the lack of a well-developed medical system. Malaria is also a major problem in Mozambique, and actually causes more absenteeism and is associated with a higher mortality rate than HIV/AIDS. Nonetheless, any company in the country will need to take into account the reduced productivity, increased absenteeism, and disruptive behavior that come about as a result of Malaria and HIV/AIDS.

High levels of absolute poverty and illness are, along with low levels of education and training, inter-related aspects of a self-perpetuating cycle that negatively affects the social fabric of Mozambique and creates a negative foundation for economic development. The ramifications of these social issues are not limited to one particular sector; tackling these challenges needs to be a concerted and sustained effort from several quarters including the government, the international community and private sector.

The low level of development of a participative citizenship and entrepreneurial culture also contribute to perpetuating a somehow stagnated society, less willing and motivated to make an effort to thrive and improve. Civil associations are scarce and not so effective.

The Mozambican culture is generally friendly and non-violent. To some extent the lower productivity or technical qualification is compensated by a positive and welcoming attitude. This aspect is particularly relevant for an industry where receiving and taking care of guests is at its core.

3.3.4 Other Factors

A number of other factors are also relevant to characterize the operating environment of the industry, adapting the traditional PESTLE analyzes to the most relevant in this context.



Table 8 – Pestle analysis

PESTLE ANALYSIS - OTHER FACTORS					
External Factors	Description	Impact		Impact Period	Importance
		Positive	Negative		
VARIOUS	Natural Environment	An asset that can improve attractiveness for tourists (generate demand)		Long term	High
	Undamaged, novelty as a tourist destination	Potentiates the cretion of a new branding and strategy for the sector		Short to medium term	High
	Cultural diversity and rich heritage	An asset that can improve attractiveness for tourists (generate demand)		Long term	High
	Geography (spread out, long distances, different challenges)		Difficulty in aggregating hotels and create a strong association	Long term	High
	Growing Industry	Potentiates the expansion of incitives in the tourism sector (including AHSM)		Long term	High

Source: Consultant Analysis

Mozambique possesses an incredibly diverse landscape and habitats rich in flora and fauna, from the coastal and lake shores, to a number of game parks that are being developed or rehabilitated, or the mountains and forests in the bordering areas with Malawi and Zimbabwe. This diversity can attract an equally diverse range of tourists: from pure leisure to specific segments such as diving, deep sea fishing, game watching, hunting, climbing, or combinations of these. This huge potential is nearly virgin in most areas with extensive room for growth. Because it is fairly new as a destination it offers the chance to develop the industry without falling into irreversible or serious mistakes. Also its rich cultural heritage, from ancestral cultural traditions, to gastronomy, can serve as distinctive feature of a unique destination.

In terms of the expansion of AHSM, the fast pace in which the industry is growing offers the opportunity to create a strong and dynamic association with a say in the industry future. This is as much of an opportunity as a real need, given the numerous challenges it will be faced with in the near future.

One relevant limiting factor though is the morphology of Mozambique, which is spread out over long distances between the areas where tourism is developing. This factor creates an obstacle to the creation of a single country hotel association as close contacts are difficult to maintain.

3.4 Conclusions Of External Operating Environment

All factors discussed, both those perceived as sources of risk or limiting and those perceived as potentially positive for the industry, indicate the need as well as a real space for a strong AHSM to exist and to play an active role. The industry is going trough major changes and the final shape of it will greatly depend on the intervention (or the absence of it) of its players. Only in an organized manner and in close collaboration will individual hotels or hotel chains be able to have a tangible impact on the future of the industry. Without a combined effort it is foreseeable that some of the threats/constraints the industry faces will aggravate while some potential gains will not be achieved.



Some potentially negative factors like the tax system, corruption, HIV/AIDS, bureaucracy or the lack of qualified personnel have a generalized impact and can only be addressed at a level above the individual company. Individual companies will most definitely benefit from this combined strategy.

The industry growth as a whole presents the opportunity for AHSM to expand. The new hotels and the increasing relevance the Tourism sector is playing in the economy mean the possibility as well as the necessity of strengthening AHSM.

We turn now to estimating the size of this opportunity.



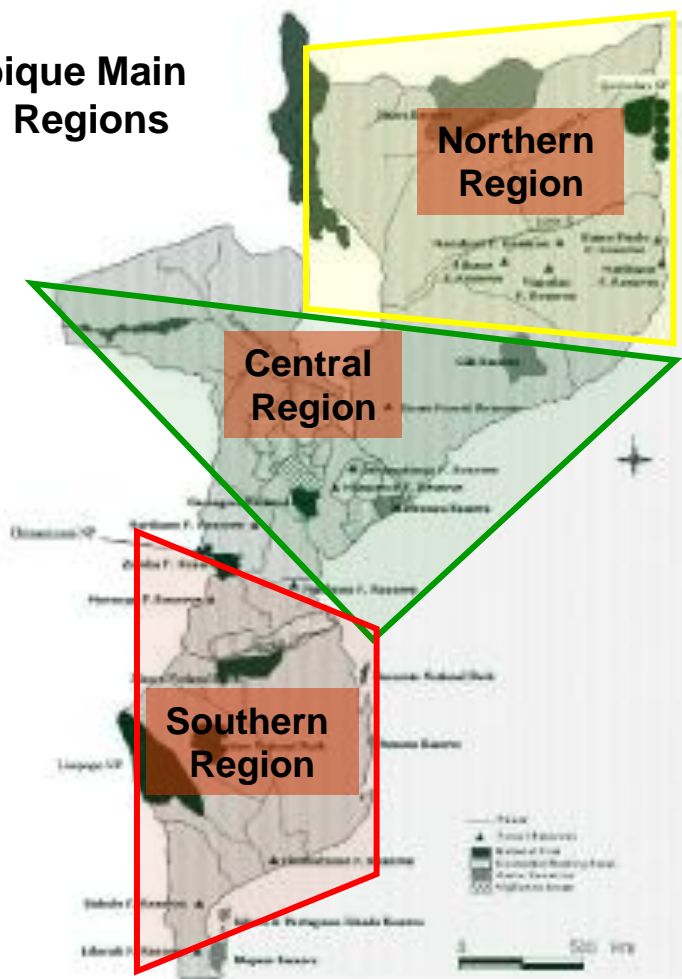
4 THE MARKET²

It is an indisputable fact that the Tourism industry is growing strongly in Mozambique. From the end of the nineties a number of hotels have been built and upgraded, in Maputo as well as in a number of regions throughout the country, with particular significance in those which are currently the most important destinations, Inhambane and Cabo Delgado. In Maputo, the 2003 conference of the African Union saw the upgrading of a number of hotel units, as this event was considered the most important organized in the country. Along the coast and in the archipelagos and even in remote areas like the Niassa lake, new hotels and lodges are operating or being developed as we speak. Further growth is expected in the near future in areas like the Limpopo trans-frontier park, the Elephant reserve or Tete, stimulated by the creation of a favorable set up or simply as a result of local economic growth.

But it is important to analyze this growth in more detail as it is not happening in even terms across the country neither is caused for one single set of reasons. Each region follows its own dynamics. In terms of tourism, Mozambique can be divided in three main geographic regions with different profiles:

FIGURE 2

Mozambique Main Tourism Regions



² understood as the market for the association



4.1 The South (provinces of Maputo, Gaza and Inhambane)

As noted in the chapter 3, most tourism is concentrated in the Southern region, notably in the city of Maputo. The three provinces account for 65% of the existing beds. The infrastructure is generally better than in the rest of the country and economic growth is more felt in this region.

The relative larger size of the business tourism in Maputo reflects its importance and the central role of the city in the country economy. In Inhambane the profile is substantially different. The province has the highest number of hotels directed to the leisure tourism and it accounts for over 50% of this segment in Mozambique. Leisure tourism is also growing south of Maputo, notably in Ponta Ouro but also in Ponta Mamoli and Ponta Malongane. In Gaza, Macaneta, Xai Xai and Bilene cater for a internal family oriented tourism. But most new hotels have been built in Inhambane province, particularly in the Vilankulos – Bazaruto area and around the capital of the province, Inhambane. Along the coast a number of units have been popping out in places like Zonguene or Pomene. This growth has been somehow falling out of state control with important problems related with the legality of licensing and tax evasion.

New developments of the Limpopo trans-frontier park, the Elephant reserve and the Libombos, are expected to foster growth in the region with a new segment of tourism oriented to nature.

The strategic plan for the tourism industry defines the market as:

- Regional/Domestic market based on sun & beach,
- International Market with specific segments: diving, eco-tourism e culture.

In addition, the business and MICE segments centered in Maputo city should play an important role.

This is the “natural” market for AHSM in terms of geographic proximity, strategic positioning and in statutory terms. AHSM has defined the Southern region as its area of implantation.

4.2 The Centre (provinces of Sofala, Manica, Tete and Zambezia)

The cetral region accounts for roughly 18% of total capacity and one out of every two stays outside the city of Maputo occurs in this region. Most tourism revolves around the trading relations within this region and the neighboring countries of Zimbabwe, Zambia and Malawi. The general standards of the hotels and services provided are low and relatively expensive. The region has not been considered as one of high potential for international tourism, although some areas, like the Gorongosa and Ximanimani parks may offer a significant potential as does the implantation of large investment projects in the Zambezi basin. Still at the moment, only a handful of hotels provide accommodation at reasonable standards. Given its lower growth rates it is likely to lose weight in the industry.

The strategic plan for the tourism industry defines the market as:

- Niche approach based on adventure and eco-tourism, both for regional and domestic markets.
- Some relevance of business and sun & beach segments



4.3 The North (provinces of Cabo Delgado, Niassa and Nampula)

The Northern region is considered to be the one with most potential, given its natural conditions (the Niassa reserve, the Quirimba archipelago and the Niassa lake) and rich cultural heritage (such as in Ibo and Mozambique islands). A considerable number of new tourism units have been taking shape in recent years and the trend is expected to continue. USAid and Technoserve are actively supporting the development of the tourism sector in the Northern Arch and regular international air connections with Kenya and Tanzania have been opened. The possibility of linking the Niassa and Selous reserves would create one of the World largest conservancy areas with great tourism potential. In 2001 less than 25% of hotel capacity was installed in the Northern region corresponding to an even proportion of total stays. However this region is growing fast and is likely to take a larger share of the sector in Mozambique.

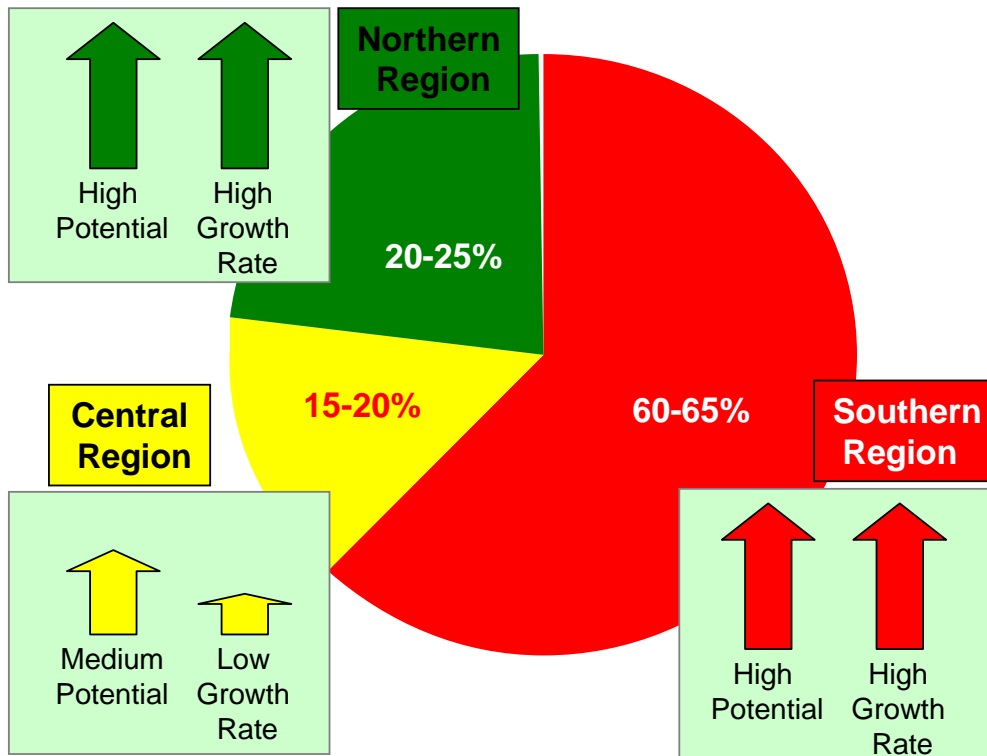
The strategic plan for the tourism industry defines the market as:

- Exclusive destination for high-end of the market, mainly international market.
- Beach & island with culture
- Niches of eco-tourism, adventure and hunting.

The following chart illustrates the relative importance of each region in the industry:

GRAPHIC 8

Relative Weigth of Tourism Regions (2004)



Source: MITUR, Consultant Analysis



4.4 Current Members And Potential For Expansion

The definition of AHSM market is central to the definition of its strategy. Two possibilities are plausible for the enlargement of AHSM:

- 1) **geographic expansion** to the two remainder regions of the country, Central and Northern, i.e. reach national implantation;
- 2) **higher penetration in the Southern region**, including the possibility of enlarging the spectrum of membership to other players in the tourism/entertainment chain value (ex: restaurants, tour operators or other entertainment providers).

The two approaches are not theoretically mutually exclusive but given AHSM's limited resources, realistically one of the options has to be preferred to the other.

We turn now to analyzing the two alternatives:

There are already other regional associations with similar characteristics to AHSM. In the Northern region it has recently been formed the tourism association of Cabo Delgado and in Nampula there is an active hotel association. Other associations to some extent represent the interests of tourism such as the Associação dos Amigos da Ilha, in the island of Mozambique. In Vilankulos (Inhambane) there is also a local association of hotels. It is unknown to us the degree of development of each association, their legal status and their current strength. It is reasonable to assume that all struggle with serious limitations, namely in forming a consistent lobbying group certainly beyond their local reach and in pooling the necessary resources to be effective.

The fact that these associations exist in limits the space for AHSM to play a national role. Expanding to the areas where these associations are already active would overlap with these local/regional structures. On the other hand they may be important allies of AHSM, given that to some extent they defend common interests for the industry, on top of their specific local agendas. Some form of articulation with these structures may nevertheless be beneficial for AHSM.

The long distances within and between regions pose a real obstacle to the effective integration of regional structures, as much as difficult the effective countrywide presence of AHSM. Adding to this, given its current internal organizational problems, it seems unlikely that AHSM can have a national reach in the near future. Even in the Southern region, there is a significant number of existing hotels that are not yet members of AHSM, both south of Maputo (Ponta do Ouro, Malongane,...) and North (Inhambane, Vilankulos,...). The new development areas (Limpopo, Libombos, Elephant reserve,...) also offer new opportunities to the enlargement AHSM. In addition it is also feasible to open the association to new members in complementary services such as restaurants, night clubs, car rentals, event organizers and other. In short there is enough room for growth in the region that could be achieved with less resources and that ultimately aggregate more closely related interests. Even within the industry, different regions have different problems and, although some issues are pertinent to the whole of the industry, setting the priorities and a common agenda may prove to be a difficult task.

In conclusion it seems more appropriate to consider the second option: to increase the penetration of AHSM in the Southern region, possibly enlarging the membership to other



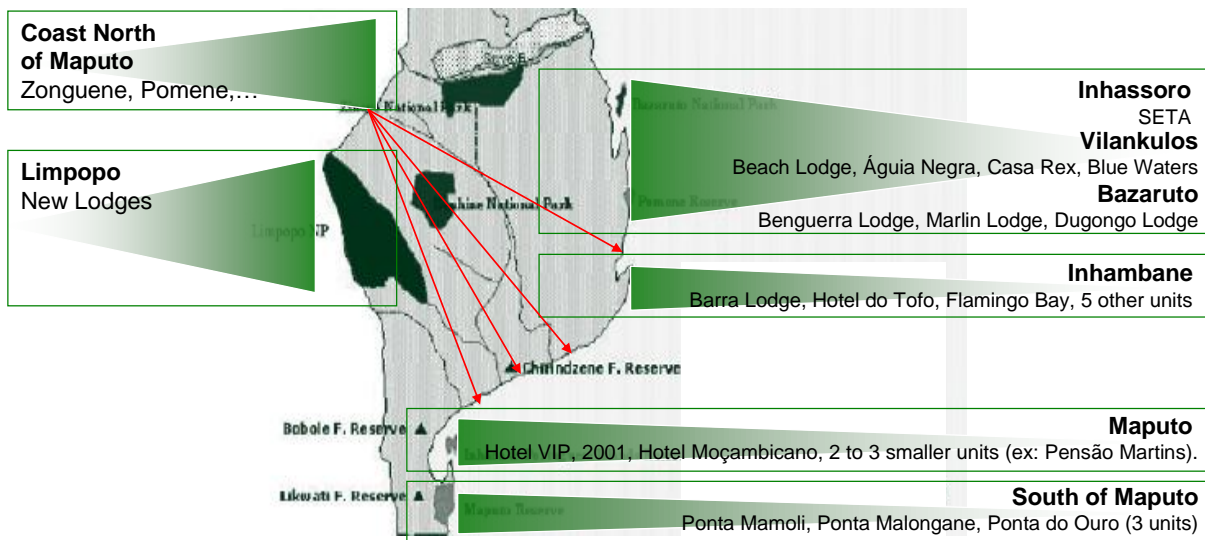
companies besides strictly hotels. Institutional relations between associations in other regions should be formed and strengthened. A confederation of the regional associations can then be formed to defend industry interests, with a well defined common agenda and adding strength to the individual associations.

4.5 Market Size

It is difficult to obtain reliable figures on the existing hotels and even more on those that are being planned and built. In addition to the existing members of AHSM we try to identify possible members:

FIGURE 3

Different Zones Within the Southern Region (sample of non-members)



This is not an exhaustive list, but it is clear that just considering (a sample of) the existing hotels, AHSM may easily double its size. If one considers the new projects in the Limpopo trans-frontier park, the new developments along the coast south and north of Maputo (ex: Royal Tandje Beach Resort, Hotel Dona Ana or Magaruque lodge), the potential for a significant expansion is clearly there. Doubling the size of AHSM is an achievable yet ambitious goal. A decisive expansion along the traditional membership base of AHSM would have a tremendous impact on the representative role and legitimacy of AHSM within the industry. It could also mean significant additional resources, possibly from the current 50.000 USD yearly up to 100.000 USD or even more.

In addition, if the decision is to open the association other companies besides the hotels, the spectrum of potential members is further enlarged. In Maputo alone a dozen of restaurants exist with the scale to contribute to the association.

There are a number of common interests at all levels between the restaurants and the hotels. Looking at the industry constraints (chapter 2), pretty much all the items in the list are relevant to both categories of players. From the training needs, to the legal framework,



the promotion or the need of supporting services. It is not coincidence that in a number of countries restaurants and hotels are normally aggregated in the same associations (ex: Angola, Portugal, just to mention closely related cases).

If properly convinced of the benefits of a structure as AHSM, it is likely that the additional hotels and restaurants can become active members of the association. This enlarged membership base can significantly increase AHSM weight, resources and bargaining/lobbying power. The challenge for AHSM is to outline and implement a consistent and focused effort to bring these potential new members into its ranks.

4.6 Segmentation

It is important to realize that the different hotels are quite diverse and that the industry is far from homogeneous. With the integration of other hotels geographically disperse and away from Maputo, as well as including other types of members, it is likely that these differences will become more than apparent. Understanding these differences is crucial for establishing an effective association capable of representing all members' interests and to find the common denominator.

Although the enlargement may disperse the interests, it may also prove to help the association to review its priorities, set up a clearer agenda focusing its attention on fewer yet more relevant issues, which may ultimately contribute to AHSM effectiveness.

From the interviews and conversations held with AHSM members the following segments within the present membership structure may be defined:

- **Large hotels**, often part of a larger hotel chain with multinational expression (ex: Holiday Inn, Rovuma, Avenida, Polana, Indigo Bay (Rani), Girassol, Ibis)
- **Local groups** (ex: África, Terminus & Monte Carlo)
- **Smaller units** (Hoyo Hoyo, Mozaica, Santa Cruz)

The hotels differ in quality standards and market focus, size, nationality of capital, amenities and location. Although these distinctive factors are important in the categorization of the hotels, they do not represent significant dividing factors for AHSM. Their objectives and the constraints they face are in their majority the same. Devising a common agenda and setting priorities for AHSM is not greatly affected by these differences. These will become more important with AHSM enlargement.

The inclusion of hotel units outside Maputo, will shift the importance of issues specific to the city, (from ex: parking fees or city hall taxes, local transportation, city events/promotion, international links... to issues of other nature such as conservation/environment, land rights, roads, international bookings, internal air connections). It is important to understand that enlargement will create the need to include new views and priorities into AHSM agenda. Most of outside hotels that AHSM can bring in are lodges in coastal areas catering for leisure tourism. With the Limpopo, Elephant reserve and the numerous developments along the coast, this shift is likely to be more pronounced.



Also a possibility for expanding AHSM is the inclusion of individual members, namely students and academics in the relevant fields of study, consultants or simply people interested in the sector. The benefits of such an option would be to enlarge the membership base and to get other type of contributions from members. In addition to a larger albeit marginal fee base, these categories could contribute with research, sector studies and analysis as well with technical support. The students would be a long term source of new blood and regeneration of the AHSM itself.

We can then resume the above discussion under the following different segments or member categories:

- City Hotels: different categories and sizes
- Lodges
- Restaurants
- Other service providers
- Individual members (students, academics and consultants)

It is also important to realize that it is really not an option for AHSM to include these new members without whom it will stagnate. The question is then how to best accommodate the differences in a positive and constructive way. Naturally most of interests are still common and all members, old and new, can take real benefits from a strong AHSM. In specific instances the inclusion of diverse members can help the development of more “all including” segments such as the MICE or incentives. These will require the more city/business oriented hotels and services as well as nature/leisure hotels and lodges around Maputo. A common strategy is clearly an advantage for the different members.

We will not analyze this segmentation in terms of which hotels or other players would be more beneficial for AHSM as we believe that, ultimately, all types can add strength and increase the association’s role as a wider representative of the tourism industry.

The following table discriminates the different segments that AHSM could develop in its expansion strategy. The potential revenue is indicative but reasonable. Overall AHSM could aim at doubling its annual revenues or possibly even more. This would boost AHSM ability to play an active role going a long way to prosecute its objectives.



Table 9 - Segment Characterization

Segment characterization			
Segment	Characteristics	Size	Potential Revenue
Hotels	<ul style="list-style-type: none"> - Traditional members of AHSM - Generally with a coherent and common interests - Geographically concentrated in Maputo - Likely to lose weight as leisure segments develop 	<ul style="list-style-type: none"> - Current most of AHSM active members - potential to add 25 to 50% in AHSM current numbers in the immediate future (Southern region) 	<ul style="list-style-type: none"> - along the same lines of existing members with relevant financial capacity - membership fees important - estimated potential to increase 25 to 50% AHSM revenue
Lodges	<ul style="list-style-type: none"> - Less represented in the AHSM - Specific set of interests but still a large number of common interests with traditional members - Geographically more dispersed - Importance likely to increase as leisure segments develop 	<ul style="list-style-type: none"> - Significant numbers already operating - potential to boost AHSM membership numbers as industry develops, bringing its membership base up to nearly the double - Most significant hotel group under-represented in AHSM 	<ul style="list-style-type: none"> - Potential to add up to 75 to 100% of existing membership fee revenue - As segment evolves additional members may bring even higher contributions
Restaurants & other	<ul style="list-style-type: none"> - New group of members - strategic positioning shift of AHSM (may require statutory changes) - number of common interests - Potential to increase AHSM representative role 	<ul style="list-style-type: none"> - significant number of potential new members - smaller in size but larger in numbers 	<ul style="list-style-type: none"> - lower individual contribution but potential large numbers may have a significant impact in membership fees /association revenues - estimated potential of 10 to 20% increase in annual revenues
Individual	<ul style="list-style-type: none"> - Additional revenues and source of regeneration - can aggregate value with research and relevant industry studies 	<ul style="list-style-type: none"> - Potentially a significant number of new members 	<ul style="list-style-type: none"> - Less significant / not negligible -membership fees a fraction of current members - Estimated 5 to 10% increase in membership fees

Source: Consultant Analysis

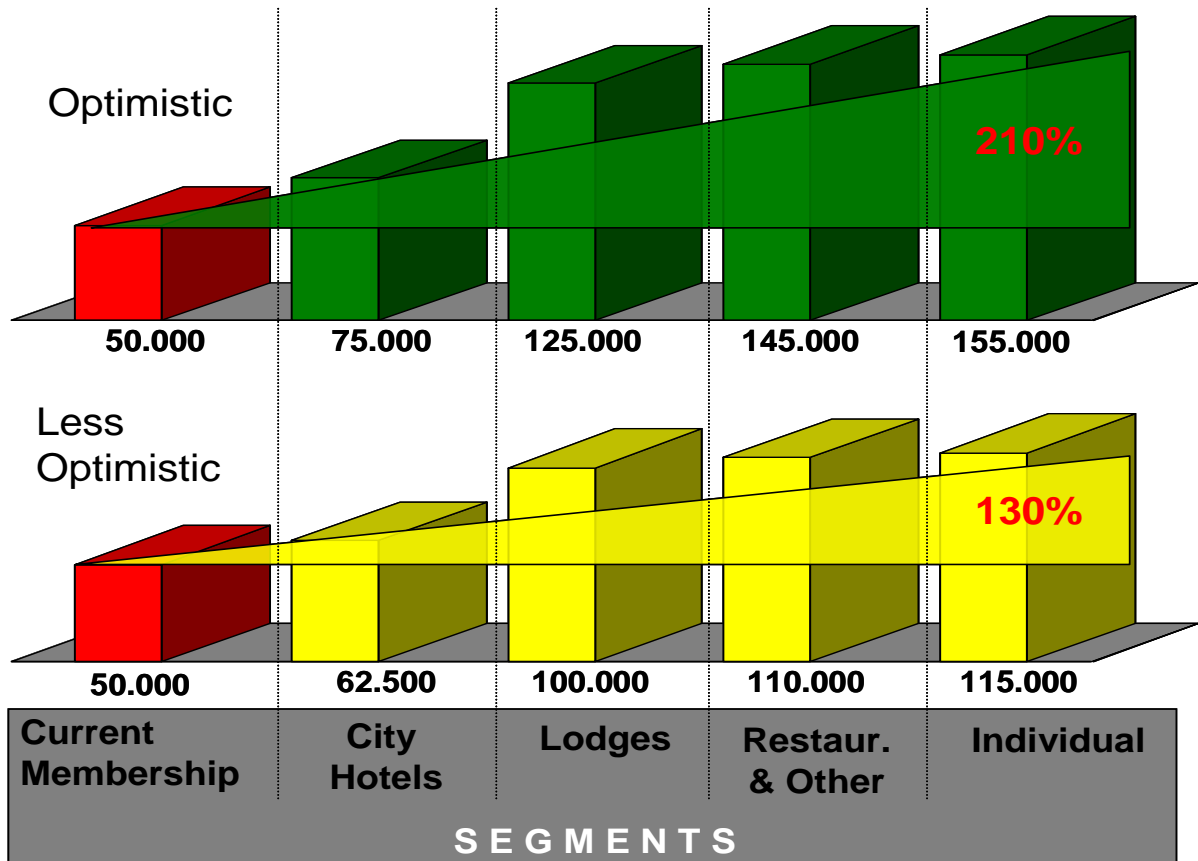
For each segment there is a potential for generation of additional revenues. Given the potential for expansion in each segment, where most industry players are not yet members of AHSM, the increase in revenues from membership fees is high and should be a good base for strengthening AHSM financial position and capabilities.



The following graphic depicts the growth in revenues achievable for the expansion route proposed. Although these are certainly rough estimations, the bottom line is the real potential for substantial and sustainable growth.

GRAPHIC 9

AHSM Expansion: Revenues Growth Potential



Source: Consultant Analysis

Even in a less optimistic scenario AHSM can increase significantly. These added resources could go a long way to boost AHSM capabilities.

4.7 Conclusions

A number of factors point to the intensification of AHSM in its original geographical area, the Southern region. The existence of local associations in other regions makes it difficult and less meaningful to target these regions. The long distances also difficult the effective expansion to remote areas. Building close relations with similar associations in other regions tending to the formation of a confederation type of association with a common general strategy seems to be a more viable and productive alternative.

There is enough room for AHSM to grow by actively targeting the lodges along the coast line from Ponta do Ouro up to Inhassoro and inland to the new areas where tourism is



taking shape, namely in and around the Limpopo trans-frontier park. Simultaneously the inclusion of new membership categories, namely restaurants and other service providers in the tourism value chain, with common interests to AHSM current members, can significantly increase AHSM membership base. This positioning has already been internally discussed and

The proposed market strategy and expansion focused on including new segments/players along the industry value chain has the potential to increase the representative strength of AHSM while generating significant additional resources. The industry is growing and offers a range of growth opportunities that AHSM can not afford to exclude or it will risk stagnation and decline. The emergency of new tourism associations, although in principle beneficial for AHSM, also means it may lose its relevance within the industry if it does not evolve.

In order to attract new members it is important that new members, as well as current, perceive the benefits of participating in AHSM. An important part of this perception derives from the ability of AHSM to actually deliver measurable and tangible results to its members. Before we discuss what these may be, we turn now to analyzing the current status of AHSM. We highlight the main weaknesses and strengths in order to define its real capacity.



5 THE ASSOCIATION

5.1 Strategic Positioning

According to its statutes AHSM objective and mission is “to defend and promote of the rights and interests of the hotels” in the provinces of Maputo, Gaza and Inhambane. AHSM was generally created to provide a network and forum for addressing tourist related issues.

Only hotels that have activities in the three southern provinces may be effective members of AHSM with the right of vote. Other hotels operating outside this region and/or other non-hotel companies pursuing common interests may join AHSM with limited rights (namely as non-voting members). More specifically the statutes refer a number of objectives that may be resumed as follows:

- 1) Creation of a climate conducive to continuous improvement of the business environment in the Hotel and Tourism sector in Mozambique;
- 2) Maintaining a constant dialogue with the government, national and international organizations as well as other institutions in the same line of business;
- 3) Conduct industry negotiations with the unions;
- 4) Promote technical training, conferences and other events relevant to the industry;
- 5) Promotion country's image as a whole, particularly the southern part of Mozambique namely the provinces of Maputo, Gaza and Inhambane.

A number of policies have been prioritized to achieve AHSM strategic goals:

- Acquisition of new members;
- Conducting and implementing training programs and seminars in connection with the hotel industry;
- Enable the association to have a formal voice when regional and governmental decisions are being planned which affect the Mozambican hotel and tourism industry;
- Lobbying critical issues of interest to it's members and the industry;
- Market and promote Mozambique as a tourist destination domestically and internationally;
- Organizing and participating in local and international trade fairs and exhibitions;
- Assisting in setting up and implementing a complete and objective grading system for the hotel industry;
- Introduction and implementation of a collective bargaining wage system whereby salaries are standardized by the industry and paid according to fixed specifications according to experience and training;
- Updating and improving the associations website and brochure;
- Forming one national association by integrating the other associations at provincial level.



In its internal document “Estrutura de Serviços da AHSM” (Structure of Services of AHSM), from the 17th of April 2001, an extensive list of activities further detail the activities and services AHSM should provide. We will cover this idea of how AHSM materializes its goals when we analyze in more detail the options open and suggest a plan for the coming years.

5.2 Ownership

AHSM belongs to its members. They act as the shareholders as much as in a private company. Statutorily the effective members will decide on the management team (executive board), approve the budget and overall plan for its mandate. Decisions are generally taken on a democratic fashion, one member one vote. Traditionally membership fees have also accounted for the bulk of AHSM resources.

However, as it happens in a number of BMOs, there has been a growing detachment of members from the association. If these still participate in the annual general meetings, throughout the year their involvement is pretty low. Ownership without participation leads to the dilution of the links between the members and the association. Members do not feel as if they are in fact the owners. There is a low perception of belonging to a group or a common identity. Reality contradicts the association spirit encompassed in AHSM statutes.

5.3 Historical background

In order to better understand its current status and to propose a way forward, it is important to review the evolution of AHSM from its inception in March 2002.

Although the history is much richer and has a number of important steps in between, we will highlight the most relevant aspects of AHSM recent past.

Inception and first years

Following its legal constitution by the 12 founding members in 2002, AHSM was able to grow in numbers reaching a total of 24 effective members by the beginning of 2004. During this period AHSM was able not only to legalize its status but also to build the necessary structure to function. It acquired all the necessary office equipment, rented the premises and hired the necessary staff to support its activities. It was also able to pool the necessary financial resources to fund its establishment. From the meeting reports can be seen the relevance and reach of the issues discussed and some achievements were made: some coordination of efforts between members in the participation of tourism fairs, the mobilization of external financial resources to cover for the participation in international events and the organization of structured training courses in relevant technical areas. The creation of a web site, a brochure and a news letter reflect the effort.

Important to note was the hiring of a full time executive director that should enhance AHSM capabilities and effectiveness. A written job description clearly defined his mandate. Also important is the fact that most meetings were documented and legal requisites have been consistently met (ex: statutory accounts, general assemblies, etc).

There were a number of obstacles to overcome but generally the information analyzed point to a well structured association with members showing interest in its development.

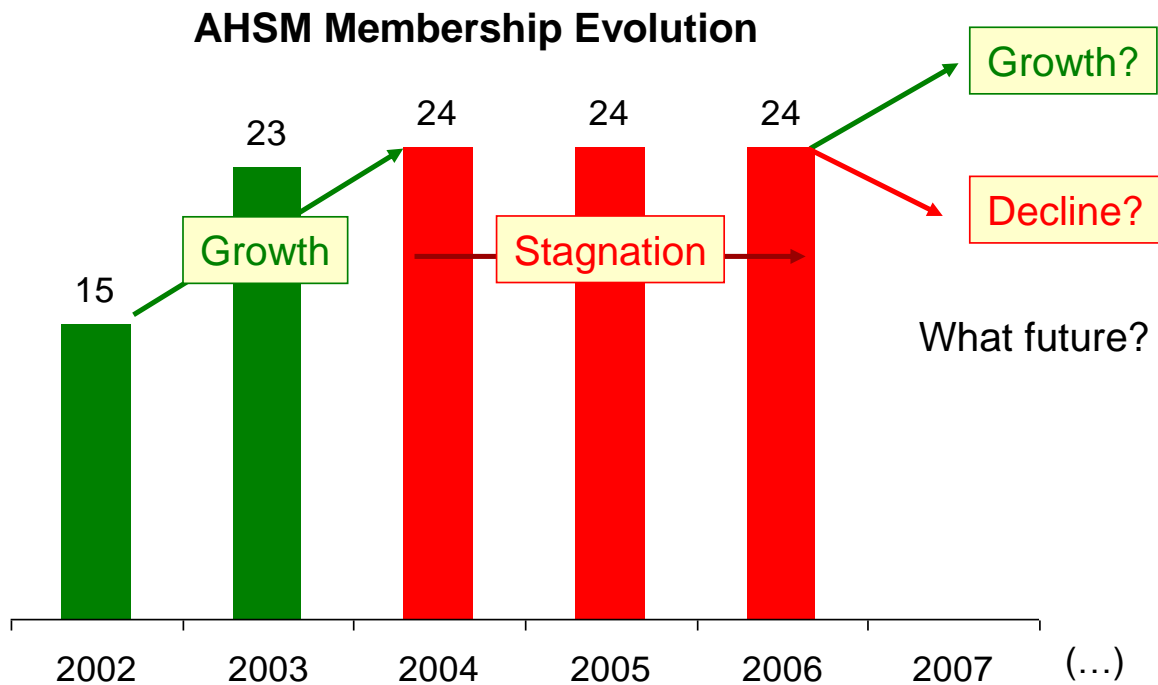


Recent years and stagnation

Gradually AHSM has been losing its initial momentum. The trend is well sustained by the evolution of membership based (which has generally been stable from 2004). It is also observed by the increase mention to late payments of membership fees and increasing disinterest on the association's activities. The general feeling of the members contacted throughout the preparation of this report is of disappointment and frustration. In fact the participation and response from AHSM members to every request has been very poor (ex: the workshop was attended only by 6 members and only three members sent their comments on the web site prototype put online). The early initiatives, such as the newsletter have not recently been followed up and were simply dropped. Criticism has settled in has the main form of participation from members and very little has been achieved. Members question the relevance of continuing to belong to an association for which they derive no benefits and no return on their paid in fees.

The most important indicator for BMO development is any measure related to increasing membership participation. The following graphic illustrates the evolution of AHSM and the question marks on its future.

GRAPHIC 10



Source: AHSM, Consultant Analysis

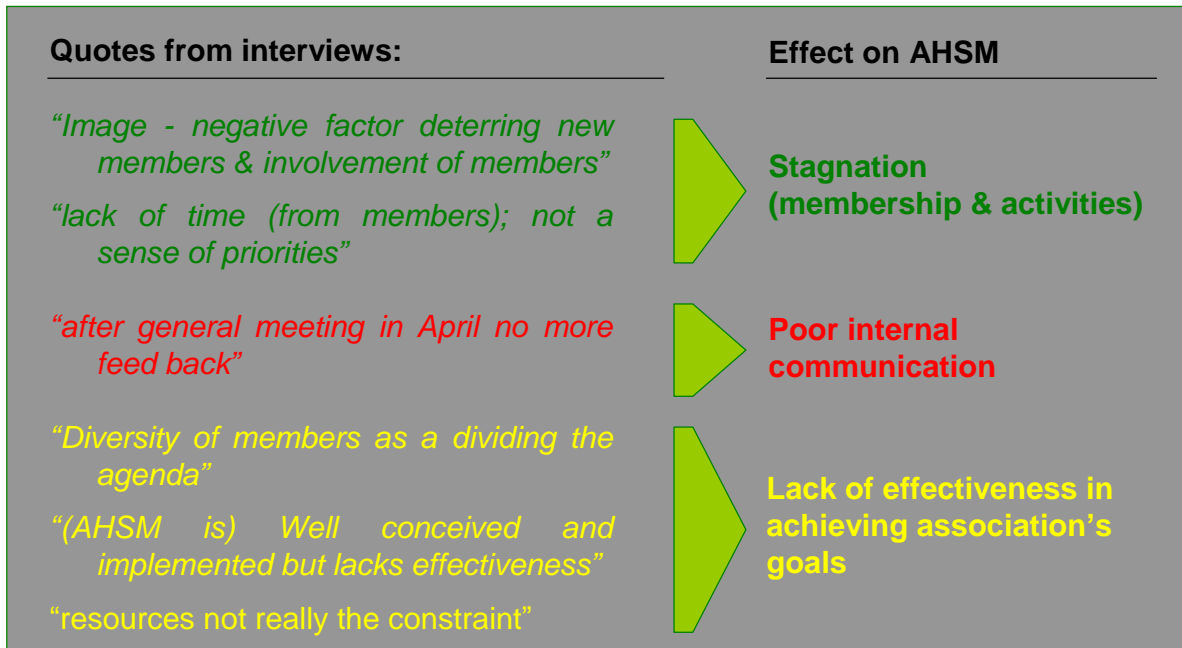
Although in rather simplistic terms, the above describes the two main phases of AHSM history.

Current status

The current situation is of a general skepticism and pessimism. In the following table a few quotes from the interviews with AHSM members illustrate their current perception of AHSM.



FIGURE 3



Source: AHSM, Consultant Analysis

During the workshop held in April 2007, a number of specific issues were added by participants. In general the main factors pointed out for the demobilization of AHSM members may be resumed as:

- Lack of real, tangible and immediate benefits perceived by members;
- Lack of internal communication;
- Lack of a sense of "who is responsible for what" and a fuzzy picture of the current strategy;
- Lack of a sense of belonging;
- General perception that AHSM is not active or effective in defending industry's interests.

The current situation is common to a number of other BMOs in Mozambique. The incipient private sector and the lack of tradition in this sort of associations combined with a lack of widespread active citizenship are not exclusive to AHSM.

Nevertheless, it is somehow a paradox that AHSM is stagnating while the tourism industry as a whole is actually growing. Even more so because this occurs when the industry is faced with a number of challenges and hotels would strongly benefit from a joint effort.

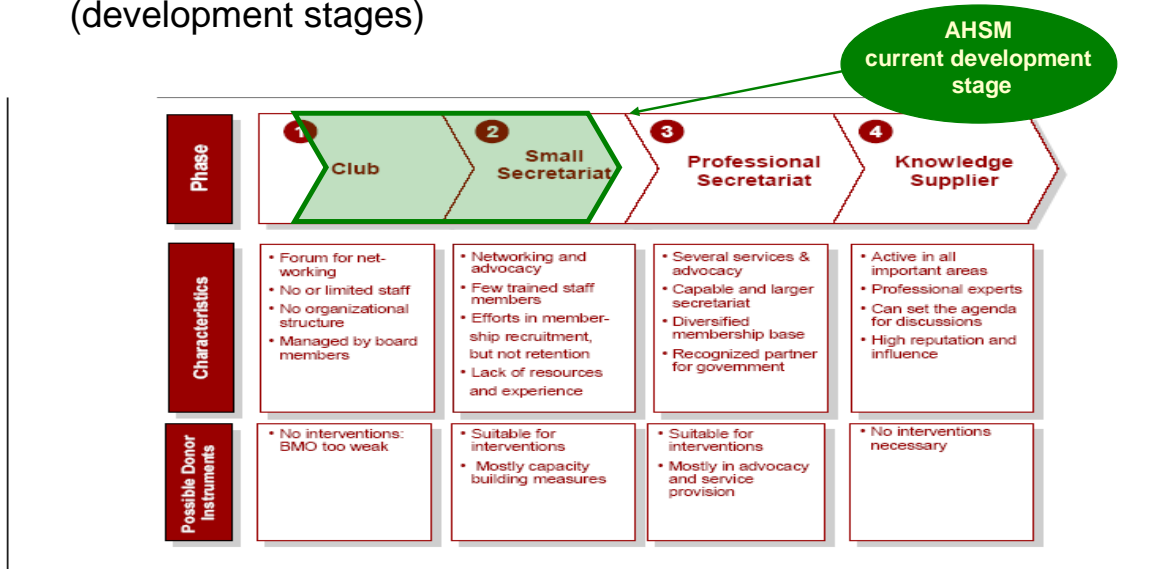
AHSM is at a decisive point in its history. It has been pointed that the next general meeting to be held in May should decide on a radical change of the state of affairs or on the termination of the association. It will provide the forum for a profound internal discussion.



On a more positive side, it is important to understand that a number of BMOs such as AHSM go through moments of crisis. The following table indicates broadly the current stage of development of AHSM.

FIGURE 4

Business Membership Organizations (development stages)



Source: Scheme developed by the Confederation of Danish Industries.

It is important also to recognize that a lot of important steps have been given and important goals have been achieved. In addition, some of the negative points indicated by AHSM members do not require large resources or complex actions to be corrected. In fact, some solutions may be implemented with simple changes in procedures and using some creativity. Yet, in order for AHSM to proceed to the next stage, a number of internal issues have to be urgently addressed.

5.4 Financial Background

AHSM has been operating with a balance capacity between revenues and costs. Membership fees have been able to cover operational costs and additional funding has been obtained to finance specific activities. There is virtually no debt and traditionally a small surplus is left over every year.

Membership fees have been defined for each member according to its size and turnover. Since fees depend on occupancy rates – a contribution from each room occupied -, they are not fixed. However this has never led to situations of rupture. Budgets are generally met and expenditures kept within acceptable boundaries. Accounts have always been approved by members without significant reserves. Accounting has been outsourced and complies with Mozambican law.

Below the evolution of expenditures and revenues over the last four years:

**Table 10 - AHSM Costs & Revenues**

(values in USD)	BUDGET				REAL	
	2004	2005	2006	2007	2003	2004
Costs						
Salaries	14,400	13,200	14,520	14,520	7,840	9,280
Taxes	600	600	660	660	407	18
Utilities	960	600	660	660	300	4,788
Cleaning	360	300	330	462	146	
Rentals	9,600	9,000	9,900	9,372	8,400	
Telephone	4,200	4,008	4,409	2,112	4,241	
Stationary	1,200	1,920	2,112	1,584	1,070	0
Legal Fees	540	540	594	594	0	0
Maintenance	1,200	1,200	1,320	660	818	
Vehicle Maintenance	1,200	1,920	2,112	1,188	0	
Audit Fees	2,400	0	0		0	
Financial Expenses	1,200	1,164	1,280	1,280	408	779
Marketing	3,600	7,200	7,920	7,920	0	
Miscellaneous	3,600	4,920	5,412	3,300	11,501	11,153
Insurance	180	1,080	1,188	1,188	146	
Travel Expenses	3,000	4,800	5,280	5,280	0	
Fuel				1,412		
Newsletter				1,122		
General Assembly	0	4,560	5,016	8,250		
Suppliers Services						33,398
Total	48,240	57,012	62,713	61,564	35,276	59,416
Revenues						
Membership Fees	49,200	61,810	67,991	61,776	50,762	53,382
Other					2650	6,341
Total	49,200	61,810	67,991	61,776	53,412	59,723
Net Result	960	4,798	5,278	212	15,486	-6,034

Source: AHSM

We had access to the 2003 and 2004 accounts as well as to 2004-2007 budgets.

From the analysis of the real figures for 2003 and 2004 we observe that salaries and office rental charges account for a significant portion of costs. Miscellaneous (non-discriminated) expenditures have a high weight in the overall cost structure. These should be better defined in order to provide a more accurate picture of the cost structure.

As for revenues, membership fees account for most of revenues, varying between 90 to 100% of the total. Revenues (budgeted) have been quite stable reflecting the unchanged membership base over the period. Given the inflation, stable nominal income actually means decreasing income in real terms and therefore AHSM has been losing financial capacity. Traditionally, revenues have been enough to meet general expenditures of AHSM permanent structure. Most members have not defaulted in payments although these are often collected with some delay.

Overall the financial situation of AHSM is balanced and the outsourcing of the accounting function has kept the legal compliance requisites under control. The annual reports have



been submitted and approved in the annual shareholders' meeting with no significant reserves. A more straightforward correspondence between the budget and the plan of accounts is advisable to make clearer the assignment of expenditures within budgeted categories.

Still, the overall balance between expenditures and revenues leaves little room for expansion without additional funding sources. Therefore it is crucial that AHSM finds new/additional revenues in order to have the resources for new initiatives. These additional resources would allow for covering the activity related costs beyond the internal administrative structure.

If it is to increase its intervention at various levels, AHSM has to improve this situation by it through expanding its membership base and/or through finding additional sources of revenues.

Following the resume of the major findings over the contacts made with AHSM members and information received from the association, we turn now to a more structured systematization of the association strengths and weaknesses.

5.5 SWOT Analysis

STRENGTHS

- **Well structured association**

AHSM has done a good job in structuring itself, from a legal and internal governance stand point. What it lacks in effectiveness it has in its formal framework. From the clear definition of its mission and objectives, to the internal architecture of governance and the role of statutory bodies, AHSM has been clearly defined and systematically complied with this definition. This constitutes a solid platform for the association.

- **Financial Resources**

The members are in sufficient number and have the financial strength to support the minimum requirements of AHSM.

- **Shown some capacity to organize meaningful events**

Despite the limitations, AHSM has been able to launch a number of initiatives, from which the brochure, website and newsletter or the training courses, are good examples.

- **Resilience**

Although the criticism has been growing, the fact is that AHSM has resisted for already 4 years to the obstacles. And criticism also reflects the interest of members. If well managed, this interest may translate in real commitment.

- **Adequate cost analysis and controlling**

Often a major problem in BMOs, it is the case with AHSM. Accounts have been clearly presented and approved without real opposition or reserves. The option for outsourcing the accounting function has proven a viable and effective solution.



- **Independence from government**

AHSM has been an independent association and clearly managed by members with no interference from external pressure. Its relationship with relevant governmental bodies is generally positive, although not frequent.

WEAKNESSES

- **Weak internal communication and public relations**

A serious problem with AHSM and often mentioned by members as a factor that prevents the development of the association. The lack of communication reinforces the perception that nothing is being done despite a number of initiatives actually taking place, both at the AHSM and at individual members level.

- **Lack of qualified and dedicated staff**

Particularly important is the lack of time from the members of the governing bodies to actually manage the association.

- **Lack of systematic needs assessment**

Resulting from the little time and though devoted by members and governing bodies.

- **No strategic planning**

Other than the annual planning and budget, often not followed through and the initial implementation of AHSM, there has been little consequent planning.

- **Lack of services to members**

The services are too few and far in between. The training courses although positive were perceived as a one off and have not had any follow up since.

- **Stagnated membership base**

The membership base has been constant over the past three years. In addition there is increasing dissatisfaction from the current members which may actually result in members dropping out.

- **Negligible influence on government policy**

The lack of initiative finally translates into a weak intervention and influence on relevant legislation being passed. The new system of classification of hotels is one such case, where hotels were confronted with important legislation, understood as detrimental to the industry and were not able to mobilize in order to change it. It is striking that the government is taking the initiative, defining the agenda for the industry. The hotels take a reactive role and ad-hoc initiatives do not change this scenario.

OPPORTUNITIES

- **Growing interest in Mozambique Tourism industry**

The industry in Mozambique is growing at a fast pace. It is increasingly gaining international media coverage. Despite all current unbalances Mozambique is perceived as an exotic and exclusive new tourism destination. Most catalogs from operators in Europe direct their Mozambican product to the high end of the market. Emblematic projects such as the Gorongosa National Park or the Limpopo trans-frontier conservancy area are acting as ambassadors of Mozambican Tourism with large media exposure and contributing to this positive image. This is a valuable asset. If well managed, it will reflect in a stronger



demand, particularly in the top end segments. New players in the sector will mean a larger base for AHSM expansion.

- **A number of challenges will require joint action**

The number of common and important challenges the industry is facing will require the coordination of efforts from hotels and other related industry players. Associations such as AHSM are privileged forums for this joint effort. Naturally hotels will seek forms of aggregation to defend their interests and AHSM is in a good position to serve as the platform for such effort. Negotiation on a number of important legislation, incentives and promotional actions is required.

- **Interested members**

Despite the criticism and lack of effective involvement, most members understand the value and relevance of a strong AHSM. If well nourished this may ensure the resources AHSM requires to develop. The frustration perceived within the members reflects their high expectations rather than the perception that a structure like AHSM has no meaning.

- **Government interest**

Also the top Government executives favor the existence of AHSM. The existence of structures representative of the private sector contribute to the development of adequate policies and legislation. Policies have been seldom influenced by AHSM mostly because of its absence and lack of initiative than by a hostile Government. The minister of tourism himself has voiced his desire to see stronger associations in the sector that can be instrumental to the design of policies and the implementation of the Government strategy for the sector.

THREATS

- **Continued inertia**

The main threat for AHSM comes from within. If AHSM is not able to turn around its internal organization and regenerate itself it risks fading away. This point is particularly urgent and requires immediate action.

- **Upcoming similar associations**

AHSM has still a space and as a prime representative of an important share of the industry. But new structures are emerging with similar purposes, namely the local and regional hotel associations, and these may not only erode AHSM membership base but also reduce its importance as a privileged representative of the industry.

- **A number of challenges will require joint action**

Also referred as an opportunity, the reverse may be seen as a potential threat: if the hotels are not able to join their strength into a structure such as AHSM they will stand to lose bargaining power and capacity to face the upcoming challenges. Issues such as the negotiation with the labor unions, the urgent need for the qualification of human resources or a well structured promotional strategy for Mozambique are good examples where the industry stands to lose if it does not find a common voice, which in turn is quite detrimental for individual hotels.

In the following table we resume the SWOT analysis pointing the main strategic vectors to best combine them. The S/O Strategies represent strategies that capitalize on the internal strengths to take advantage of the external opportunities. The W/O Strategies are those



that take advantage of the outside opportunities to overcome the weaknesses. The S/T Strategies represent tactics that use strengths to avoid threats. Finally, the T/W Strategies are those that seek to minimize internal weaknesses and avoid external threats.



FIGURE 5

AHSM SWOT Matrix

<p>INTERNAL FACTORS</p> <p>EXTERNAL FACTORS</p>	<p>STRENGTHS (S)</p> <ul style="list-style-type: none"> • Well structured association • Financial Resources • Some capacity to organize meaningful events • Resilience • Adequate cost analysis and controlling • Independence from government 	<p>WEAKNESSES (W)</p> <ul style="list-style-type: none"> • Weak internal communication and PR • Lack of qualified and dedicated staff • Lack of systematic needs assessment • No strategic planning • Lack of services to members • Stagnated membership base • Negligible influence on government policy
<p>OPPORTUNITIES (O)</p> <ul style="list-style-type: none"> • Growing interest in Mozambique Tourism industry • A number of challenges will require joint action • Interested members • Government interest 	<p>S/O STRATEGIES</p> <ul style="list-style-type: none"> • Direct existing resources to extend Membership Base • Organize emblematic events to attract new members and revitalize the association (mobilization) 	<p>W/O STRATEGIES</p> <ul style="list-style-type: none"> • Improve communication (internal and external) • Review internal organization • Involve members in projects (planning, events, communication, training,...) to increase activity and participation
<p>THREATS (T)</p> <ul style="list-style-type: none"> • Continued inertia • Upcoming similar associations • A number of challenges will require joint action 	<p>S/T STRATEGIES</p> <ul style="list-style-type: none"> • Include new categories of members building on statutory definition • Focus activities on what is relevant (quality vs quantity) 	<p>W/T STRATEGIES</p> <ul style="list-style-type: none"> • Establish strong relations (protocols) with similar associations and a common agenda (confederation?) • Use new communication tools to strengthen relationships and lead advocacy efforts.

Source: Consultant Analysis



6 STRATEGY

From the analysis of AHSM we derive the basic issues to be addressed. The strategy outlined takes into account what is critical for AHSM to overcome its pitfalls and reach the next stage of its evolution process.

In the following paragraphs we will propose a set of actions that, taking into account AHSM specific circumstances, should help setting AHSM in a clear direction. Each proposed action is put into context and is explicitly related with an AHSM objective and with the relevant issue(s) it is addressing. To a great extent we define tangible and measurable targets in order to further clarify the recommendation and to allow for the future assessment of the implementation of the strategy.

6.1 *Mission, Vision and Values*

6.1.1 Mission

As it has been noted in the assessment of AHSM background and current status, the formal definition of AHSM is not perceived as being an obstacle to its development. The statutory definition of AHSM clearly states its mission and objectives. Over the course of the discussions held in the preparation of this report, the strategic objectives were seldom questioned. They are in line with what is generally accepted as the role of a BMO and consistent with the specific sector in which AHSM is. Therefore it is reasonable to assume that AHSM mission has been clear and adequate.

On one hand the enlargement of AHSM membership base, particularly the suggestion to open its membership base to other types of actors in the tourism sector besides hotels, implies a shift in AHSM strategic positioning and Mission statement.

On the other hand the suggestion to sustain growth through a higher penetration in the Southern region (in opposition to take a nationwide reach) implies no change of the original geographic focus of AHSM. The national reach is rather pursued by setting close linkages with other regional Tourism associations, ultimately formalizing these under written agreements and possibly forming a confederation.

We may summarize this shift in strategic positioning as:

“To defend and promote the rights and interests of the hotels in the provinces of Maputo, Gaza and Inhambane” (original statement)

On to:

“To defend and promote the rights and interests of the hotels, restaurants and other interested parties in the Tourism sector, be it a private company or an individual, in the provinces of Maputo Gaza and Inhambane” (new statement).

Specific objectives set in the statutes will remain unchanged. These are resumed as follows:



- Creation of a climate conducive to continuous improvement of the business environment in the Hotel and Tourism sector in Mozambique.
- Maintaining a constant dialogue with the government, national and international organizations as well as other institutions in the same line of business.
- Conduct industry negotiations with the unions
- Promote technical training, conferences and other events relevant to the industry
- Promotion country's image as a whole, particularly the Southern part of Mozambique namely the provinces of Maputo, Gaza and Inhambane.

The above will allow for the inclusion of new members other than just the hotels, while reinforcing AHSM geographic reach and objectives.

A statutory change is also required on the definition of members' categories and membership criteria. Those falling in the above categories in the three southern provinces may be effective members of AHSM with voting rights. Other companies and individuals operating outside this region but pursuing common interests may join AHSM with limited rights (namely as non-voting members).

The name may also be adjusted to reflect this renewed positioning, dropping the more restrictive denomination of "Hotels" to a more inclusive "Tourism", from Associação dos Hotéis do Sul de Moçambique to Associação de Turismo do Sul de Moçambique.

6.1.2 Vision

A clear Vision statement for AHSM has not been enunciated. This in turn may result in the lack of clarity of where AHSM is heading, mainly across its members. Being just a statement, it certainly helps all involved to adopt a common perception of AHSM objectives, which in turn would induce the discussion on how to achieve them.

A possible definition of AHSM Vision may be:

"By 2012 AHSM is widely recognized as the most privileged representative of the tourism sector in the Southern region of Mozambique. Reflecting its widespread membership base, AHSM is setting the national agenda on tourism, leading its discussion, promoting the regulatory and legal environment change, according to its members' needs and in close collaboration with the relevant authorities and similar organizations in the other Tourism regions.

Its achievements in advocating for the sector's interests and operative standards have granted AHSM a solid reputation, setting the example in the country and the region.

Financially strong, it assists its members with sound technical training effectively raising the standards of services in the industry. It has a prominent and decisive role in the promotion of the region's tourism potential conducive to the recognition of Mozambique as a top tourism destination".



The above enunciate sets ambitious, tangible and measurable targets for AHSM consistent with its mission and statutory definition. It refocuses AHSM in what is essential and serves as a benchmark for its activities and achievements. The explicit references to advocacy, training and tourism promotion are in line with AHSM objectives and reinforce the relevance of these aspects in AHSM overall strategy.

6.1.3 Values

Underlying AHSM activities and its general posture there are a number of values that may be summarized as follows:

Independence and Transparency as a means to gain the necessary credibility as an effective defend associate members' and sector's interests.

Participation, Cohesion and Solidarity of members in order to represent the common interests of associated members. These in turn will allow for effectively adding strength and value to members as stand alone units.

Sustainable social development as a contribution of the Association to the overall development of Mozambique society.

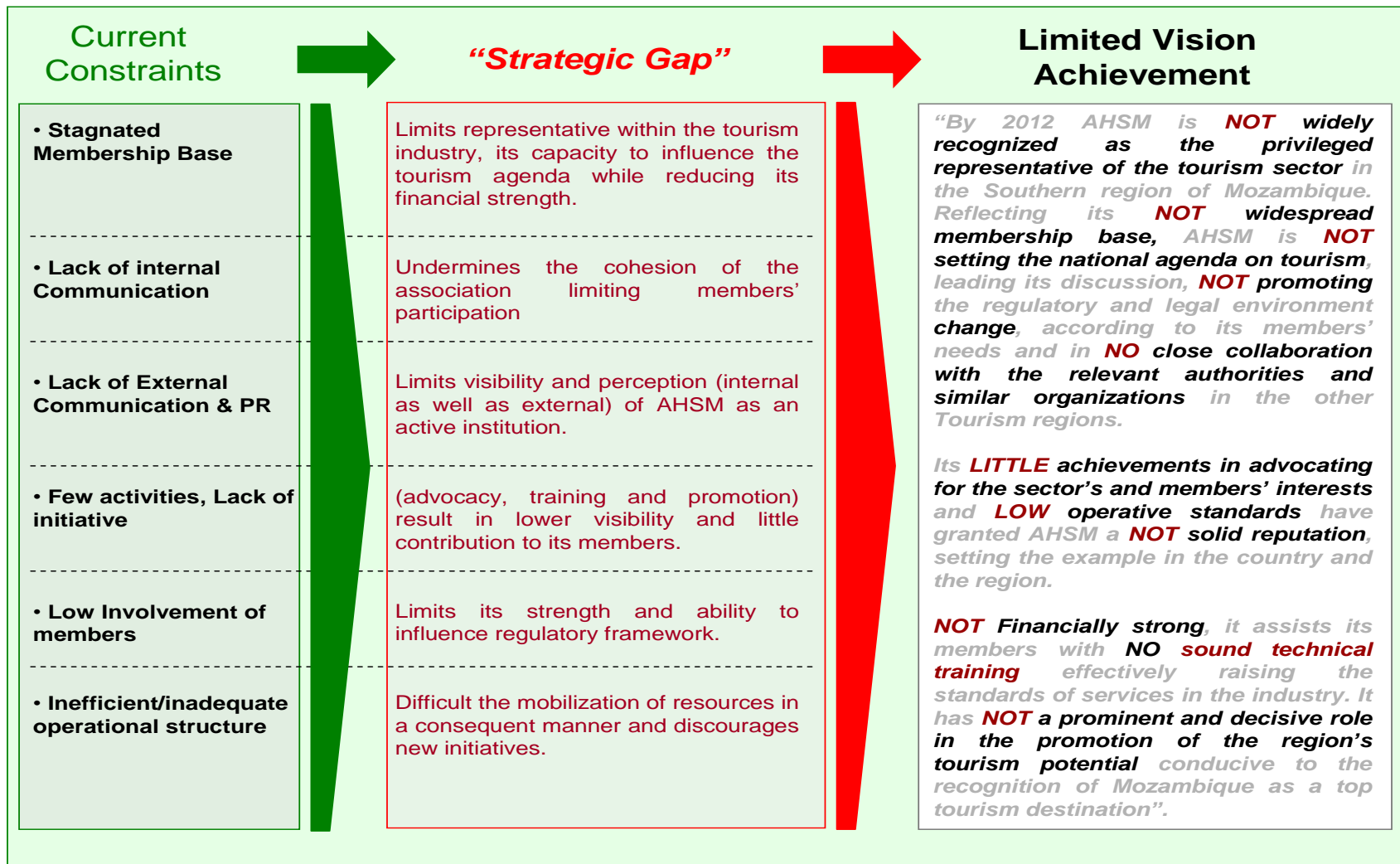
6.2 Strategic Lines

The strategy departs from a number of relevant items that set the vectors along which it will be developed. From the definition of vision and the analysis of AHSM, we identify those constraints that prevent the execution of this vision, i.e., the Strategic Gaps:



FIGURE 6

AHSM Strategic Gaps



Source: Consultant Analysis

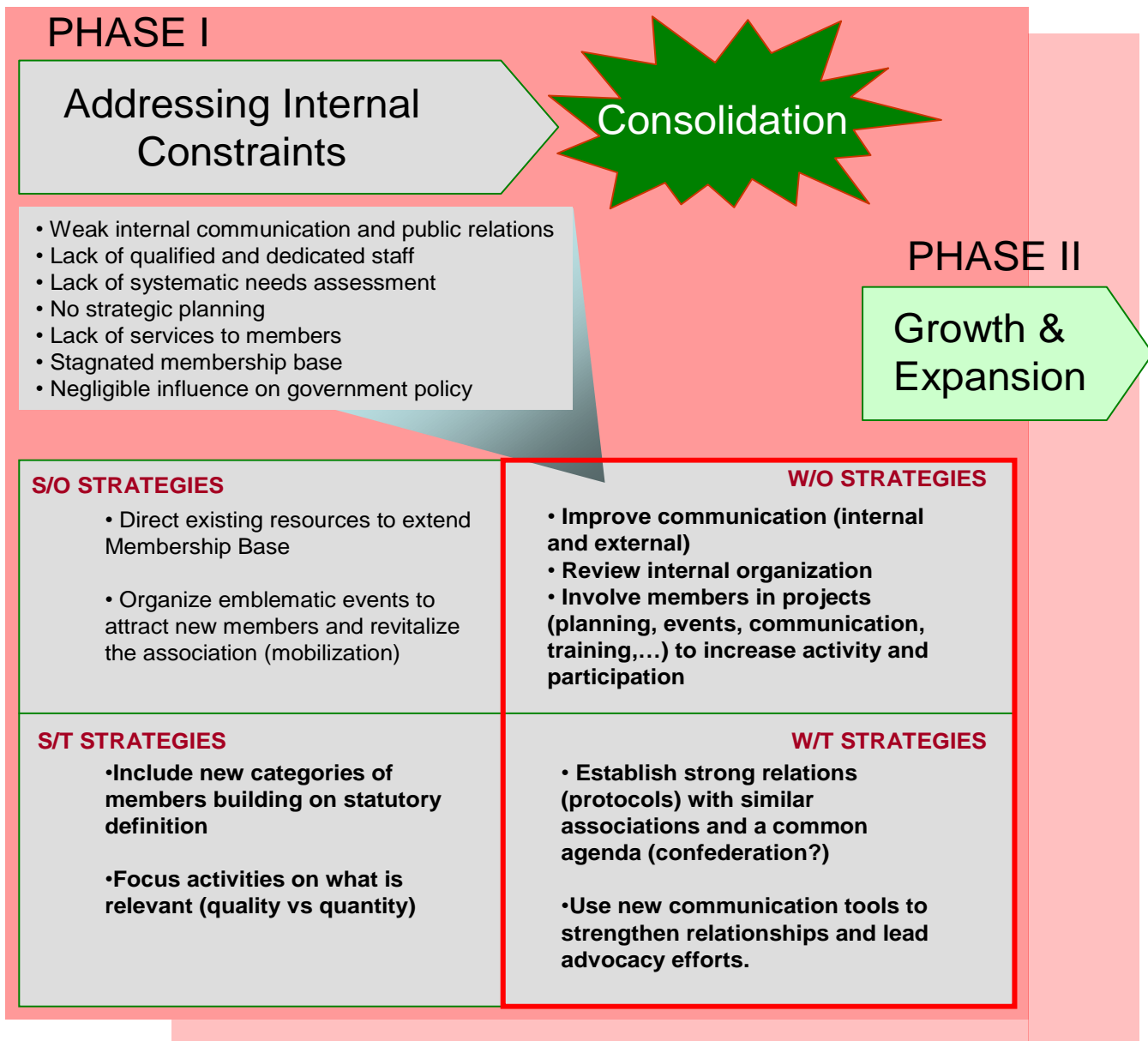


Until AHSM is able to overcome these internal constraints, it will not be able to get to a higher stage of development. Before it expands and enlarges the scope of activities, AHSM has to address these critical problems and create a solid base for further growth. These are pre-requisites for a truly development strategy.

The Strategy is then divided in two major phases:

- 1) Addressing the current constraints (to consolidate AHSM)
- 2) Growth & Expansion (to get AHSM to fully play its role)

FIGURE 7



Source: AHSM, Consultant Analysis



Although not exclusively, the crucial idea of the proposed strategy is centered in addressing internal issues implies adopting those strategic vectors more related with AHSM internal weaknesses: communication (internal), organization and members' participation. Because all issues are related, it also encompasses other relevant strategic vectors such as external communication, expanding the membership base or enlarging the provision of services.

PHASE I: Addressing current constraints

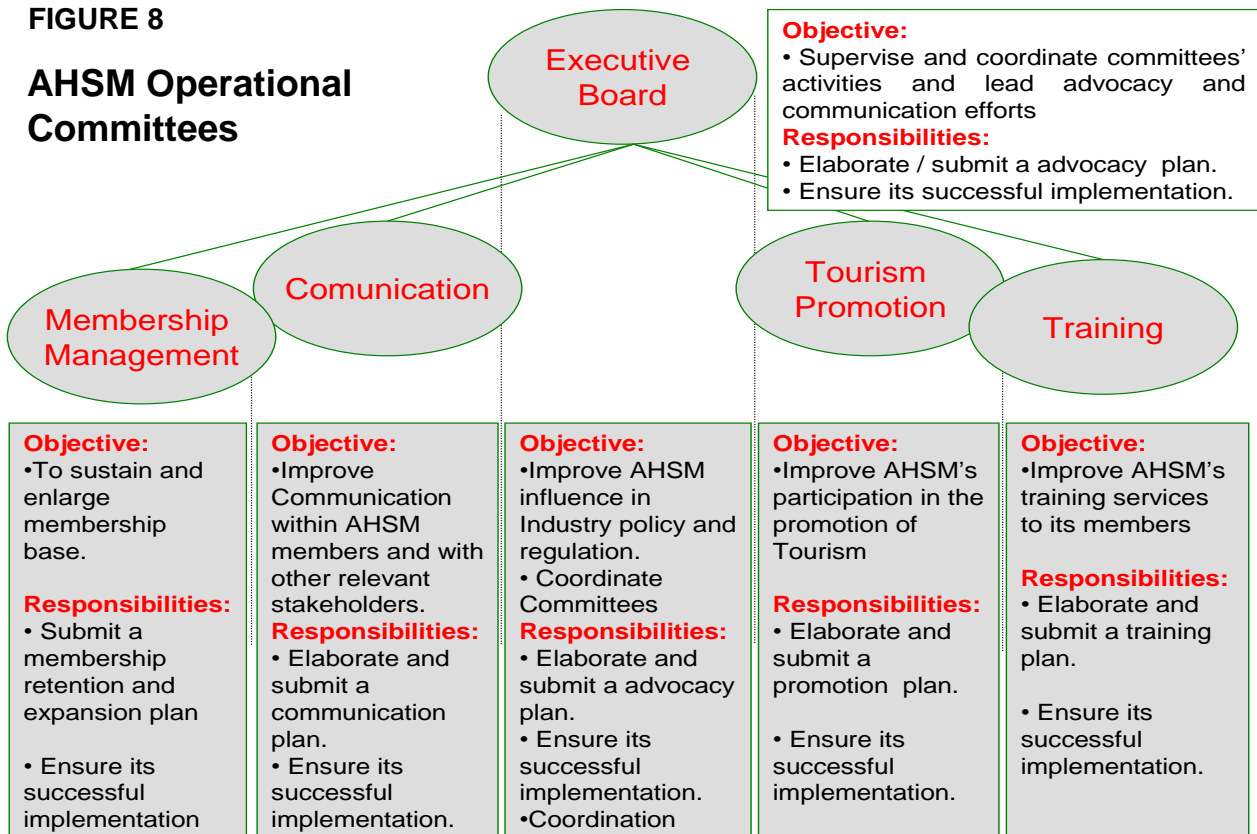
Members' Participation

Members' participation is the key factor for the success of AHSM and must be encouraged. At present most of activities are undertaken by the Executive Board members, who have to run their own hotels and take part of the board on a voluntary basis. They can realistically devote very limited time to AHSM activities. If members are not mobilized for specific tasks, there is little hope that the current constraints are successfully overcome. The whole strategic plan depends on this critical issue: or members take an active part in AHSM activities, or there will be no strategic plan that can answer AHSM problems.

The set of activities proposed for AHSM require assigning their organization to sub-committees that, in articulation with the Executive Board, should take under their responsibility the completion of each task. The following model depicts the sub-committees to be formed:

FIGURE 8

AHSM Operational Committees



Source: Consultant Analysis



Each committee will function on a voluntary base and should be nominated by the Executive Board. The overall budget should be divided by committees and specific plans should include targets for revenue generation, to some extent financially viable. Surplus revenues from some actions may be used to finance those with least revenue potential (ex: training fees or fees from new members can be used to finance the advocacy plan).

Committees are made of members. AHSM does not have the necessary resources to afford outsourcing or contracting a permanent structure to handle all the tasks. As membership expands and services offered create additional revenue, the internal permanent structure of professional staff may be reinforced leaving the committees with more supervision and less operational roles.

It is important to stress that there is no alternative to this approach and that in turn it requires members' active commitment. Although the permanent staff can be strengthened there is little room for expanding until AHSM is capable of increasing substantially its revenues.

Internal Communication

Internal communication is key to improve members' awareness of AHSM activities and initiatives, get members participation and foster cohesion.

Members' needs and wants are a part of any successful communications program and must be placed at the centre of all that is done in developing and implementing programs. The beginning of any association communication is the identified need of information and the channels through which it will be disseminated.

The upgraded AHSM web site will create a vehicle for the spreading of relevant information to AHSM members. It may be effectively used as a communication tool, with limited costs and even a source of revenues. A simple newsletter should give members updated information of activities, both at the association level and at individual members' level. These will go a long way in answering the basic question from skeptic members: why it is important to belong to the association and the value added it brings. They should convey an air of excitement and inform members and potential members the benefits of belonging. For the executive board it is an effective way of showing what they are doing and to call for mobilization.

It is interesting to realize that, although the general perception is that AHSM is not active, there are a number of initiatives currently taking place at various levels (institutional and individual):

- the board of AHSM is promoting formal links with other regional hotel associations to form a national confederation;
- a few members are participating in the definition and launching of the Mozambican Brand for tourism;
- One member is contributing to the definition of the curriculum for technical education with the ministry of Education;
- Another member has met with the National Institute of Statistics to discuss the relevant information to be gathered periodically to characterize the Tourism sector.



All the above are relevant pieces of information to be spread throughout AHSM members. They reflect the activities the association and its members prosecuting the goals of AHSM. Yet, only those directly involved are aware.

To some extent the perception that AHSM is not working does not reflect reality and results from lack of communication.

The first step of the Strategy is to create a mechanism to collect, format and distribute information relevant to the members, on AHSM activities but also on other relevant issues: members' initiatives, events, sector news.

Without any extra costs, the secretary of AHSM may be given the task of periodically request information from board members and AHSM members and format it in a simple newsletter emailed to members as well as input in the website. At a marginal cost outside services may be contracted to format the information in a more structured and appealing form.

Both the newsletter and the website can also be a source of revenues from advertising. Finding a few companies that target tourism companies can bring additional revenues for AHSM.

External Communication & PR

Most of what has been pointed for internal communication applies for the communication directed to outside parties. The media, key governmental staff, non-members tourism companies and other tourism organizations, as well as the general public, need to be informed of what AHSM is doing. Without regular communication there is no AHSM in the eyes of all outside public. "What we can not see does not exist" describes the importance of keeping a information flowing to relevant stakeholders besides the inside circle of AHSM members.

The website and the newsletter can be extremely effective ways of spreading this information to a wider public. And again, this will serve to show AHSM as an active association, creating a reputation and strengthening its image. It will also contribute to consistently and formally spreading AHSM views on issues important to the Tourism sector and, in doing that, facilitating its role as advocate for the sector's interests.

But it is not enough to rely solely on these two vehicles for external communication. We suggest three additional means of external communication:

- 1) The institutional brochure AHSM can disseminate the generic image of AHSM, describing its goals and positioning, while providing contacts and membership base. It is important to promote the association to potential members or to advertise individual members (providing their contacts). As part of this strategic plan, 1.000 institutional brochures will be printed.
- 2) The organization of an annual conference on Tourism promoted by AHSM. This conference should serve as a forum for discussion of the hot issues on tourism, evaluating its performance and generally setting the agenda. In addition to show the initiative and capacity of AHSM to lead the discussion on industry issues, such an



event would potentially attract a number of important players (namely the Government). Most importantly, it would attract media coverage and expose AHSM to a wider public, raising its profile.

- 3) In cooperation with a TV network, promote the production of a documentary series on tourism. Such a documentary made on site in various AHSM member hotels should cover both individual hotel units (serving promotional purposes), as well as providing a platform to launch the discussion of the Tourism sector. By promoting the documentary and supporting its logistics, AHSM would be able to voice its opinions of relevant issues, highlighting the importance of the sector in the economy and the need to take into account private sector's views in defining governmental policies and regulations. The wide reach of such an initiative would boost AHSM exposure and widespread its brand name.
- 4) Establish close links with media and schedule regular communications.

Given AHSM current structure and resources, we believe that all these initiatives may be done within a reasonable budget. In fact, the organization of these initiatives can be done with marginal costs as most necessary infrastructure and logistics can be provided by members.

In addition to the above initiatives, a plan of contacts with specific agendas should be proposed by members or AHSM board itself and be agreed on the general meeting. The plan should be part of the annual plan of activities submitted by the board to members and should constitute the association agenda for advocacy over the course of one year. As it is done for the monitoring of financial accounts (budget and budget control) the plan should be ratified and a final annual report submitted for approval on general meetings, stating the contacts held, goals achieved and problems faced. On yearly periods the plan is reviewed and updated. These contacts should preferentially cover:

- 1) Non-member hotels, as part of an expansion strategy towards the enlargement of the membership base and targeting selected potential new members;
- 2) Governmental departments (ex: MITUR, FUTUR,...);
- 3) Strategic partners (ex: International and regional Tourism associations, finance partners,...);
- 4) Other industry players (ex: LAM, labor unions,...).

Finally, the external communication should also address the specific issue of Tourism promotion. Because this is a stated objective of AHSM and given the fact that it requires significant planning and resources, it should be set in one specific plan. As with the annual contact plan suggested above, on an annual basis a plan of AHSM participation in promotional events (such as international tourism fairs) should be submitted to the general assembly. The plan should encompass the definition of the events to be attended, the budget proposed and the sources of funding, as well as how to effectively promote the Mozambican tourism and individual members. A specific committee should be assigned the task to coordinate efforts for participation and for its preparation.



Internal Organizational Structure

We divide the organizational structure in two distinct aspects:

1) Human Resources

Current permanent staff is limited to a secretary that supports the executive board. An executive director may be hired to increase AHSM capabilities. However, given the current level of revenues, it is obvious that hiring of a high caliber individual would absorb all financial resources. Alternatively, hiring a person less qualified would most likely create the false illusion that the association could rely on his/her work to develop the various activities. Notably, AHSM has already attempted this route with little success.

The hiring of an executive director would also take away the sense of responsibility from members. As it was referred, members' commitment is absolutely necessary in the current stage of the association and there is no alternative to it.

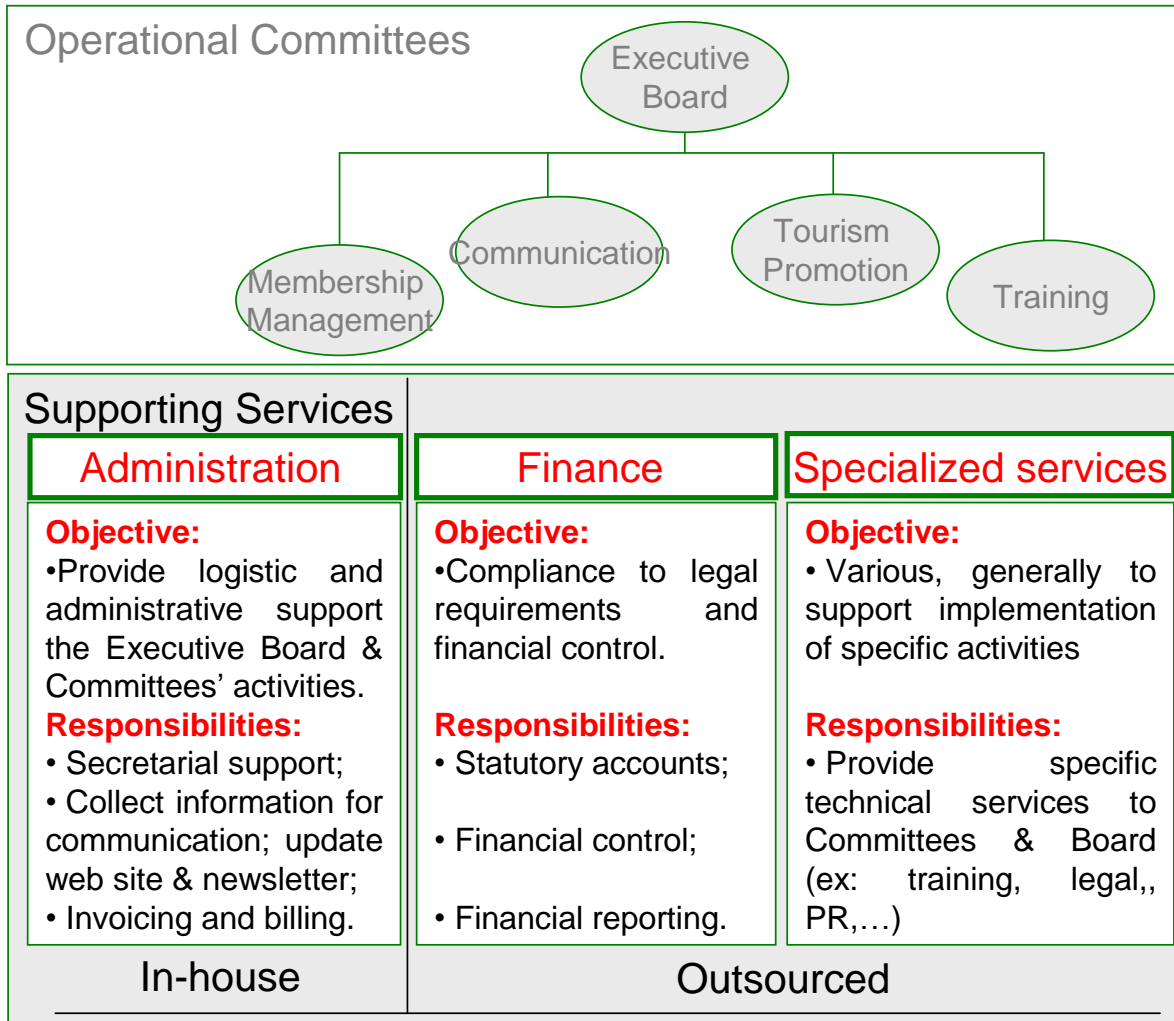
We recommend that current resources are allocated to the development of the specific plans and, on occasions, resource to specialized services on an outsourced basis, when required and feasible.

The possibility of hiring a heavier structure, an executive director and supporting staff, is dependent on AHSM's ability to generate enough revenues that can sustain such a structure. As already mentioned, the strategy plan is a dynamic tool that should be reassessed periodically according to changes that take place. If and when possible, the expansion of the permanent supporting structure may be pursued. Such a structure is the natural evolution of a BMO and may increase substantially its effectiveness.

In our model, there is the need to support the various committees and the Executive board. The main functions are: administrative support, financial control and specialized services (printing, logistics, event organization, technical consultancy, legal support, training). The following figure depict the general idea:



FIGURE 9



Source: Consultant Analysis

2) Internal Procedures

As for internal procedures, there is a great deal of opportunities to improve. We have already highlighted the importance of internal communication and suggested a number of actions for the flowing of information. Subjacent to this information flow is a procedure for gathering, assembling, formatting and spreading information.

Also, for each individual plan from task committees specific procedures have to be implemented in order for committees to be able to perform and materialize their activities. The elaboration of plans, their discussion and approval and their implementation imply the outlining of specific organizational procedures need to be drawn.

Overall management and coordination of the various committees and supporting services is performed by the Executive Board. It is also a responsibility to ensure correct procedures



are in place and followed by all parties. The celebration of contracts and protocols with third parties is also an exclusive task of the Executive Board.

Membership Base

The expansion of the membership base must be a top priority for AHSM. It serves two main purposes: 1) it increases AHSM resources (financial, Hr, etc); and 2) it increases its strength and representative role. The stagnation in membership base observed in the past three years is a good indicator of AHSM current status. However, it must be understood that AHSM should become more attractive to outside potential members if it wants to be successful in attracting them. This “low membership => low activity, low activity => low membership” is a cycle that is not easy to break. The discussion on the enlargement (Market, chapter four) has pointed out the lines for expansion of membership base, as well as the extent of the opportunity it presents. The following paragraphs outline the actions to make AHSM more attractive to new members. Simultaneously, a specific effort has to be conducted to attract new members.

Generally AHSM must identify the potential new members it wants to attract, devise a calendar for this effort and contact them directly with a clear invitation. In doing this it must be able to convince potential members of their benefits in joining AHSM. This effort would certainly be more effective if AHSM is able to materialize tangible achievements with clear benefits for its members. We suggest a number of actions that may do so.

Other Activities And Initiatives

The previous points already suggest a number of possible activities for AHSM. Left out were the training and capacity building initiatives.

AHSM has already organized a few technical courses for its members' staff. Although a number of problems were referred to by both who organized (mainly the lack of participation from members) and who participated (lack of response from organizers to participants constraints), the fact is that no one disputes the absolute need to improve the qualification of hotel staff and the role AHSM should play in this effort.

The strategy proposed includes the continuation of this initiative, although in a more structured way. A well structured training plan should be devised covering the relevant areas for training, schedule and budget requirements. Such a plan is likely to be supported by a number of donors and funding institutions. The key issue is to take into account members needs and constraints in order to effectively meet demand. A modular, short-term approach to training is most appropriate as it reduces out-of-job periods and gives the opportunity to cover a wider range of subjects, while involving more staff. Relevant technical subjects include:



FIGURE 10

Training Modules

Description	Target	Subjects	Format
Technical Areas of the Tourism Industry	Members' staff & external trainees	<ul style="list-style-type: none"> • Client Service • Reception • Public Relations & Communication • Hotel and Tourism Logistic • Hotel & Tourism Animation • Cost and Financial Accounting For Hotel Industry • Food and Beverage Management • Restaurant, Bar and Table Service • Buffet and Banket Service • Kitchen • Ground Floor Service • Hotel Maintenance • Languages 	<p>Modular courses in classroom or on-site practical, as most appropriate.</p> <p>Outside experts from consulting or training centres.</p>
MBO Management skills	Executive Board, AHSM permanent staff and Association Members' representatives	<ul style="list-style-type: none"> • Internal organization (ex Secretariat organization, Administrative systems) • Strategic Planning & partnerships (ex: Membership survey, Strategy workshop, Preparation of a business plan) • Marketing & Communication (ex: Communication concept, Internal communication, External communication) • Membership development (ex: Recruitment, Retention, Administration) • Finance Accounting practices, Membership fee administration, Income-generating services) • Lobbying & Negotiation 	<p>Modular courses or workshops.</p> <p>Experts from "sister" BMOs or other external experts.</p>

Source: Consultant Analysis



AHSM members should discuss internally the most relevant subjects and agree on an outline/schedule for the training program. Important is also to dimension the course to demand (number of trainees) according to hotels and other members' needs in order to best apply the resources.

Organizing training courses is an effective way for AHSM to reach a number of its objectives: they enhance members' performance, add value to members and contribute to the development of the industry.

Besides training a number of other activities and services may be provided by BMOs. Legal advice to members, conduct sector research and organizing thematic workshops are just a few examples. We will not discuss these. In the current strategic plan we do not propose additional services as we believe not to be realistic given the constraints and limitations of AHSM. The set of activities proposed will already mean a significant qualitative and quantitative jump from the present status and we feel that adding more activities would disperse already limited resources and create too high expectations that most likely would not be met satisfactorily.

The strategy proposed is not rigid and should be assessed periodically. If it is proven that AHSM can aim higher, adjustments should be made accordingly

PHASE II: Growth & Expansion

Once AHSM has improved the above issues, it will be in conditions to pursue a sustainable growth strategy, enlarging the number and scope of initiatives, contracting a permanent and expanding professional structure which is financially viable and sustainable.

The main focus will then be on the provision of new services to members, strengthening its leadership on setting the sector's agenda and continue to effectively influencing relevant legislation as well as promoting Mozambique's tourism sector in the international and internal markets.

In this document we focus on the initial phase of the strategy. The underlying reasoning is that AHSM has a number of critical issues to address in the short term and only when these are tackled a long term strategy may be designed. For the purpose of financial estimations we will assume a gradual increase in activities along the lines of phase 1, corresponding to a gradual increase of revenues and enlargement of the membership base. We do not devise great breakthroughs or radical changes (ex: in the set of initiatives) along the estimated period. The next few years are decisive for AHSM and realistically it will be a time for consolidation and strengthening its current position.

The key change is from a reactive organization to one that takes the initiative; from stagnation to leadership. In terms of strategic goals and plan the second phase can be resumed as "doing more and better of the same". Focus will turn from internal issues (pre-requisites) in the first year to outside and expansion in the following years.



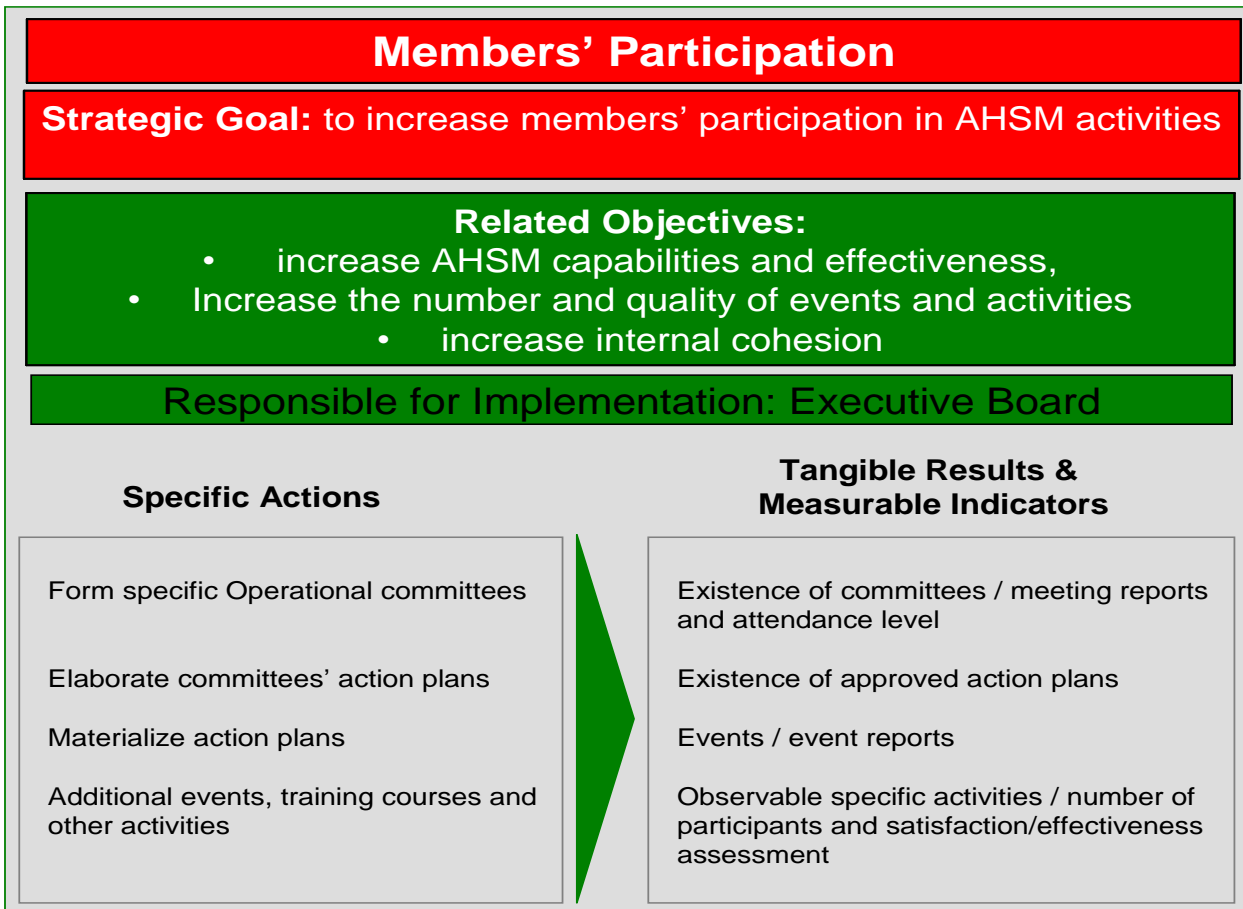
6.3 *Balanced Score Cards*

The following tables summarize the key aspects/vectors of the overall strategy: Communication, Members’ Participation, Internal Organization, Membership Base, and AHSM as a service provider and sector’s advocate (here designated as other activities, which makes sense under the approach taken of addressing the other key issues separately). The tables also link the specific objectives and proposed actions to tangible and measurable achievements. Tangible results may be further specified and quantified, which would result in a more conclusive analysis of AHSM performance within the strategy outlined. We leave them with some margin of flexibility and hope these can be better defined under the implementation plan that follows.

We mean to summarize the overall strategy in a pragmatic and simple way. Rather than creating a complex system we focus in the few critical aspects – objectives, actions and tangible results - that are most relevant for the association. In doing so we expect to create a clear picture of the way forward for AHSM.

Within AHSM specific committees are designated for the prosecution of each strategic vector. Advocacy and external representation, as per AHSM statutes, are a key function of the Executive Board.

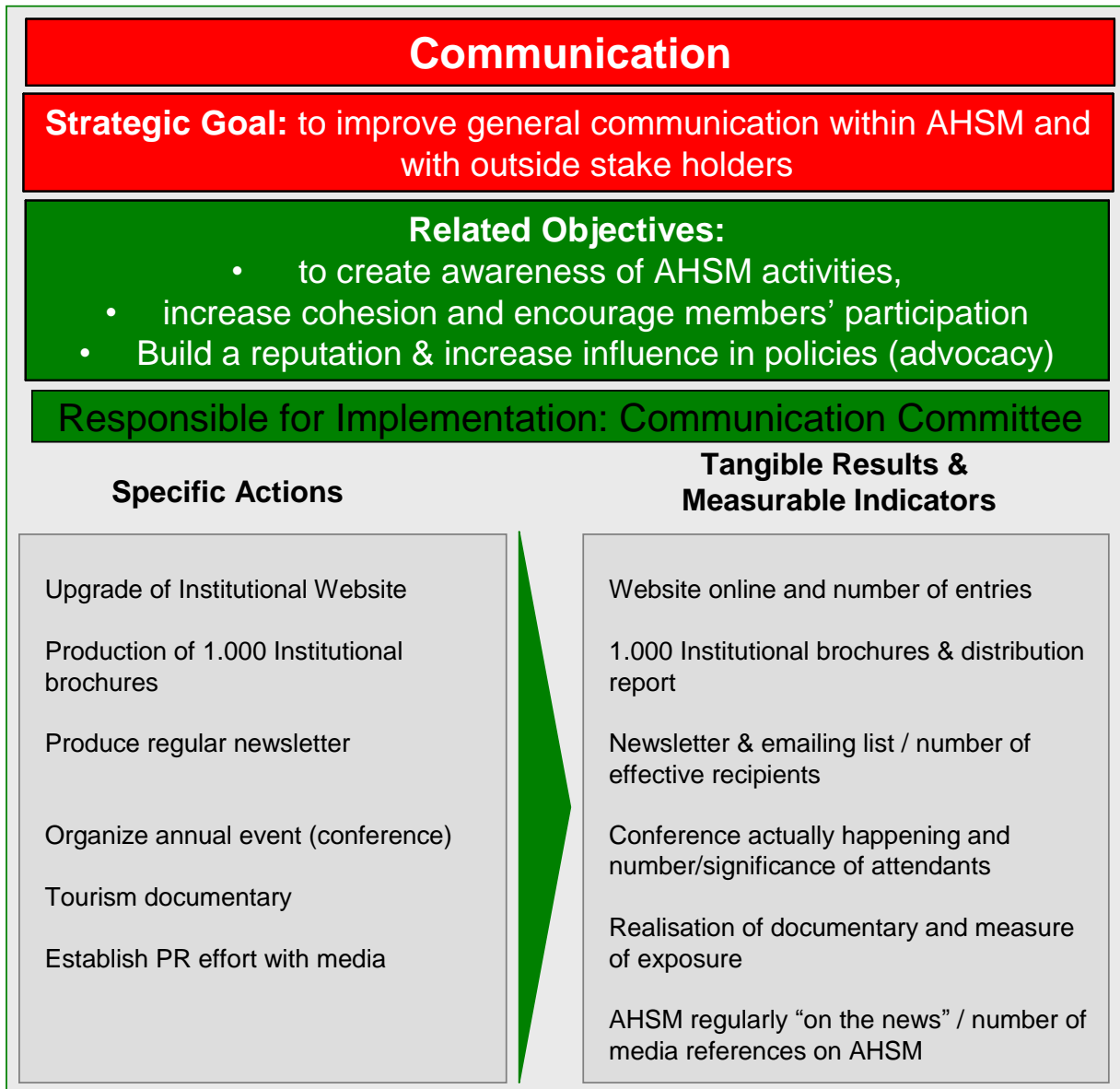
FIGURE 11



Source: Consultant Analysis



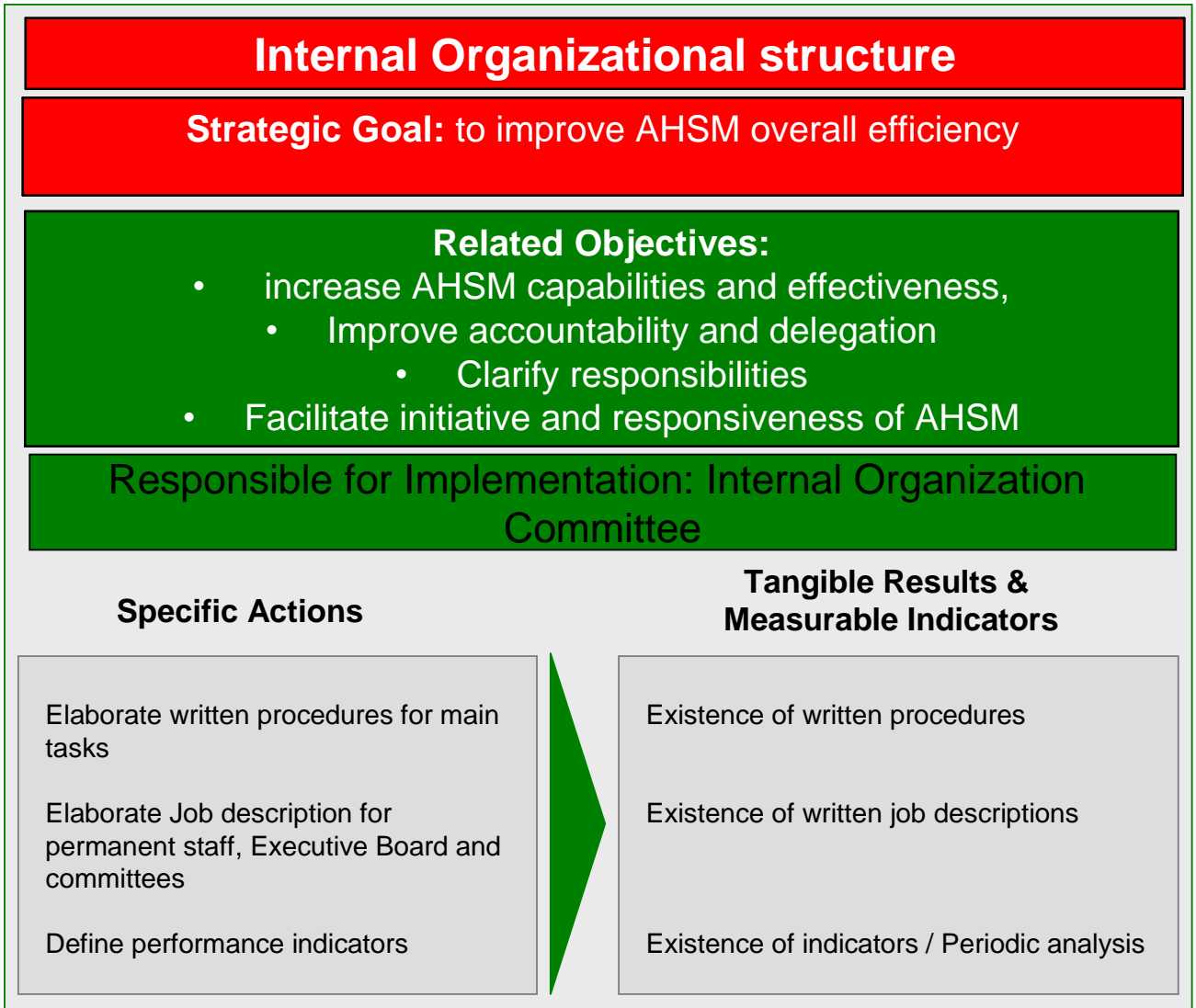
FIGURE 12



Source: Consultant Analysis



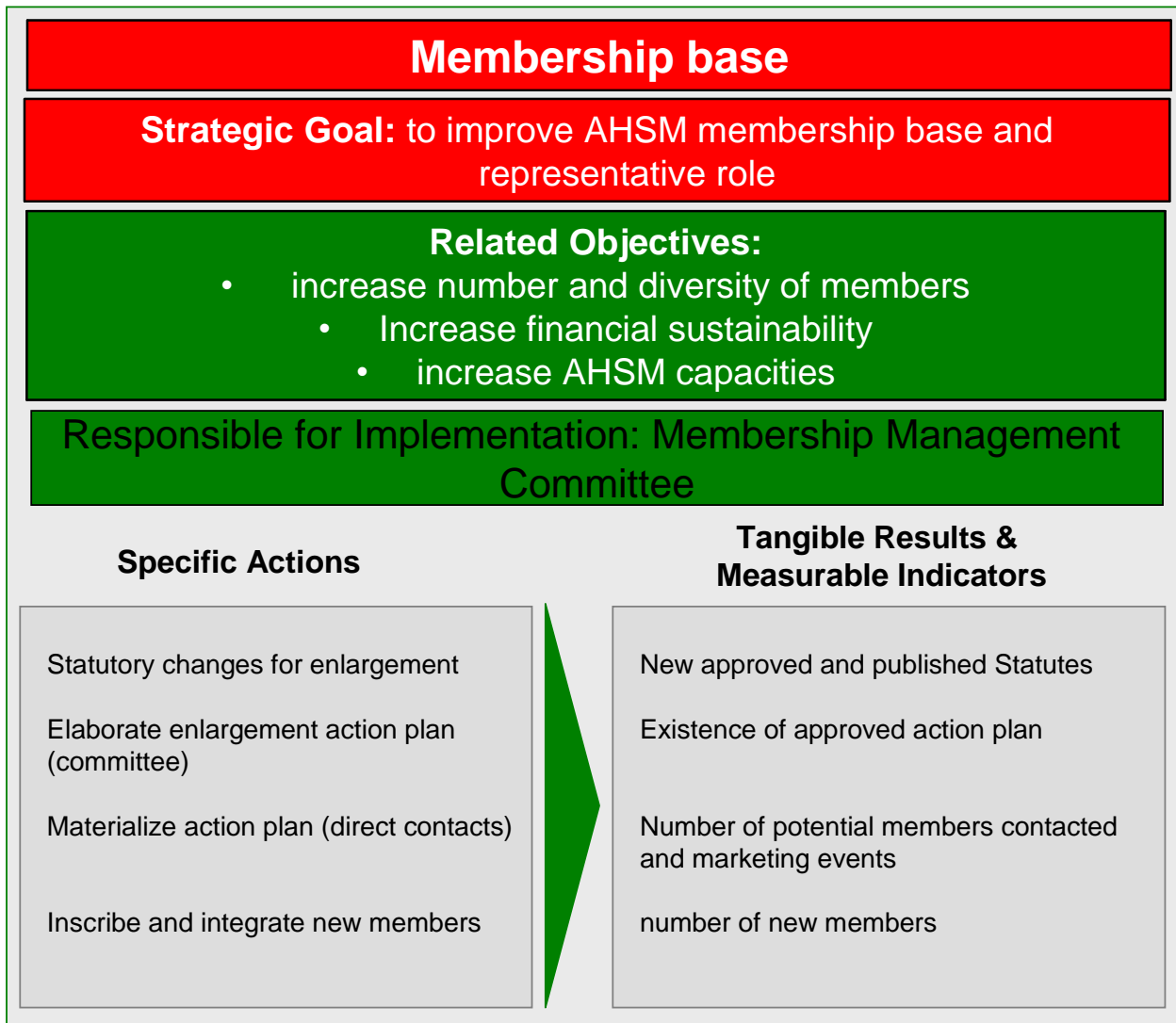
FIGURE 13



Source: Consultant Analysis



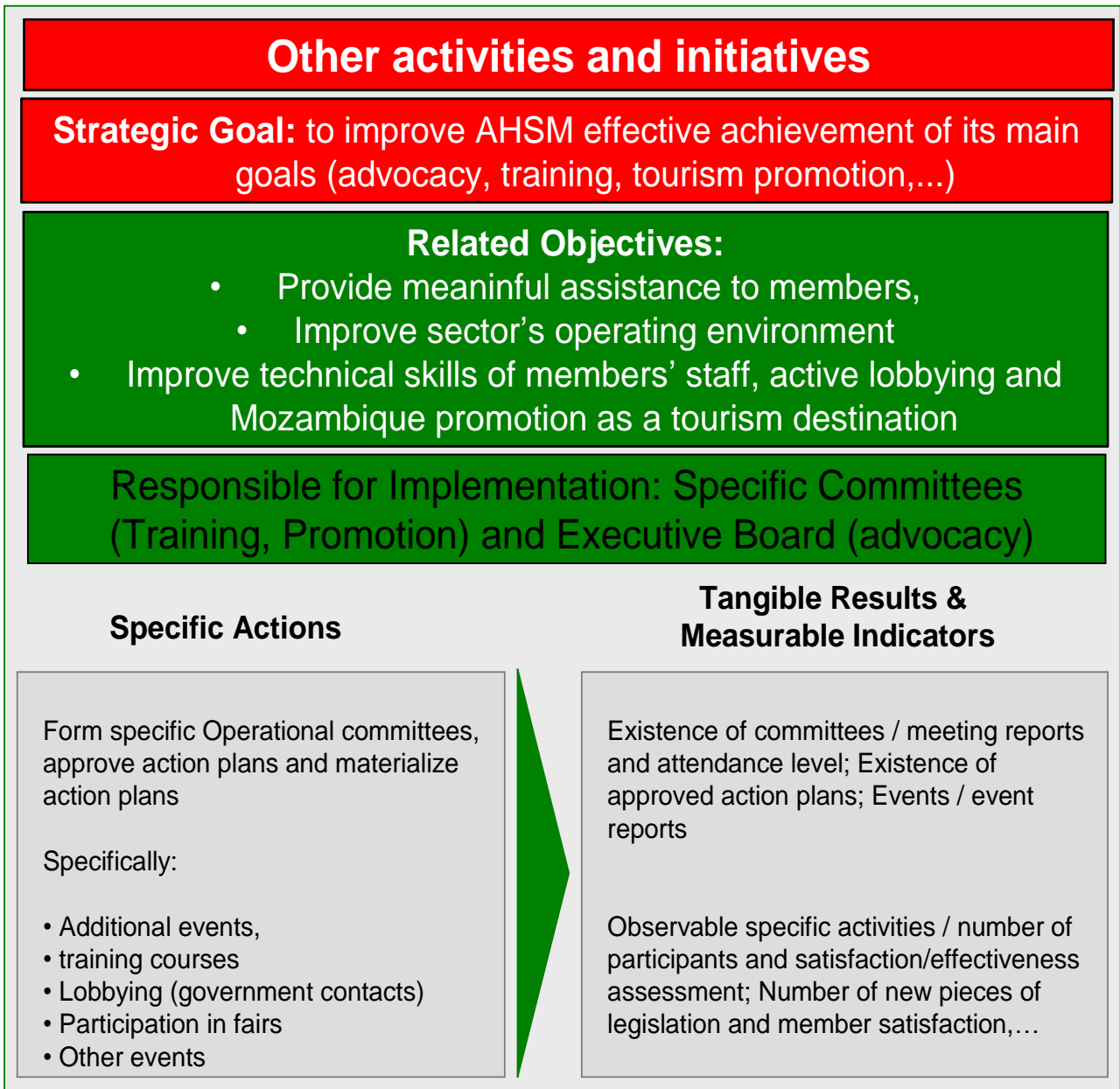
FIGURE 14



Source: Consultant Analysis



FIGURE 15



Source: Consultant Analysis



6.4 Summary of Strategy Recommendations

Following the revision of AHSM positioning, adjusting it to allow for new members categories and stating a clearer vision for AHSM, the strategy outlined defines two phases:

- 1) Addressing Internal Constraints
- 2) Growth And Development.

The first Phase is a critical one for AHSM. Without correcting current problems AHSM will have serious difficulties in pursuing its objectives in an effective manner. Most of the recommendations target the specific current constraints identified. A number of strategic vectors and strategy recommendations are enunciated:

- 1) Membership Participation, as an absolutely crucial factor to enhance AHSM effectiveness. The strategy outlined deliberately omits the hiring of a General Director as we believe that this step would not contribute to tackling the real problem which is lack of involvement of members. At a later stage, when AHSM increases its level of activity is likely that such a solution should be evaluated and implemented. But only after a new attitude of participation is achieved.
- 2) Communication, both internal and external as a mean to create general awareness to AHSM and encourage members' participation.
- 3) Internal Organizational Structure adjustment and clarification in order to improve accountability and effectiveness.
- 4) Membership Base enlargement and management as a source of increased representation and strength as well as a source of additional resources.
- 5) Initiatives and Activities as the path for AHSM to reach its stated goals in a consistent and focused manner, concentrating its resources in those activities that clearly add value to its members.

The sequence and organization of the strategic vectors intends to highlight the main priorities for AHSM and suggest a clear course of action. In the following chapters we further detail the form in which the strategy may be implemented, defining the implementation plan and evaluating the financial implications of that plan for AHSM.



7 IMPLEMENTATION PLAN

In the previous chapter we identified the cumber stones of the strategy for AHSM. We discussed their importance in addressing the specific current limitations of the association in the context of the Tourism industry in Mozambique. Finally, for each strategic line we defined the relevant measurable indicators to assess the performance, i.e., the effectiveness in pursuing the strategy.

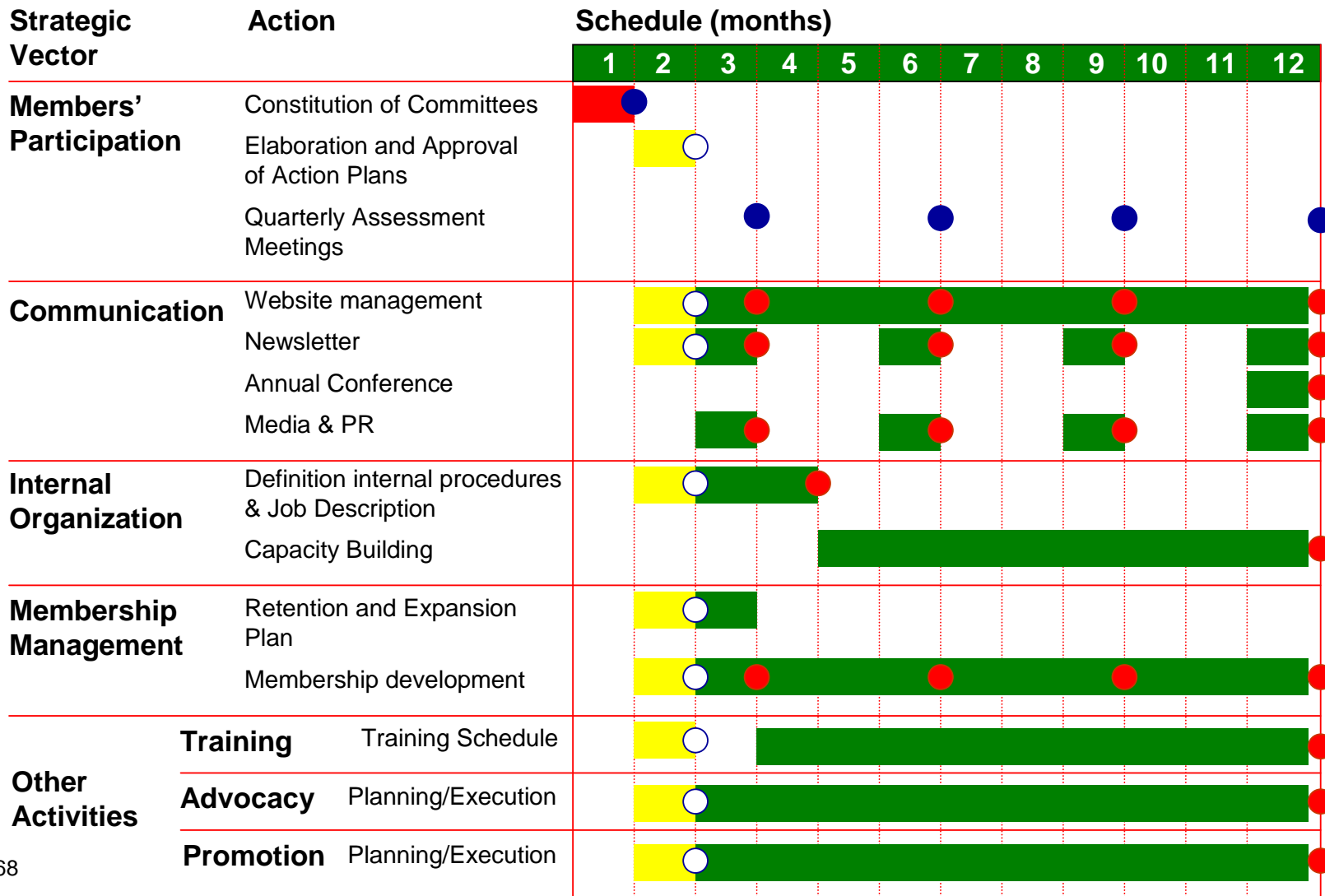
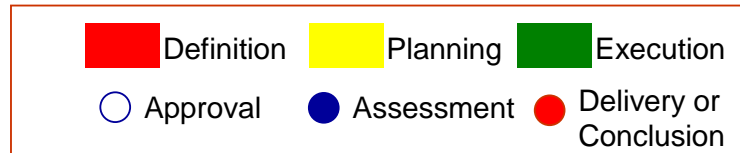
We turn now to the implementation plan. In the following paragraphs we present the set of actions that materialize the strategy outlined. Each part of the plan is geared to a specific strategic vector, all of them contributing to the overall goal of making AHSM a consistent and effective association.

As previously mentioned, the most important and first part of the strategy is focused on overcoming internal pitfalls. The following picture illustrates the Action Plan for the first year:



FIGURE 16

**ACTION PLAN:
Strategy Implementation (year I)**





7.1 Members' Participation

During the first month the various committees are constituted. These committees will then prepare their specific plans which should then be submitted to the executive board for discussion and approval. Following this step, each committee will then implement its plan. These committees reflect the Members' Participation vector of the strategy. Its articulation should be stimulated and managed by the Executive Board which plays a pivotal and decisive role in ensuring this effectively happens. For this purpose, quarterly assessment meetings with the individual committees and the Executive Board are scheduled.

Although the plan shows the different committees working in parallel, a number of areas will overlap or be closely related. The Executive Board should ensure the coordination of the various committees in order to promote synergies, maximize effectiveness and prevent these overlaps.

The Action Plan proposed already points a number of activities for each committee. This initial suggestion may then be adjusted according to the committees' and the executive board appreciation of their roles, objectives and capabilities. The extent to which some actions may take (ex: training) depends on the resources AHSM is able to source.

7.2 Communication

The communication plan already describes the activities to be performed. The website maintenance is important to keep the tool effective, updating information/contents, attracting advertising. This is an ongoing process although a quarterly overall update is advisable. This can be mostly done in-house, relying on secretariat support and eventually the contracting of an external IT company for the introduction of the information or changes in the site structure.

The newsletter also requires some work in gathering and formatting the information as well as ensuring it is timely sent to its target. It can be done quite easily and it does not need to be too sophisticated to achieve its goal. It is an extremely effective way for the Executive Board to inform on its activities and mobilize AHSM members.

The organization of the annual conference is probably the most time consuming if it is to achieve a good level of visibility and a fair number of relevant participants. It has the potential to attract media attention and exposure. The Media & PR plan may require the assistance of specialized services. A specific budget should be made for this event. Given that within its members AHSM may secure most of the required logistics, it may be done at a marginal cost.

In all the above an efficient secretariat support is required.

7.3 Internal Organization

The internal organization action plan encompasses 1) the definition of clear internal procedures and supporting systems for the basic processes within AHSM (ex: fee processing, communication to members, members' data management,...) and the written



definition of job descriptions and 2) the training of permanent staff in order to be able to perform the required tasks. From the definition of procedures and the job description a number of skill gaps will be identified and training should be defined accordingly. For the actual training schedule or the skills required fall into the more general training schedule for AHSM (in which case permanent staff can attend the relevant modules) or it doesn't (in which case specific courses should be identified for the permanent staff).

Given the lean structure, at this stage a few simple procedures need to be set, in particular the articulation with the Committees and the relation/communication with members. Most of the procedures involve AHSM secretariat and should be designed to help clearing his/her job description and encourage performance.

7.4 Membership Management

Marketing and awareness campaigns need to be conducted on a regular basis. The plan should design the campaign and assign responsibilities. Existing members need to be cared for intensively in order to give them a sense of ownership and allow for their participation. Satisfaction surveys that evaluate the BMO's performance or creating a hotline for complaints and inquiries is another instrument for enhancing members' confidence.

Membership administration will be much easier with a comprehensive and up-to-date list of members. A simple electronic general-purpose database systems tailored to the specific needs may be developed. Such an electronic information system can also be used to upgrade other services (ex: for the promotion of activities or mobilization of members).

7.5 Training

Training is divided in two building blocks:

1) Technical Areas of the Tourism Industry

We suggest a number of relevant themes for training. We also suggest a modular approach to the course to minimize disrupting the operations while staff is attending training. If well planned and properly advertised, these courses can be extended to a significant number of members' staff, up to a few hundreds. It is critical that these are perceived to be of quality and to have a real impact. In annex we describe in more detail the courses, their contents and goals. In annex there is detailed outline of the courses (objectives, attendants, methodology and course contents).

2) MBO Management and development skills

This training is directed to AHSM members and permanent staff. The skills to be developed are directly related with AHSM management and functioning. These should take the form of workshops with external consultants or experts from other BMOs facilitating. Also in the training annex we suggest two courses (Finance and Communication). Other courses may be organized covering specific relevant themes. Ultimately they will not only enhance



members' ability to contribute to AHSM development, they will also foster team building and the sense of belonging to a organization with common goals.

7.6 Advocacy

Advocacy, as the external representation of the AHSM, is primarily a function of the Executive Board. To some extent, the participation of AHSM in the consultation mechanisms of CTA, is already an important way to influence the policies relevant to the Tourism sector. Nevertheless, given its national scope and the high level of the issues in the CTA agenda, there is room for further action and participation (ex: at regional level or even by extending the issues covered in the CTA agenda). Through its effort, AHSM may even bring more attention to these general issues in its own forums and through its own initiative.

The Advocacy effort starts with the setting of a clear agenda. The initiatives such as the annual conference or the TV documentary (as well as the support of the website and newsletter as communication vehicles) are all good opportunities to voice the members' concerns and bring them into the governmental and broad society agendas.



8 FINANCIAL PLAN

The materialization of the activities proposed in the strategy will require additional resources on top of the current revenues. The ability of AHSM to enhance its membership base in order to increase its revenues is crucial as it is the ability to attract alternative funding.

In an initial phase some of the costs may be financed to some extent by cooperation agencies. This will require an active executive board to promote the committees action plans to these agencies. But gradually AHSM must aim at a complete sustainability. Advertising, Sponsoring or participation fees are examples of alternatives that should be explored as its initiatives gain recognition and get to a wider public.

8.1 Financial Requirements (Expenditures)

In the Financial Model, we based the costs of AHSM in its previous budgets, allowing for a 20% yearly increase to accommodate for the additional activities. We estimate allocating 30.000 USD to the current structure. To these structural costs we add on the forecasted expenditures in the various activities suggested in the Action Plan.

The following table depicts the costs for the different activities for the period June 2007 / June 2008:



Table 11 - Event

EVENT			
Course Module	Duration (h)	Cost	Período
Technical courses for Members' staff			
● Client Service	24	3,000	Sep/07
● Reception	24	3,000	Sep/07
● Public Relations & Communication	24	3,000	Oct/07
● Hotel and Tourism Logistic	24	3,000	Oct/07
● Hotel & Tourism Animation	24	3,000	Nov/07
● Cost and Financial	24	3,000	Nov/07
● Accounting For Hotel Industry	24	3,000	Dec/08
● Food and Beverage Management	24	3,000	Dec/08
● Restaurant, Bar and Table Service	24	3,000	Jan/08
● Buffet and Barket Service	24	3,000	Jan/08
● Kitchen	24	3,000	Feb/08
● Ground Floor Service	24	3,000	Feb/08
● Hotel Maintenance	24	3,000	Mar/08
● Languages	24	3,000	Mar/08
MBO Development			
● Membership development	20	3,000	Apr/08
● Marketing & Communication	20	3,000	Apr/08
● Internal organization	20	3,000	May/08
● Finance for MBOs	20	3,000	May/08
Preparação e Implementação de Plano de	80	10,000	2007/2008
Total	496	64,000	
Annual Conference			
● Organization	100	5,000	Mar/08
● Promotion	100	5,000	Mar/08
● Logistics	25	2,500	Mar/08
Total	225	12,500	
Documentary			
● Organization	200	10,000	Mar/08
● Logistics	25	2,500	Mar/08
Total	225	12,500	
Website Maintenance			
● Organization	NA	2,000	2007/2008
Total	0	2,000	
Newsletter			
● Organization	NA	1,200	2007/2008
Total	0	1,200	
Promotion			
● Organization	200	10,000	2007/2008
Total	200	10,000	
Internal Organization			
● Procedures & Job Description	20	2,000	2007/2008
● Hardware, Software & Training	20	3,000	2007/2008
Total	40	5,000	
Membership Management			
● Organization	20	2,000	2007/2008
● Expenditures	20	3,000	2007/2008
Total	40	5,000	
TOTAL		112,200	

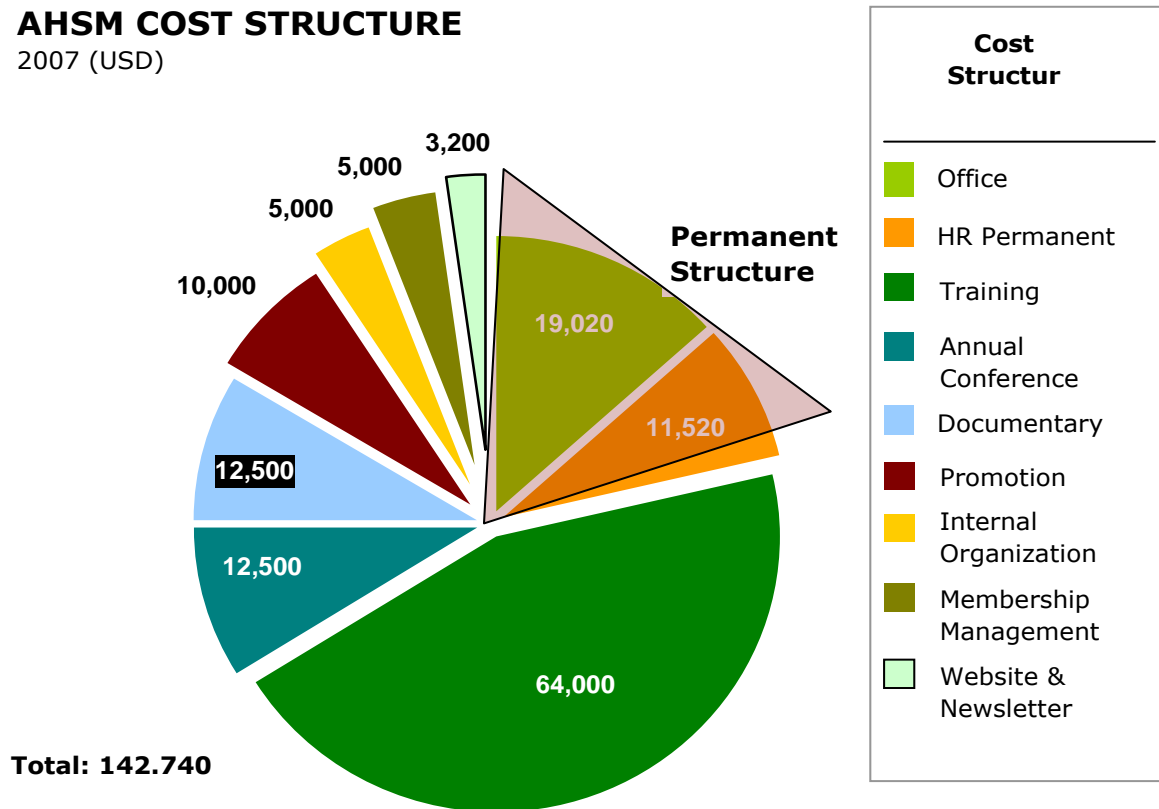


The following graphic illustrates AHSM future cost structure. While office /structure costs amount to 30.000 USD (or 21% of total operational costs), the larger share of the costs will directly linked to AHSM activities. Training accounts for 45% of yearly costs. 10% will be allocated to improve the internal organization, membership management and to maintain the communication vehicles (website and the newsletter). The remainder 24% will be allocated to the organization of the annual conference, the TV documentary and the promotion effort.

GRAPHIC 10

AHSM COST STRUCTURE

2007 (USD)



The cost structure proposed is significantly higher than the current AHSM revenues. Therefore it will only be viable if AHSM is able to significantly increase its revenues.

8.2 Revenues

The necessary resources will be drawn from:

- 1) an increase in paying members (joining and monthly fees), which will still remain the major income source of the association, combined with
- 2) training fees, which will gradually finance the whole cost of the courses (from a 25% coverage in the first year up to 100% in the fourth year),
- 3) advertising, using the website and the newsletter as the vehicles for third party adds, and



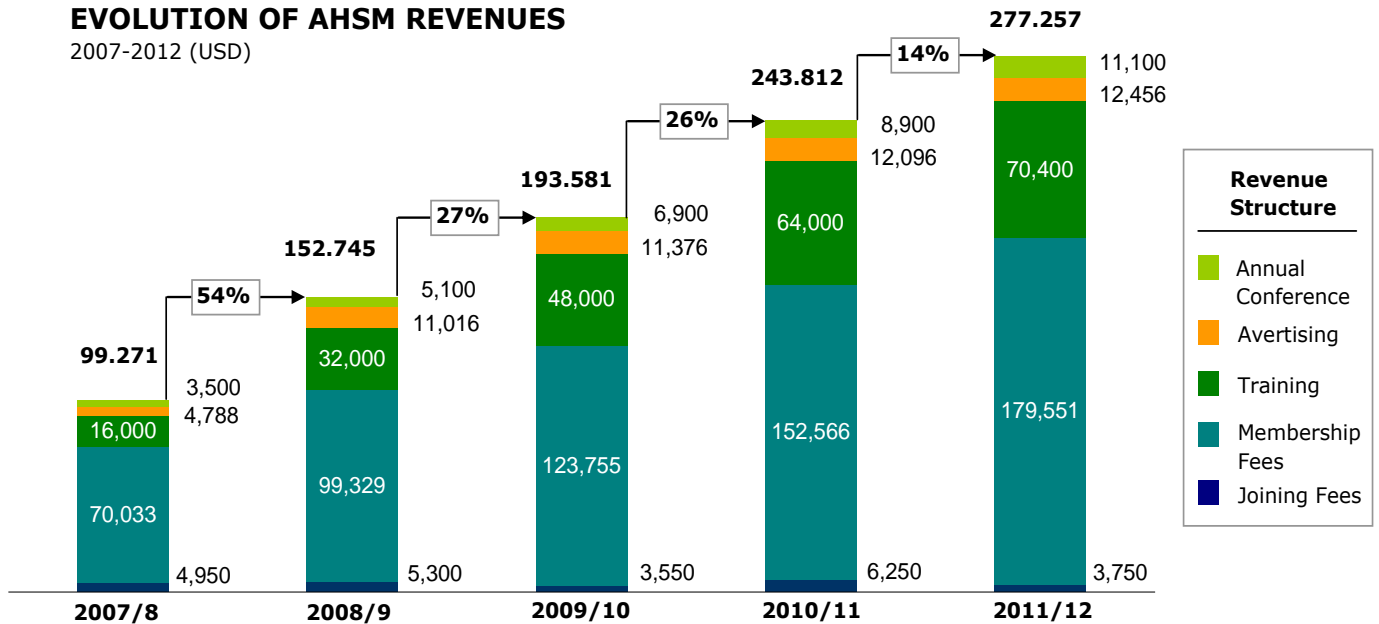
4) the revenues generated by the annual conference

In the following graphic we illustrate the evolution of AHSM revenues for the period, discriminating each source:

GRAPHIC 11

EVOLUTION OF AHSM REVENUES

2007-2012 (USD)



It is important to observe that a number of initiatives (ex: training, the annual conference, website,...) start as negative net contributors to AHSM financial situation. Gradually, these activities will become self sustainable and even cash generators. By the year 2012, these initiatives not only pay for their costs, they actually generate a surplus that can be used for developing AHSM services to its members.

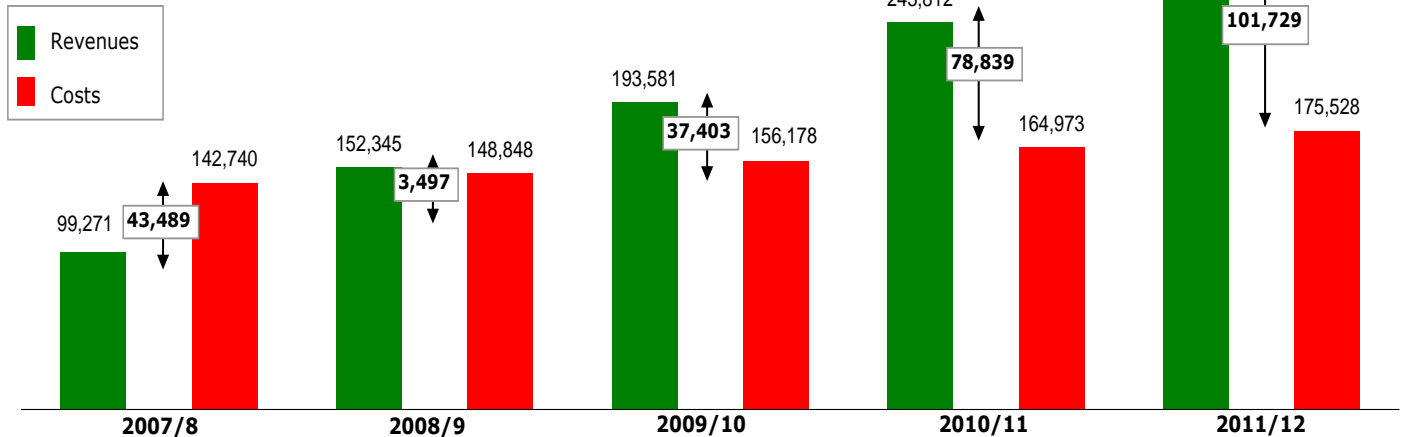
The following graphics compare the evolution of Costs and Revenues along the period. The first year revenues will fall short of costs by nearly 44.000 USD. At its peak, AHSM will require nearly 45.000 USD to fully implement the activities defined in the action plan.



GRAPHIC 12

Costs vs Revenues for AHSM

2007-2012 (USD)

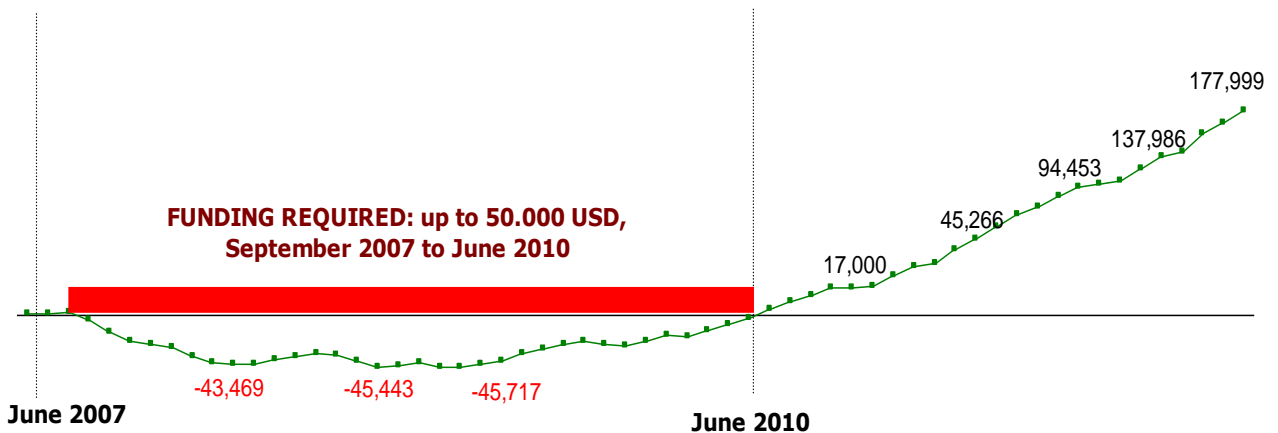


In the following graphic we illustrate the additional funding (amount and period) that AHSM will need to raise to cover for its costs.

GRAPHIC 13

CUMULATIVE CASH FLOW

2007-2012 (USD)



The necessary resources may be drawn from a number of sources, preferably from donor and cooperation agencies to limit the possible liabilities for AHSM. It is our understanding that AHSM has a number of important characteristics that will allow for approaching various agencies for this funding. With a well structured plan, understanding that this help will be temporary and that AHSM will become self sustainable in the medium term (three years), a “bridge finance” type of financial contribution allows for the establishment of a strong AHSM, capable of taking its position as a privileged representative of the Tourism industry.



One area where AHSM may use effectively to raise its additional finance is training. There are various agencies with specific funding programs specifically conceived for technical assistance and capacity building that AHSM should approach. In annex 2 we expand on what could be a training program for AHSM to present to such agencies in order to raise these funds.

Ultimately it will be the enlarged membership base that will guarantee a stable stream of cash flow to sustain AHSM, be it directly through the fees or through their active contribution to the various initiatives outlined in the action plan.

By the year 2010, AHSM will be generating enough income to become viable. During the period between 2007 to 2010, AHSM will have solidified its capability to deliver value added initiatives:

- 1) its training is recognized as value for money within the industry
- 2) the annual conference attracts media attention and a reasonable number of participants,
- 3) the website and the newsletter are preferred vehicle for knowing what is happening in the Tourism industry in Mozambique.

Most important, the renewed image of AHSM has attracted a fair number of new members, giving it the financial and representative strength.



9 FINAL REMARKS

Most of what has been discussed in the previous chapters results from the contributions of those AHSM members that participated in the process of devising a new strategy for the association.

The following resumes the key points of this strategy:

The participation of members in AHSM is life is paramount to its development. Over the discussion we stress this point as without this pre-requisite this strategy outlined – or any other – will hardly be feasible.

Given the current problems faced by AHSM the strategy outlined may be considered ambitious. The required resources, both financial and in terms of increase in activities / members' participation, are not easily raised. It will be extremely important that the Executive Board focuses its efforts on the few strategic lines proposed, serving as a factor of motivation and encouragement for other members to get involved. For the operational structure based on Committees to be implemented, a constant effort of supervision, coordination and coaching is required. Underlying the strategy is the conviction that here is really no option to this commitment if AHSM is to develop and evolve to a higher stage.

Concentrating AHSM geographic implantation in the Southern provinces reinforces the conception of the association initially devised by founding members. Opening the association to new categories of members enlarges the potential membership base and guarantees its sustainability and growth.

The second phase (years 2 and following) is subjected to the degree of success achieved in the first year. At the end of this first year, AHSM should reassess its current status against the targets and plans set and adjust the strategy accordingly. There may be a need for prolonging the first phase until AHSM has surpassed its internal constraints and is able to consolidate.

Overall and given the expected growth of the tourism sector and its increasing importance for Mozambique, there is definitely the room as well as the need for a strong and active AHSM. It is a challenge that AHSM should face with optimism and renewed energies. Its members, current and future, will clearly benefit from a strong AHSM as will the country itself.



10 ANNEXES

10.1. ANNEX 1 – Financial Projections

- a) Revenues Assumptions
- b) General Financial Assumptions
- c) Revenues
- d) Costs (activities)
- e) Yearly Balance Sheet
- f) Yearly Income Statement
- g) Yearly Working Capital

10.2. ANNEX 2 – Training modules

10.3. ANNEX 3 - WEB Site

10.4. ANNEX 4 - Brochure

10.5. ANNEX 5 - Membership Form

10.6. ANNEX 6 – Statutes

10.7. ANNEX 7 - References



10.1. ANNEX 1 – Financial Projections

a) Revenues Assumptions

	2007	2008	2009	2010	2011	2012
Revenues (USD)						
MEMBERS' FEES:						
Individuals (non-voting)						
# of Members	1	25	50	75	100	125
Joining Fee	50	50	50	50	50	50
Average Mebership Fee	10	10	10	15	20	25
% non paying	10%	10%	10%	10%	10%	10%
Associated Member (non-voting)						
# of Members	1	3	5	7	10	13
Joining Fee	250	250	250	250	250	250
Average Mebership Fee	100	100	100	100	100	100
% non paying	5%	5%	5%	5%	5%	5%
Effective Member - Restaurant & Other						
# of Members	5	10	15	20	25	30
Joining Fee	250	250	250	250	250	250
Average Mebership Fee	100	100	100	100	100	100
% non paying	5%	5%	5%	5%	5%	5%
Effective Member - Hotels & Lodges						
# of Members	24	29	35	42	50	50
Joining Fee	250	250	250	300	350	400
Average Mebership Fee	200	200	200	200	200	200
% non paying	5%	5%	5%	5%	5%	5%
OTHER REVENUES:						
Training						
Number of attendants per Module	20	25	30	30	30	30
% of cost recovered from fees	25%	50%	75%	100%	110%	120%
Fee per attendant	38	75	113	150	165	180
Advertising						
WEB SITE Monthly revenue	300	720	750	780	810	840
Number of advertisers	3	6	6	6	6	6
Individual advertise expenditure	100	120	125	130	135	140
NEWS LETTER Monthly revented	99	198	198	198	198	198
Number of advertisers	3	6	6	6	6	6
Individual advertise expenditure	33	33	33	33	33	33
Annual Conference						
Participation Fee	2,500	3,600	4,900	6,400	8,100	10,000
Number of attendants	50	60	70	80	90	100
Fee	50	60	70	80	90	100
Sponsors and Advertisers	1,000	1,500	2,000	2,500	3,000	3,500



b) General Financial Assumptions

General Assumptions

Initial Date	Jun/07
Depreciation Period (years)	5
% reinvestment	100%

Taxes

VAT	17%
IRPC	32%

Working Capital

Assets		Liabilities	
Receivables	15 days	Suppliers	20 days
Inventory	15 days		

Financial Assumptions

Minimum Balance	\$	1,000
Initial Funding	\$	-
Discount Rate		15%

Debt Management

	Debt 01	Debt 02
Principal (USD)	\$ -	\$ -
Interest Rate (% yearly)	22.0%	8.5%
Interest Rate (% monthly)	1.67%	0.68%
Initial Date	Feb-07	May-07
Grace Period - Interest (months)	-	-
Grace Period - Interest Payment (months)	12	12
Grace Period - Principal (months)	12	12
# Payments	36	36

Overdraft Interest Rate

	1.0%
--	------

Exchange Rate

MTN/USD	26.50
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c) Revenues

REVENUES (USD)	Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	
# of Associates																						
Individual (Non-voting)	1	1	2	2	3	4	5	7	9	11	15	19	25	26	28	30	31	33	35	37	40	
Associate	1	1	1	1	1	2	2	2	2	2	2	3	3	3	3	3	4	4	4	4	4	
Effective - Restaurant & Other	1	1	1	2	2	3	3	4	5	6	7	8	10	10	11	11	11	12	12	13	13	
Effective - Hotel & Lodge	24	24	25	25	26	26	26	27	27	28	28	29	29	29	30	30	31	31	32	32	33	
Revenues																						
Joining Fees	550	-	300	250	300	550	50	600	350	600	450	950	800	50	600	100	550	350	350	350	400	
Individual (Non-voting)	50	-	50	-	50	50	50	100	100	100	200	200	300	50	100	100	50	100	100	100	150	
Associate	250	-	-	-	-	250	-	-	-	-	-	250	-	-	-	-	250	-	-	-	-	
Effective - Restaurant & Other	250	-	-	250	-	250	-	250	250	250	250	250	500	-	250	-	-	250	-	250	-	
Effective - Hotel & Lodge	-	-	250	-	250	-	-	250	-	250	-	250	-	-	250	-	250	-	250	-	250	
Membership Fees	5,010	5,120	5,238	5,364	5,501	5,651	5,816	5,999	6,203	6,434	6,697	7,000	7,350	7,504	7,662	7,824	7,991	8,162	8,337	8,518	8,704	
Individual (Non-voting)	10	13	17	22	29	38	50	65	85	112	146	191	250	265	281	297	315	334	354	375	397	
Associate	100	110	120	132	144	158	173	190	208	228	250	274	300	313	327	341	356	371	387	404	422	
Effective - Restaurant & Other	100	121	147	178	215	261	316	383	464	562	681	825	1,000	1,034	1,070	1,107	1,145	1,184	1,225	1,267	1,310	
Effective - Hotel & Lodge	4,800	4,876	4,954	5,033	5,113	5,194	5,276	5,360	5,445	5,532	5,620	5,709	5,800	5,892	5,985	6,079	6,175	6,273	6,372	6,472	6,575	
Other Revenues	1,024	399	399	2,524	1,899	1,899	2,524	1,899	1,899	6,024	1,899	1,899	2,168	918	918	5,168	3,918	3,918	5,168	3,918	3,918	
Training	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	
Advertising (web site, newslet Annual Conference)	625	-	-	2,125	1,500	1,500	2,125	1,500	1,500	2,125	1,500	1,500	1,250	-	-	4,250	3,000	3,000	4,250	3,000	3,000	
	399	399	399	399	399	399	399	399	399	399	399	399	918	918	918	918	918	918	918	918	918	
Total	6,584	5,519	5,937	8,138	7,700	8,100	8,390	8,498	8,452	13,058	9,046	9,849	10,318	8,472	9,180	13,092	12,459	12,430	13,855	12,786	13,022	
Cummulative	6,584	12,103	18,040	26,178	33,879	41,979	50,369	58,866	67,318	80,376	89,423	99,271	109,589	###	###	140,333	152,791	165,221	179,077	191,863	204,884	
	99,271												152,345									



Revenues (Cont)

Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11
50	52	53	55	57	59	61	63	66	68	70	73	75	77	79	81	83	85	87	89	91	93	95	98
5	5	5	5	6	6	6	6	6	6	7	7	7	7	7	8	8	8	8	9	9	9	9	10
15	15	15	15	15	15	15	15	15	15	15	15	15	16	16	17	18	19	19	20	21	22	23	24
35	36	36	37	37	38	38	39	40	40	41	41	42	43	43	44	45	45	46	46	47	48	49	49
400	350	50	350	350	350	100	350	400	100	600	150	350	600	100	850	600	350	350	600	600	600	600	650
150	100	50	100	100	100	100	100	150	100	100	150	100	100	100	100	100	100	100	100	100	100	100	150
-	-	-	-	250	-	-	-	-	-	250	-	-	-	-	250	-	-	-	250	-	-	-	250
-	-	-	-	-	-	-	-	-	-	-	-	-	250	-	250	250	250	-	250	250	250	250	250
250	250	-	250	-	250	-	250	250	-	250	-	250	250	-	250	250	-	250	-	250	250	250	-
9,500	9,639	9,780	9,924	10,070	10,220	10,372	10,527	10,686	10,847	11,011	11,179	11,350	11,577	11,811	12,050	12,295	12,546	12,804	13,069	13,340	13,619	13,905	14,199
500	517	535	553	572	592	612	633	655	678	701	725	750	768	787	806	825	846	866	887	909	931	953	976
500	514	529	544	559	575	592	608	626	644	662	681	700	721	743	765	788	812	837	862	888	915	942	971
1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,565	1,633	1,704	1,778	1,856	1,936	2,021	2,109	2,200	2,296	2,396
7,000	7,107	7,216	7,326	7,439	7,552	7,668	7,786	7,905	8,026	8,149	8,273	8,400	8,523	8,648	8,774	8,903	9,033	9,165	9,299	9,435	9,573	9,714	9,856
2,823	948	948	7,323	5,448	5,448	7,323	5,448	5,448	14,223	5,448	5,448	3,508	1,008	1,008	9,508	7,008	7,008	9,508	7,008	7,008	18,408	7,008	7,008
1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
1,875	-	-	6,375	4,500	4,500	6,375	4,500	4,500	6,375	4,500	4,500	2,500	-	-	8,500	6,000	6,000	8,500	6,000	6,000	8,500	6,000	6,000
948	948	948	948	948	948	948	948	948	948	948	948	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008
									6,900												8,900		
12,723	10,937	10,778	17,597	15,868	16,018	17,795	16,325	16,534	25,170	17,059	16,777	15,208	13,185	12,919	22,408	19,903	19,904	22,662	20,677	20,948	32,627	21,513	21,857
264,339	275,275	286,053	303,650	319,518	335,536	353,331	369,656	386,190	411,360	428,419	445,196	460,404	473,590	486,508	508,916	528,819	548,724	571,386	592,063	613,011	645,638	667,151	689,008
193,581												243,812											



Revenues (Cont)

Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12
100	102	104	106	108	110	112	114	116	118	120	123
10	10	10	11	11	11	11	12	12	12	12	13
25	25	26	26	27	27	27	28	28	29	29	30
50	50	50	50	50	50	50	50	50	50	50	50
600	100	350	350	350	100	100	600	100	350	100	650
100	100	100	100	100	100	100	100	100	100	100	150
-	-	-	250	-	-	-	250	-	-	-	250
250	-	250	-	250	-	-	250	-	250	-	250
250	-	-	-	-	-	-	-	-	-	-	-
14,500	14,579	14,660	14,742	14,825	14,910	14,997	15,085	15,175	15,266	15,359	15,454
1,000	1,019	1,038	1,057	1,077	1,097	1,118	1,139	1,160	1,182	1,204	1,227
1,000	1,022	1,045	1,068	1,091	1,116	1,140	1,165	1,191	1,217	1,244	1,272
2,500	2,538	2,577	2,617	2,657	2,697	2,739	2,781	2,823	2,866	2,910	2,955
10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
3,788	1,038	1,038	10,388	7,638	7,638	10,388	7,638	7,638	21,488	7,638	7,638
1	1	1	1	1	1	1	1	1	1	1	1
2,750	-	-	9,350	6,600	6,600	9,350	6,600	6,600	9,350	6,600	6,600
1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038
									11,100		
18,888	15,717	16,048	25,480	22,813	22,648	25,485	23,323	22,913	37,104	23,097	23,742
707,896	723,613	739,661	765,141	787,954	810,602	836,087	859,410	882,322	919,426	942,523	966,265
277,257											



d) Costs (activities)

EVENT				Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08	
Course Module	Duration (h)	Cost	Período													
Technical courses for Members' staff																
• Client Service	24	3,000	Sep/07													
• Reception	24	3,000	Sep/07				3,000									
• Public Relations & Communication	24	3,000	Oct/07				3,000									
• Hotel and Tourism Logistic	24	3,000	Oct/07					3,000								
• Hotel & Tourism Animation	24	3,000	Nov/07						3,000							
• Cost and Financial	24	3,000	Nov/07						3,000							
• Accounting For Hotel Industry	24	3,000	Dec/08							3,000						
• Food and Beverage Management	24	3,000	Dec/08							3,000						
• Restaurant, Bar and Table Service	24	3,000	Jan/08								3,000					
• Buffet and Banquet Service	24	3,000	Jan/08								3,000					
• Kitchen	24	3,000	Feb/08									3,000				
• Ground Floor Service	24	3,000	Feb/08									3,000				
• Hotel Maintenance	24	3,000	Mar/08										3,000			
• Languages	24	3,000	Mar/08											3,000		
MBO Development																
• Membership development	20	3,000	Apr/08												3,000	
• Marketing & Communication	20	3,000	Apr/08												3,000	
• Internal organization	20	3,000	May/08													3,000
• Finance for MBOs	20	3,000	May/08													3,000
Preparação e Implementação de Plano de	80	10,000	2007/2008	2500			2,500			2,500			2,500			
Total	496	64,000		2,500	-	-	8,500	6,000	6,000	8,500	6,000	6,000	8,500	6,000	6,000	6,000
Annual Conference																
• Organization	100	5,000	Mar/08									2,500	2,500			
• Promotion	100	5,000	Mar/08									2,500	2,500			
• Logistics	25	2,500	Mar/08									1,250	1,250			
Total	225	12,500		-	-	-	-	-	-	-	-	6,250	6,250	-	-	-
Documentary																
• Organization	200	10,000	Mar/08					5,000	5,000							
• Logistics	25	2,500	Mar/08					1,250	1,250							
Total	225	12,500		-	-	-	-	6,250	6,250	-	-	-	-	-	-	-
Website Maintenance																
• Organization	NA	2,000	2007/2008	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67
Total	0	2,000		167	167	167	167	167	167	167	167	167	167	167	167	167
Newsletter																
• Organization	NA	1,200	2007/2008	100	100	100	100	100	100	100	100	100	100	100	100	100
Total	0	1,200		100	100	100	100	100	100	100	100	100	100	100	100	100
Promotion																
• Organization	200	10,000	2007/2008		1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Total	200	10,000		-	1,000	1,000	1,000	1,000	1,000	1,000	-	1,000	1,000	1,000	1,000	1,000
Internal Organization																
• Procedures & Job Description	20	2,000	2007/2008		1,000	1,000										
• Hardware, Software & Training	20	3,000	2007/2008				1,500	1,500								
Total	40	5,000		-	1,000	1,000	1,500	1,500	-	-	-	-	-	-	-	-
Membership Management																
• Organization	20	2,000	2007/2008	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67	166.67
• Expenditures	20	3,000	2007/2008	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00	250.00
Total	40	5,000		417	417	417	417	417	417	417	417	417	417	417	417	417
TOTAL		112,200		3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683	7,683
Total Year				112,200												



e) Cash Flow

	Jun-07	Jul-07	Aug-07	Sep-07	Oct-07	Nov-07	Dec-07	Jan-08	Feb-08	Mar-08	Apr-08	May-08
Operational Cash Flow												
Joining Fees	550	-	300	250	300	550	50	600	350	600	450	950
Membership Fees	5,010	5,120	5,238	5,364	5,501	5,651	5,816	5,999	6,203	6,434	6,697	7,000
Training	625	-	-	2,125	1,500	1,500	2,125	1,500	1,500	2,125	1,500	1,500
Advertising	399	399	399	399	399	399	399	399	399	399	399	399
Annual Conference	-	-	-	-	-	-	-	-	-	3,500	-	-
(-) Value Added Tax	(149)	(58)	(58)	(367)	(276)	(276)	(367)	(276)	(276)	(875)	(276)	(276)
Office Running Costs	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585	1,585
HR - Permanent Structure	960	960	960	960	960	960	960	960	960	960	960	960
Events	3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683
Other	-	-	-	-	-	-	-	-	-	-	-	-
Financial Expenses (Interest)	-	3	1	-	59	165	253	292	315	401	473	493
Total Operational Cash Flow	707	230	650	(6,457)	(10,612)	(8,819)	(3,958)	(2,299)	(8,617)	(7,197)	(1,931)	(1,148)
Income Tax												
Working Capital	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)	(5)
Cash Flow from Investments												
CAPEX Purchases	-	-	-	-	-	-	-	-	-	-	-	-
CAPEX Disposals	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Investments	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow from Financing												
Loans	-	-	-	-	-	-	-	-	-	-	-	-
Cummulative Interest	-	-	-	-	-	-	-	-	-	-	-	-
Amortization	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Financing	-	-	-	-	-	-	-	-	-	-	-	-
Inicial Funding	-											
Additional Funding												
Donations & Subsidies												
Overdraft												
Opening	-	288	54	-	5,851	16,459	25,273	29,226	31,520	40,133	47,325	49,252
Disbursements	288	-	-	5,851	10,608	8,814	3,953	2,294	8,613	7,192	1,927	1,143
Payments	-	(235)	(54)	-	-	-	-	-	-	-	-	-
Closure	288	54	-	5,851	16,459	25,273	29,226	31,520	40,133	47,325	49,252	50,395
interest (not accrued)	-	3	1	-	59	165	253	292	315	401	473	493
Total	1,000	0	601	(601)	-	-	-	-	-	-	-	-
Inicial cash balance	-	1,000	1,000	1,601	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Fluxes cash	1,000	0	601	(601)	-	-	-	-	-	-	-	-
Final cash balance	1,000	1,000	1,601	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
												(3,092)
Cash flow before financing	712	235	655	(6,452)	(10,608)	(8,814)	(3,953)	(2,294)	(8,613)	(7,192)	(1,927)	(1,143)
Cumulative Cash flow	712	946	1,601	(4,851)	(15,459)	(24,273)	(28,226)	(30,520)	(39,133)	(46,325)	(48,252)	(49,395)
Auxiliary payback	-	-	-	-	-	-	-	-	-	-	-	-
Monthly discount rate	1.2%											
Discount factor	101.2%	102.4%	103.6%	104.8%	106.0%	107.2%	108.5%	109.8%	111.1%	112.4%	113.7%	115.0%



Cash Flow (Cont)

	Jun-08	Jul-08	Aug-08	Sep-08	Oct-08	Nov-08	Dec-08	Jan-09	Feb-09	Mar-09	Apr-09	May-09
Operational Cash Flow												
Joining Fees	800	50	600	100	550	350	350	350	400	350	650	350
Membership Fees	7,350	7,504	7,662	7,824	7,991	8,162	8,337	8,518	8,704	8,894	9,091	9,292
Training	1,250	-	-	4,250	3,000	3,000	4,250	3,000	3,000	4,250	3,000	3,000
Advertising	918	918	918	918	918	918	918	918	918	918	918	918
Annual Conference	-	-	-	-	-	-	-	-	-	5,100	-	-
(-) Value Added Tax	(315)	(133)	(133)	(751)	(569)	(569)	(751)	(569)	(569)	(1,492)	(569)	(569)
Office Running Costs	1,902	1,902	1,902	1,902	1,902	1,902	1,902	1,902	1,902	1,902	1,902	1,902
HR - Permanent Structure	1,152	1,152	1,152	1,152	1,152	1,152	1,152	1,152	1,152	1,152	1,152	1,152
Events	3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683
Other	-	-	-	-	-	-	-	-	-	-	-	-
Financial Expenses (Interest)	504	474	456	430	462	535	595	595	589	643	668	654
Total Operational Cash Flow	3,262	2,127	2,853	(2,827)	(7,060)	(5,662)	272	884	(5,124)	(2,110)	1,685	1,600
Income Tax												
Working Capital	297	297	297	297	297	297	297	297	297	297	297	297
Cash Flow from Investments												
CAPEX Purchases												
CAPEX Disposals												
Total Cash Flow from Investments	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow from Financing												
Loans	-	-	-	-	-	-	-	-	-	-	-	-
Cummulative Interest	-	-	-	-	-	-	-	-	-	-	-	-
Amortization	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Financing	-	-	-	-	-	-	-	-	-	-	-	-
Initial Funding												
Additional Funding												
Donations & Subsidies												
Overdraft												
Opening	50,395	47,431	45,601	43,045	46,168	53,525	59,484	59,509	58,922	64,343	66,750	65,363
Disbursements	-	-	-	3,124	7,357	5,959	25	-	5,421	2,407	-	-
Payments	(2,965)	(1,830)	(2,556)	-	-	-	-	(587)	-	-	(1,387)	(1,303)
Closure	47,431	45,601	43,045	46,168	53,525	59,484	59,509	58,922	64,343	66,750	65,363	64,060
Interest (not accrued)	504	474	456	430	462	535	595	595	589	643	668	654
Total	-	0	(0)	0	-	-	(0)	-	-	-	0	(0)
Initial cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Fluxes cash	-	0	(0)	0	-	-	(0)	-	-	-	0	(0)
Final cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
												(12,508)
Cash flow before financing	2,965	1,830	2,556	(3,124)	(7,357)	(5,959)	(25)	587	(5,421)	(2,407)	1,387	1,303
Cumulative Cash flow	(46,431)	(44,601)	(42,045)	(45,168)	(52,525)	(58,484)	(58,509)	(57,922)	(63,343)	(65,750)	(64,363)	(63,060)
Auxiliary payback	-	-	-	-	-	-	-	-	-	-	-	-
Monthly discount rate												
Discount factor	116.3%	117.7%	119.1%	120.5%	121.9%	123.3%	124.8%	126.2%	127.7%	129.2%	130.7%	132.3%



Cash Flow (Cont)

	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10
Operational Cash Flow												
Joining Fees	400	350	50	350	350	350	100	350	400	100	600	150
Membership Fees	9,500	9,639	9,780	9,924	10,070	10,220	10,372	10,527	10,686	10,847	11,011	11,179
Training	1,875	-	-	6,375	4,500	4,500	6,375	4,500	4,500	6,375	4,500	4,500
Advertising	948	948	948	948	948	948	948	948	948	948	948	948
Annual Conference	-	-	-	-	-	-	-	-	-	6,900	-	-
(-) Value Added Tax	(410)	(138)	(138)	(1,064)	(792)	(792)	(1,064)	(792)	(792)	(2,067)	(792)	(792)
Office Running Costs	2,282	2,282	2,282	2,282	2,282	2,282	2,282	2,282	2,282	2,282	2,282	2,282
HR - Permanent Structure	1,382	1,382	1,382	1,382	1,382	1,382	1,382	1,382	1,382	1,382	1,382	1,382
Events	3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683
Other	-	-	-	-	-	-	-	-	-	-	-	-
Financial Expenses (Interest)	641	595	559	524	520	568	600	569	536	562	540	499
Total Operational Cash Flow	4,824	3,856	3,733	661	(4,541)	(2,940)	3,283	3,616	(2,392)	2,443	4,380	4,138
Income Tax												(3,628)
Working Capital	250	250	250	250	250	250	250	250	250	250	250	250
Cash Flow from Investments												
CAPEX Purchases	-	-	-	-	-	-	-	-	-	-	-	-
CAPEX Disposals	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Investments	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow from Financing												
Loans	-	-	-	-	-	-	-	-	-	-	-	-
Cummulative Interest	-	-	-	-	-	-	-	-	-	-	-	-
Amortization	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Financing	-	-	-	-	-	-	-	-	-	-	-	-
Inicial Funding												
Additional Funding												
Donations & Subsidies												
Overdraft												
Opening	64,060	59,486	55,880	52,397	51,986	56,777	59,967	56,933	53,567	56,209	54,016	49,886
Disbursements	-	-	-	-	4,791	3,190	-	-	2,642	-	-	-
Payments	(4,574)	(3,606)	(3,483)	(411)	-	-	(3,033)	(3,366)	-	(2,193)	(4,130)	(260)
Closure	59,486	55,880	52,397	51,986	56,777	59,967	56,933	53,567	56,209	54,016	49,886	49,626
Interest (not accrued)	641	595	559	524	520	568	600	569	536	562	540	499
Total	-	(0)	0	0	-	-	-	(0)	0	-	-	(0)
Inicial cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Fluxes cash	-	(0)	0	0	-	-	-	(0)	0	-	-	(0)
Final cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
												(22,231)
Cash flow before financing	4,574	3,606	3,483	411	(4,791)	(3,190)	3,033	3,366	(2,642)	2,193	4,130	260
Cumulative Cash flow	(58,486)	(54,880)	(51,397)	(50,986)	(55,777)	(58,967)	(55,933)	(52,567)	(55,209)	(53,016)	(48,886)	(48,626)
Auxiliary payback	-	-	-	-	-	-	-	-	-	-	-	-
Monthly discount rate												
Discount factor	133.8%	135.4%	137.0%	138.6%	140.2%	141.8%	143.5%	145.2%	146.9%	148.6%	150.3%	152.1%



Cash Flow (Cont)

	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11
Operational Cash Flow												
Joining Fees	350	600	100	850	600	350	350	600	600	600	600	650
Membership Fees	11,350	11,577	11,811	12,050	12,295	12,546	12,804	13,069	13,340	13,619	13,905	14,199
Training	2,500	-	-	8,500	6,000	6,000	8,500	6,000	6,000	8,500	6,000	6,000
Advertising	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008	1,008
Annual Conference	-	-	-	-	-	-	-	-	-	8,900	-	-
(-) Value Added Tax	(510)	(146)	(146)	(1,382)	(1,018)	(1,018)	(1,382)	(1,018)	(1,018)	(2,675)	(1,018)	(1,018)
Office Running Costs	2,739	2,739	2,739	2,739	2,739	2,739	2,739	2,739	2,739	2,739	2,739	2,739
HR - Permanent Structure	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659	1,659
Events	3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683
Other	-	-	-	-	-	-	-	-	-	-	-	-
Financial Expenses (Interest)	496	433	381	331	288	303	304	233	162	151	64	-
Total Operational Cash Flow	6,621	5,525	5,310	4,614	(1,234)	252	7,396	7,345	1,437	8,970	8,349	8,757
Income Tax												(16,962)
Working Capital	303	303	303	303	303	303	303	303	303	303	303	303
Cash Flow from Investments												
CAPEX Purchases	-	-	-	-	-	-	-	-	-	-	-	-
CAPEX Disposals	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Investments	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow from Financing												
Loans	-	-	-	-	-	-	-	-	-	-	-	-
Cummulative Interest	-	-	-	-	-	-	-	-	-	-	-	-
Amortization	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Financing	-	-	-	-	-	-	-	-	-	-	-	-
Inicial Funding												
Additional Funding												
Donations & Subsidies												
Overdraft												
Opening	49,626	43,308	38,086	33,079	28,768	30,305	30,356	23,263	16,221	15,087	6,420	-
Disbursements	-	-	-	-	1,537	51	-	-	-	-	-	6,881
Payments	(6,318)	(5,222)	(5,007)	(4,311)	-	-	(7,093)	(7,042)	(1,134)	(8,667)	(6,420)	-
Closure	43,308	38,086	33,079	28,768	30,305	30,356	23,263	16,221	15,087	6,420	-	6,881
Interest (not accrued)	496	433	381	331	288	303	304	233	162	151	64	-
Total	-	-	-	-	0	(0)	-	-	(0)	-	1,626	(1,626)
Inicial cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	2,626
Fluxes cash	-	-	-	-	0	(0)	-	-	(0)	-	1,626	(1,626)
Final cash balance	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	2,626	1,000
												(32,569)
Cash flow before financing	6,318	5,222	5,007	4,311	(1,537)	(51)	7,093	7,042	1,134	8,667	8,046	(8,507)
Cumulative Cash flow	(42,308)	(37,086)	(32,079)	(27,768)	(29,305)	(29,356)	(22,263)	(15,221)	(14,087)	(5,420)	2,626	(5,881)
Auxiliary payback	-	-	-	-	-	-	-	-	-	-	2,626	-
Monthly discount rate												
Discount factor	153.9%	155.7%	157.5%	159.3%	161.2%	163.1%	165.0%	166.9%	168.9%	170.9%	172.9%	174.9%



Cash Flow (Cont)

	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12
Operational Cash Flow												
Joining Fees	600	100	350	350	350	100	100	600	100	350	100	650
Membership Fees	14,500	14,579	14,660	14,742	14,825	14,910	14,997	15,085	15,175	15,266	15,359	15,454
Training	2,750	-	-	9,350	6,600	6,600	9,350	6,600	6,600	9,350	6,600	6,600
Advertising	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038	1,038
Annual Conference	-	-	-	-	-	-	-	-	-	11,100	-	-
(-) Value Added Tax	(550)	(151)	(151)	(1,509)	(1,110)	(1,110)	(1,509)	(1,110)	(1,110)	(3,122)	(1,110)	(1,110)
Office Running Costs	3,287	3,287	3,287	3,287	3,287	3,287	3,287	3,287	3,287	3,287	3,287	3,287
HR - Permanent Structure	1,991	1,991	1,991	1,991	1,991	1,991	1,991	1,991	1,991	1,991	1,991	1,991
Events	3,183	2,683	2,683	11,683	15,433	13,933	9,183	7,683	13,933	16,433	7,683	7,683
Other	-	-	-	-	-	-	-	-	-	-	-	-
Financial Expenses (Interest)	69	-	-	-	-	-	-	-	-	-	-	-
Total Operational Cash Flow	9,808	7,606	7,936	7,010	993	2,328	9,515	9,252	2,592	12,271	9,027	9,671
Income Tax												(24,756)
Working Capital	181	181	181	181	181	181	181	181	181	181	181	181
Cash Flow from Investments												
CAPEX Purchases	-	-	-	-	-	-	-	-	-	-	-	-
CAPEX Disposals	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Investments	-	-	-	-	-	-	-	-	-	-	-	-
Cash Flow from Financing												
Loans	-	-	-	-	-	-	-	-	-	-	-	-
Cummulative Interest	-	-	-	-	-	-	-	-	-	-	-	-
Amortization	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow from Financing	-	-	-	-	-	-	-	-	-	-	-	-
Inicial Funding												
Additional Funding												
Donations & Subsidies												
Overdraft												
Opening	6,881	-	-	-	-	-	-	-	-	-	-	-
Disbursements	-	-	-	-	-	-	-	-	-	-	-	-
Payments	(6,881)	-	-	-	-	-	-	-	-	-	-	-
Closure	-	-	-	-	-	-	-	-	-	-	-	-
Interest (not accrued)	69	-	-	-	-	-	-	-	-	-	-	-
Total	2,746	7,425	7,755	6,829	812	2,147	9,334	9,072	2,411	12,090	8,846	(15,266)
Inicial cash balance	1,000	3,746	11,171	18,926	25,755	26,567	28,714	38,048	47,120	49,531	61,621	70,467
Fluxes cash	2,746	7,425	7,755	6,829	812	2,147	9,334	9,072	2,411	12,090	8,846	(15,266)
Final cash balance	3,746	11,171	18,926	25,755	26,567	28,714	38,048	47,120	49,531	61,621	70,467	55,201
												10,986
Cash flow before financing	9,627	7,425	7,755	6,829	812	2,147	9,334	9,072	2,411	12,090	8,846	(15,266)
Cumulative Cash flow	3,746	11,171	18,926	25,755	26,567	28,714	38,048	47,120	49,531	61,621	70,467	55,201
Auxiliary payback	3,746	-	-	-	-	-	-	-	-	-	-	-
Monthly discount rate												
Discount factor	176.9%	179.0%	181.1%	183.2%	185.4%	187.6%	189.8%	192.0%	194.2%	196.5%	198.8%	201.1%



e) Yearly Balance Sheet

Assets	Year 1	Year 2	Year 3	Year 4	Year 5
Bank & Cash	(3,092)	(12,508)	(22,231)	(32,569)	10,986
Inventory	3,937	5,889	7,592	9,655	11,033
Receivables	3,937	5,889	7,592	9,655	11,033
Fixed Assets	-	-	-	-	-
Total	4,781	(730)	(7,047)	(13,260)	33,052
Liabilities	Year 1	Year 2	Year 3	Year 4	Year 5
Suppliers	7,930	8,269	8,677	9,165	9,752
Short-term Debt (overdraft)	50,395	64,060	49,626	6,881	-
Long-term Debt	-	-	-	-	-
Equity	(53,544)	(73,059)	(65,349)	(29,306)	23,301
Equity	-	-	-	-	-
Lucros / prejuízos	(53,544)	(19,515)	7,710	36,043	52,607
Accumulated Capital Increase / Reinvestments	-	(53,544)	(73,059)	(65,349)	(29,306)
Total	4,781	(730)	(7,047)	(13,260)	33,052
Check	Year 1	Year 2	Year 3	Year 4	Year 5
Activos - Passivos	-	(0)	0	0	-



f) Yearly Income Statement

Income Statement	Year 1	Year 2	Year 3	Year 4	Year 5
Revenues	94,483	141,329	182,205	231,716	264,801
Joining Fee	4,950	4,900	3,550	6,250	3,750
Membership Fees	70,033	99,329	123,755	152,566	179,551
Training	16,000	32,000	48,000	64,000	70,400
Advertising	3,500	5,100	6,900	8,900	11,100
Annual Conference					
(-) VAT	(2,833)	(5,391)	(7,977)	(10,592)	(11,842)
Rate (%)	17.0%	17.0%	17.0%	17.0%	17.0%
Net Revenues	91,650	135,938	174,228	221,123	252,959
(-) COGS	-	-	-	-	-
Gross Margin	91,650	135,938	174,228	221,123	252,959
(-) Expenses	142,740	148,848	156,178	164,973	175,528
EBITDA	(51,090)	(12,910)	18,050	56,150	77,431
(-) Depreciation					
(-) Financial Expenses	(2,454)	(6,605)	(6,712)	(3,145)	(69)
(+) Donations & Subsidies	-	-	-	-	-
EBIT	(53,544)	(19,515)	11,338	53,005	77,363
(-) Income Tax	-	-	(3,628)	(16,962)	(24,756)
Taxa (%)	32.0%	32.0%	32.0%	32.0%	32.0%
Net Result	(53,544)	(19,515)	7,710	36,043	52,607
Product Margin	100%	100%	100%	100%	100%
Margem do LAJIR	-56%	-9%	10%	25%	31%
Profit Margin	-58%	-14%	4%	16%	21%
Cash Flow	Year 1	Year 2	Year 3	Year 4	Year 5
Net Result	(53,544)	(19,515)	7,710	36,043	52,607
(+) Depreciation	-	-	-	-	-
(-) Change in Working Capital	(56)	3,564	2,999	3,637	2,171
(+) CAPEX	-	-	-	-	-
Cash Requirements	(53,488)	(23,080)	4,711	32,406	50,436
(+) Loans	-	-	-	-	-
Cummulative Interests	-	-	-	-	-
(-) Amortization	-	-	-	-	-
(+) Additions	-	-	-	-	-
Overdraft					
(+) Drawdowns	50,684	24,293	10,623	8,469	-
(-) Repayments	(288)	(10,628)	(25,057)	(51,214)	(6,881)
Net Free Cash Flow	(3,092)	(9,415)	(9,723)	(10,338)	43,555
Fluxo de caixa dos acionistas	(3,092)	(9,415)	(9,723)	(10,338)	43,555
Discount Factor	0.87	0.76	0.66	0.57	0.50
Number of Periods	1	2	3	4	5
Discounted Cash Flow	(2,689)	(7,119)	(6,393)	(5,911)	21,654
Cash Balance	Year 1	Year 2	Year 3	Year 4	Year 5
Opening	-	(3,092)	(12,508)	(22,231)	(32,569)
(-/+) Net Free Cash Flow and Shareholders' Contributions	(3,092)	(9,415)	(9,723)	(10,338)	43,555
Ending	(3,092)	(12,508)	(22,231)	(32,569)	10,986



g) Yearly Working Capital

Working Capital	Year 1	Year 2	Year 3	Year 4	Year 5
Assets	7,874	11,777	15,184	19,310	22,067
Receivables	3,937	5,889	7,592	9,655	11,033
Payment Period	15	15	15	15	15
Inventory	3,937	5,889	7,592	9,655	11,033
Days of Revenue	15	15	15	15	15
Liabilities	7,930	8,269	8,677	9,165	9,752
Payables	7,930	8,269	8,677	9,165	9,752
Days of Cost	20	20	20	20	20
Net Working Capital	(56)	3,508	6,507	10,144	12,315
Changes in Working Capital	(56)	3,564	2,999	3,637	2,171

Revenues	Year 1	Year 2	Year 3	Year 4	Year 5
Total	94,483	141,329	182,205	231,716	264,801

Costs	Year 1	Year 2	Year 3	Year 4	Year 5
Costs	142,740	148,848	156,178	164,973	175,528
total costs	142,740	148,848	156,178	164,973	175,528



10.2. ANNEX - Training modules



10.2. ANNEX 2 – Training modules

Course Objectives

General Objectives:

To contribute to the development of the Mozambican Tourism Industry by increasing *“the functional management, technical and leadership skills of the personnel”*

Specific Objectives:

- Promote productivity and competitiveness of the beneficiary HOTEL'S;
- Facilitate and consolidate market access for the beneficiary HOTEL'S;
- Promote the sustainable growth of the beneficiary HOTEL'S;
- Make the beneficiary HOTEL'S; more business linkage-ready

The objectives will be prosecuted along the following lines:

Providing the course participants with technical know-how that will better prepare them to perform in their specific positions.

Encouraging their active participation in the discussions and to be active players in the learning process in order to maximize their personal development out of this experience.

Ensuring that the information is well absorbed and understood by all participants in order to become useful and practical tools in their daily worklife.



Participants

The course is geared to the the operational staff of various core as well as supporting functions of the hotel and restaurants: reception, kitchen, restaurant, accounting, public relations, maintenance, etc.

The total number of participants should reach 500, divided in 18 modules. Each module should have around 30 participants.

Given its modular structure, each course will address specific compartments of the operations and will therefore target different staff groups.

Given its practical nature, it is intended to address relevant operational issues that the participants can easily relate to and apply in their daily tasks.

Methodology

In each module particular issues will be addressed according to the nature of the information to be shared. Generally, it is paramount to the success of this training that each individual participant should feel he is benefiting from his/her participation, and that the new knowledge will have a direct impact on his ability to perform.

The general approach to the course is to encourage a participative attitude from all participants in order for them to effectively appropriate themselves from the knowledge to be brought, certainly by the trainers, but also by the trainees.

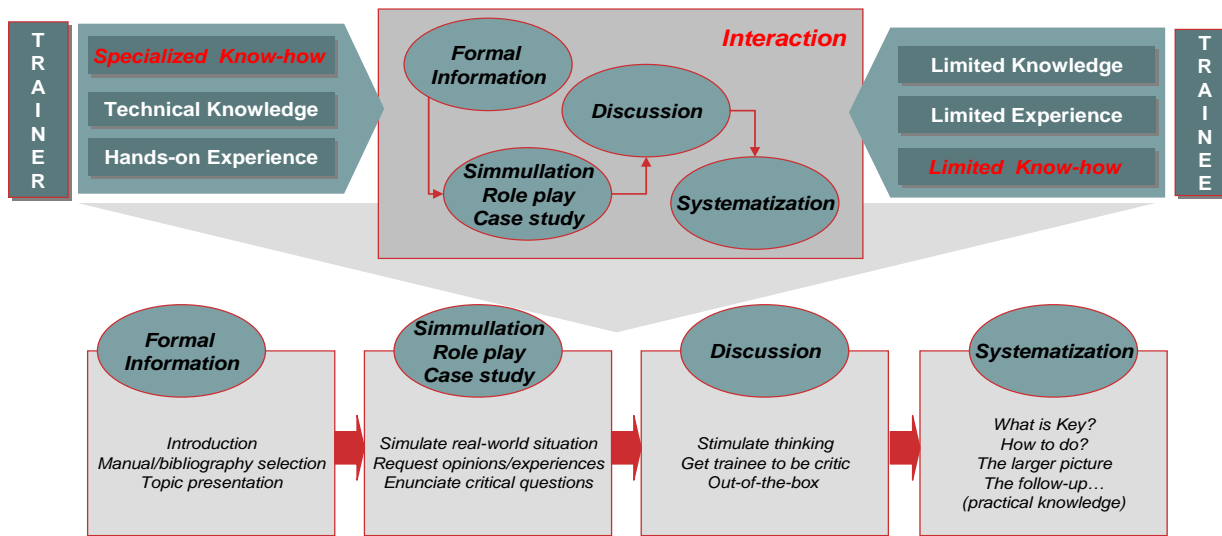
Because the duration of each module is rather short, it will be essential to depart from individual experiences of trainees in order to provide the knowledge that will be more relevant for them (in opposition to providing an extensive theoretical background). The **two-way methodology** should therefore be complemented by **simulation of real situations** and **role play** as a mean to involve the participants.

Each module will then start with the introduction of the key ideas and background, followed by the introduction of a real-world situation (case study, simulation, role play, site visit...), which will stimulate participation and subsequent discussion. The final part will be devoted to ordering the key aspects relevant to the theme of the module and to outline the basic learning (always related to the reality and specific challenges of the trainee).

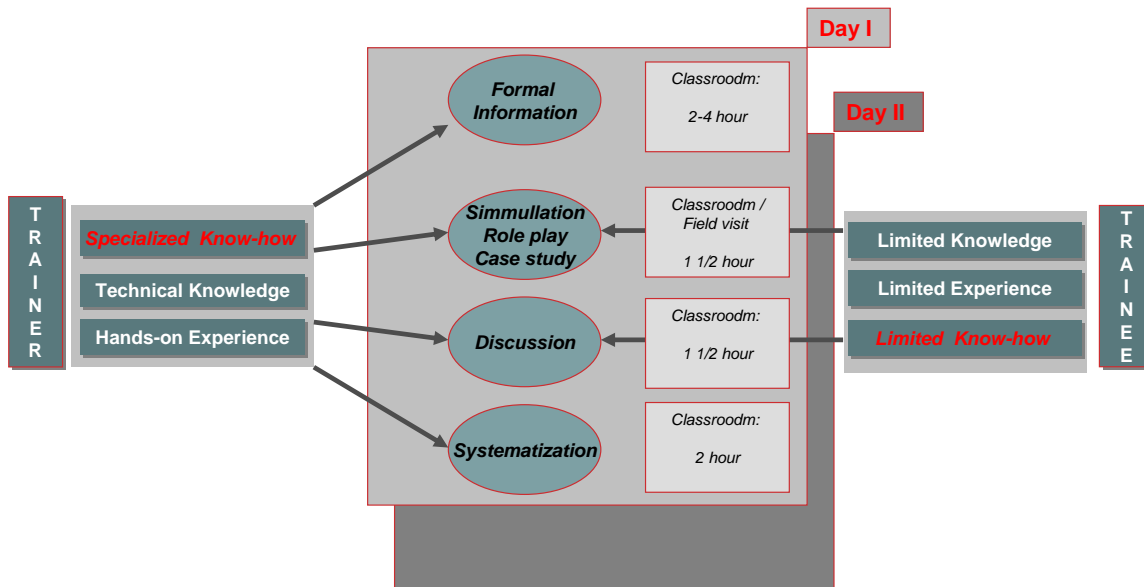
In each module will be provided a brief presentation on the eoverall importance of the industry to development (job and wealth creation, social development, etc,...), worldwide context and specificities of Mozambique.



Picturing the methodology:



Each Module should follow approximately the structure:



Formal Information Expository speech, with resource to hand out material with relevant technical information covering the main topics. Examples, graphic explanation and contextual perception. Resource to slide and data-show.

Simulation Role play Case study Facilitation of group dynamics, provocative interaction, invitation to criticism and observation. Field visits may require observation forms. Guidance to critical /relevant aspects of the observation. Case study / problem solving techniques. Conflict management.

Discussion Brainstorming, group dynamics and general guidance of discussion. Focus on specific issues and facilitation.

Systematization Structured/analytical thinking: inductive & deductive reasoning. Coaching and advisory. Conclusive reasoning and practical use: from knowledge to action.

The resources, namely the manuals and hard copied information will be provided. Specific hand outs:

- Course manual;
- Evaluation forms and reports (description and conclusions of the course);
- Preparation of case study / simulation / field visit;
- Graphic presentations Power (slides);
- Other specific documentation (when appropriated).



Training Programme Summary (1)

Client Service

Specific Objectives:

To create a wider perception of the client at the core of a service industry as Tourism. To give a better understanding on how to relate with clients and enhance client service. Worldwide trends.

Main Topics:

- Favourable arrangements for tourist companies VS clients;

- Customer behaviour;

Perceived quality

- Relative value perceived
- Competitor behaviour;

- Building value brands;

- Demand development and end-market
 - Diagnosis
 - Strategy;

- Identification of quality aspects as perceived by customer;

- The search for value by customer;

- Customer segmentation;

- Identification of quality criteria perceived; and

- “Case studies” companies perceived as having the greatest focus on customer satisfaction.

Training Programme Summary (2)

Reception Service

Specific Objectives:

To create the understanding of the role played by the reception as the first contact of the client with the hotel. How the perception of quality is determined by the reception/client service.

Main Topics:

- Presentation;

- Reception;

- Interpersonal management and conflict resolution;

- Internal information and communication;

- Procedures;

- Types of public;

- Reception-type messages;

- Conflict resolution; and

- How to avoid complaints.

Training Programme Summary (3)

Public Relations & Communication

Specific Objectives:

To create an understanding of the role of Public Relations & Communication at their various levels and their impact on the operations.

Main Topics:

- Public relations. What is it?;

- Public relations and public administration and companies;

- Public relations in tourism;

- Interpersonal management and conflict resolution;

- Internal information and communication (internal public relations);

- Negotiations;

- Participation at fairs, congresses and exhibitions;

- Relationships with consumers;

- Code of conduct;

- Press conferences (organisation and security clearances);

- Press conferences, and

- Crisis management.



Training Programme Summary (4)

Protocol

Specific Objectives:

To create an understanding of the relevance of protocol and what critical aspects to take into account when dealing with such situations where it is required.

Main Topics:

- Historical process;
- Customs and habits;
- Protocol and etiquette
 - Official etiquette
 - Parties for high-rank individuals, for the State and VIPs;
- Protocol language
 - Speeches, greetings and toasts
 - Forms of address and correspondence
 - protocol and hierarchy
 - Formal and informal conversation;
- Protocol priorities;
- Official, press, trade and educational visits;
- Seated parties
 - Invitations
 - Places at the table
 - Guests
 - Table layout, cards; and
- Dress code.

Training Programme Summary (5)

Hotel and Tourism Logistic

Specific Objectives:

To understand the specificities of Logistics within the Tourism industry, their relevance. The absolute importance of preventing disruptions and how these impact perceived quality. To have a better understanding of the logistic management within the Tourism industry context.

Main Topics:

- Customs regulation applicable to the hotel industry;
- Fiscal and tax exemption plans;
- Setup of specific delivery standards and commitments;
- Setup of global logistics projects;
- Setup of all logistics planning for supplies;
- Management of the positioning and follow up of suppliers and orders; and
- Management of all local and international transports.

Training Programme Summary (6)

Project Management

Specific Objectives:

To enable trainees to better understand how to manage the different phases of a project, from budgeting to execution, team leadership/delegation and overall control.

Main Topics:

- Departmental organisation and functions (hotel service organisation and skills);
- Different types of service and their applicability;
- International technical concepts (methodologies and procedures); and
- Welcoming and procedures manual.



Training Programme Summary (7)

Hotel & Tourism Entertainment

Specific Objectives:

Provide the trainee with the necessary tools for the development of tourism entertainment activities.

Main Topics:

- Recognise the role of entertainment in the development of tourism;
- Identify and characterise the different types of tourism entertainment;
- Understanding suitable methodologies for the development of tourism entertainment programmes;
- Simulate the development of tourism entertainment programmes (“Case studies”);
- Identify and characterise the participants in a tourism entertainment activity; and
- Define the profile of entertainers and identify their functions.

Training Programme Summary (8)

Cost Accounting For Hotel Industry

Specific Objectives:

The importance of management, control, and how to use the information that is available to assess the hotel performance at any point in time.

Main Topics:

Learn how to implement an effective cost accounting system. Walk step-by-step through cost accounting procedures - determining how to apply direct costing technique and developing a budget that allows effective control of costs.

The Profit & Loss Account System for Hotels

Understanding the different accounts
Establishing a budget and controlling it

Standard Costing

Approaches to setting standards
When standards should be changed

Cost-Volume-Profit Analysis

Break-even analysis in units and in currency
Margin of safety: its impact on cost decisions

Applying Relevant Costing to Evaluate Different Decision-Making Scenarios

Accepting business at a special price
Dropping a product line or closing a facility due to limiting factors to revenue

Training Programme Summary (9)

Specific Objectives:

To understand the main roles of Financial accounting, from planning & budgeting, execution and control, to reporting & compliance. To provide the trainees with the basic tools for pursuing Financial Accounting good practices and adopting generally accepted good principles.

- Basic Financial Accounting for the Hospitality Industry
- fundamentals of financial accounting
- accounting process and its function in hospitality operations.
- income statement and balance sheet
- Managerial Accounting for the Hospitality Industry
- effective managerial, business, and operational decisions
- analyze financial statements
- identify costs
- develop realistic budgets
- forecast
- plan cash flow



Training Programme Summary (10)	Training Programme Summary (11)	Training Programme Summary (12)
<p>Food and Beverage Management</p> <p>Specific Objectives: Improving trainees understanding of critical issues pertaining to F&B management and create the basic skills to improve their performance.</p> <p>Main Topics:</p> <ul style="list-style-type: none">• Food and Beverage Controls - help employees take charge of the complexities of controlling:<ul style="list-style-type: none">- food- beverages- labour- sales income• Covers standards determination• Operating budget• Income/cost control and control systems,• Basics of computers Vs F&B• Computer applications in planning and control functions.• Catering for Events - different types of banqueting, catering events, theme parties and other special events;• International technical concepts	<p>Restaurant, Bar and Table Service</p> <p>Specific Objectives: To review main issues relevant to the operations at the Restaurant and Bar, helping the trainees to improve their basic skills.</p> <p>Main Topics:</p> <ul style="list-style-type: none">• Helps supervisors and managers plan for and successfully manage the different types of food and beverage operations.• Coffee shops, gourmet dining rooms, room service, banquets,• Effective case studies• Attitude/ service Vs customer• Case studies• Practical simulation lesson• Health, hygiene and safety	<p>Buffet and Banquet Service</p> <p>Specific Objectives: To dotate trainees the basic knowledge of critical aspects of buffet and beverage management.</p> <p>Main Topics:</p> <ul style="list-style-type: none">• Food and beverage service planning and production for catering events;• Buffets; planning outside catering• Logistics; lay-outs, set-ups and creating atmospheres• Welcoming and procedures manual• International technical concepts (methodologies and procedures)



Training Programme Summary (13)

Kitchen

Specific Objectives:

To develop the basic skills of kitchen management and provide the trainees with the overall view of critical knowledge in kitchen management.

Main Topics:

- Kitchen Management
 - menu planning
 - pricing
 - receiving
 - storing
 - yield factors
 - recipe costing
 - kitchen organization
 - table service theories
 - kitchen set-ups
 - Ratios
- International technical concepts (methodologies and procedures)
- Package leaflet (photos showing dishes)

Training Programme Summary (14)

Ground Floor Service

Specific Objectives:

Housekeeping Management course presents a systematic approach to managing housekeeping operations and provides a thorough overview, from the big picture of maintaining a quality staff.

Main Topics:

- Planning and organizing,
- Technical details of cleaning each area of a hospitality facility.
- Room Check-lists

Training Programme Summary (15)

Hotel Maintenance

Specific Objectives:

Covering most critical aspects of maintenance, to create awareness of the role of hotel maintenance and develop the necessary skills to properly manage maintenance.

Main Topics:

- Quality Sanitation Management Shows how to minimize potential liability and better protect the health and safety of guests and staff;
- Sanitation risk management program that helps the properties to provide quality products and services
- Comply with regulations, and improve the bottom line;
- Energy and water saving;
- Measures taken for operational cost effectiveness;
- Maintenance regulations check-list;
- Frequent break-downs;
- Contingency and safety plans
- How to deal with situations



Training Programme Summary (16)

Business English

Specific Objectives:

The aims of this subject are to lead students to develop their linguistic-communicative skills and autonomy while using English for immediate purposes (in the business environment), more specifically:

Main Topics:

- Mobilise and systematise knowledge on the structure and functioning of the English language;
- Broaden skills in English to ensure a high degree of confidence when using this foreign language for personal and professional purposes;
- Strengthen and develop reading, writing, comprehension and oral skills in English in the areas of interest;
- Develop skills in the analysis, comprehension and discussion of situations and problems of technical nature, using English for those purposes.

Training Programme Summary (17)

Finance for BMOs

Accounting practices:

staff members are trained to deliver basic financial statements (balance sheets, income statements, cash flow) in an understandable, accurate and timely manner. The use of external financial accountants for more complex issues and audits is encouraged.

• Membership fee administration:

Partner BMOs receive help in adjusting their fee schedule (categories, graduation by size of membership, flat or fluctuating rate) and in how to improve the tracking and collection of dues, e.g., by facilitating workshops and staff exchanges, but also by supporting the introduction or improvement of a membership database.

• Income-generating services:

The promotion of new services for members should always be used to diversify the income base of the BMO.

Training Programme Summary (18)

Communication for BMOs

Specific Objectives:

Understand the importance of having a clear communication with AHSM stakeholders; how to plan and implement a successful communication strategy.

Main Topics:

Setting up a communication Strategy

Manage and maintain communication flow

Communication tools

PR & Media communication

Advertising and brand management

Assessing communication effectiveness

Internal vs External communication



10.3. ANNEX 3 - WEB Site



AHSM

Associação de Hotéis do Sul de Moçambique

Português | [Página Principal](#) | [A Associação](#) | [Actividades](#) | [Documentos](#) | [Associados](#) | [Contacte-nos](#)



TEMPO
Maputo **Maputo**
17-25°C **Xai-Xai**
Beira
Quelimane
Nampula

WEBMAIL
Usuário :
Senha :
[Entrar](#)

PUBLICIDADE

Bemvindo a Associação de Hotéis do Sul de Moçambique



A Associação de Hotéis do Sul de Moçambique tem como principal objectivo, a promoção da imagem do país como um todo e em particular a parte sul do Moçambique nomeadamente nas províncias da Maputo, Gaza e Inhambane. É nossa intenção defender os interesses de todos os membros, mantendo um permanente diálogo com o governo, organizações nacionais e internacionais assim como organizações similares. Esta tentativa garantirá a criação de um contínuo crescimento do clima do negócios nos sectores de hotelaria e turismo.

A Associação é uma associação sem fins lucrativos tendo como principal fonte de receitas as quotas mensais dos seus membros.



10.4. ANNEX 4 - Brochure

Associação de Hotéis do Sul de Moçambique

OBJECTIVES

- To promote the development of tourist and hotel industry in the south of the country
- To identify, study and propose solutions for the problems confronted by the members
- To participate actively in the process of definition of the strategy and policies of sector development and the country
- To participate in the effort of creation of an favourable environment of business in the tourism and hotel sector in Mozambique

STRATEGIC AREAS

- Institutional development of the AHSM
- Human Resources of the AHSM and associates
- Cooperation and change of experiences
- Organization of seminars, conferences and talks in order of associates networking
- Advocacy
- AHSM divulgation and promotion of the members
- Establishment of partnership for obtention of support and technical assistance in term of capacitation and concretization of investment projects or of the members development

Visite o nosso website para obter mais informações sobre os procedimentos de adesão à Associação!

Associação de Hotéis do Sul de Moçambique

Rua da Sé nº 114, Loja nº 33
Maputo - Mozambique
Tel: +258 21 31 4970 Fax: +258 31 4969
Email: secretariado@ahsm-mz.org
Webpage: www.ahsm-mz.org

Visite our website to get more information about the association and membership procedures!

PROMOVENDO A HOTELEIRA E O TURISMO EM MOÇAMBIQUE

PROMOVENDO A HOTELEIRA E O TURISMO EM MOÇAMBIQUE



PROMOVENDO A HOTELEIRA E O TURISMO EM MOÇAMBIQUE

BACKGROUND

AHSM is a association created by a body joint that acts in the hoindustry who has in the wallet the promotion of the all country image, and particullary the south of the country image.

VISION, MISSION AND VALUES

AHSM has as mission to favour and increase the good understanding and the solidarity between the members, with sight, designating, to the strengthening in the economic activity branch where they are integateg. Is vision it`s to make the AHSM an forum of turistic promotion and diálogo between the members and with the sovereign orgaans. The AHSM it`s pawing to secure the creation and share of the following values?

- Transparency
- Voluntary adhesion
- Increase value of the associates
- Solidarity

QUEM SOMOS

A AHSM é uma agremiação criada por um conjunto de entidades actuando na indústria hoteleira tendo em caretira a promoção da imagem do país no seu todo e em particular o sul do país.

MISSÃO, VISÃO E VALORES

A AHSM tem como missão favorecer e incrementar o bom entendimento e a solidariedade entre os

PROMOVENDO A HOTELEIRA E O TURISMO EM MOÇAMBIQUE



membros, com vista, designadamente, ao fcartalecimento do ramo de actividade económica em que se integram".

A sua visão é "fazer da AHSM um fórum de promoção turística e de diálogo entre os membros e com os órgãos de soberania".

A AHSM está empenhada em assegurar a criação e partilha dos seguintes valores:

- Transparência
- Adesão Voluntária
- Valorização dos associadoso
- Solidariedade
- Transparência

ESTRATÉGIA DA AHSM

A estratégia estratégico da AHSM consiste em alargar a sua representatividade e a sua capacidade de influência junto dos órgãos decisores visando melhorar o grau de competitividade das associadas de forma que possam competir no mercado nacional e internacional.

OBJECTIVOS

- Promover o desenvolvimento das indústrias hoteleira e turística no sul do país;
- Identificar, estudar e propor soluções dos problemas denfrentados pelos associados
- Intervir activamente no processo de definição de estratégias e políticas de desenvolvimento do sector e do país;
- Partipar nos esforços de criação de um ambiente

PROMOVENDO A HOTELEIRA E O TURISMO EM MOÇAMBIQUE



favorável de negócios no sector de hotelaria e turismo em Moçambique.

ÁREAS ESTRATÉGICAS

- Desenvolvimento Institucional da AHSM
- Desenvolvimento de Recursos Humanos internos e dos associados
- Cooperação e Troca de Experiência
- Organização de seminários, conferências e palestras em ordem ao networking dos associados
- Advocacia
- Divulgação da AHSM e promoção dos Associados
- Estabelecimento de parcerias para obtenção de apoio e assistência técnica, em termos de capacitação e concretização de projectos de investimento ou de desenvolvimento dos associados.

ESTATUTOS E MEMBROS

- MEMBRO FUNDADOR
- MEMBRO EFECTIVO
- MEMBRO BENEMÉRITO
- MEMBRO HONORÁRIO
- MEMBRO ALIADO

STATUTORY PARTICULARS & MEMBERSHIP

- MEMBRO FUNDADOR
- MEMBRO EFECTIVO
- MEMBRO BENEMÉRITO
- MEMBRO HONORÁRIO
- MEMBRO ALIADO

**10.5. ANNEX 5 - Membership Form**

Rua da Sé nº 114, Loja nº 33, Maputo – MOÇAMBIQUE
 Tel.: +258 21 31 4970
 Fax: +258 21 31 4969
 Email: secretariado@ahsm-mz.org
 Webpage: www.ahsm-mz.org

Membership Application - Ficha de Inscrição de Membro**DADOS DO MEMBRO**

Membro nº _____

Candidato	_____		
Morada	_____		
Caixa Postal	_____	Localidade	_____
Província	_____	País	_____
Telefone	_____	Fax	_____
Celular	_____	Email	_____

Coloque aqui:

*Fotografia
do Membro
Singular /Individual
Ou
Logotipo da
Instituição*

QUE TIPO DE MEMBRO É

Hotel Restaurante Singular /Individual Outro: _____

CATEGORIA DE MEMBRO A QUE PRETENDE SE PROPÔR¹

Membro Efectivo
(preencha Quadro seguinte e o verso) **Membro Aliado**
(vire por favor e preencha o verso) **Membro Individual**
(vire por favor e preencha o verso)

COMO TEVE CONHECIMENTO DA AHSM

Outro Membro Meios de Comunicação Website da AHSM
 Ministério da Turismo Outro (especificar) _____

PARA OS MEMBROS EFECTIVOS

Nome do Representante	_____		
Posição	_____	Nacionalidade	_____
Capital Social	_____	Investimento Inicial	_____
Sócios (% sócio)	_____		
Total Funcionários	_____	Total Mulheres	_____
Licença nº	_____	NUIT nº	_____
Data Licenciamento	_____	Data Início Projecto	_____
Data Início Operações	_____	Data Início Produção	_____
Certificações	_____	Entidade(s)	_____
Capacidade	Quartos Nº	Salas de Restaurante	Nº
	Salas de Conferência Nº	Salas de Café/Bar	Nº
Outras instalações	_____		

¹ Ver Condições de cada tipo de Membro. Os candidatos a Membros Efectivos deverão obrigatoriamente ser empresas devidamente licenciadas em Moçambique pelo Ministério do Turismo ou órgão competente



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PARA OS MEMBROS ASSOCIADOS (Dados complementares para SINGULAR /INDIVIDUAL e ESTUDANTES)

Profissão		Instituição	
Morada Profissional			
Caixa Postal		Localidade	
Telefone Profissional		Fax Profissional	
Celular Profissional		Email Profissional	
Habilitações (grau)		Curso	

PARA OS MEMBROS ASSOCIADOS (Dados complementares para INSTITUIÇÕES)

Nome do Representante			
Posição		Nacionalidade	
Área de Actividade			

ÁREAS DE INTERESSE (A preencher por todo o tipo de candidatos)

<input type="checkbox"/> Formação	<input type="checkbox"/> Workshops com Especialistas	<input type="checkbox"/> Conferências
<input type="checkbox"/> Marketing e Feiras	<input type="checkbox"/> Estudos, Investigação, Inovação	<input type="checkbox"/> Mercados
<input type="checkbox"/> Informação	<input type="checkbox"/> Outras (especificar)	

JÓIA E QUOTAS

Membros Efectivos	Membros Aliados	Membros Individuais
<input type="checkbox"/> Jóia de Inscrição: US\$250.00	<input type="checkbox"/> Jóia de Inscrição: US\$250.00	<input type="checkbox"/> Jóia de Inscrição: US\$50.00

Quotas Mensais Membros Efectivos (Maputo)

<input type="checkbox"/> 5 e 4 Estrelas: US\$3,00	<input type="checkbox"/> 3 e 2 Estrelas: US\$2,50
<input type="checkbox"/> 1 Estrela e Outros: US\$2,00	<input type="checkbox"/>

Quotas Mensais Membros (Capitais Provinciais; Valor por Quarto)

<input type="checkbox"/> Grupo A (5 e 4 Estrelas): US\$3,00	<input type="checkbox"/> Grupo B (3 e 2 Estrelas): US\$2,50
<input type="checkbox"/> Grupo C (1 Estrela e Outros): US\$2,00	<input type="checkbox"/>

Quotas Mensais Membros (Outras Zonas; Valor por Quarto)

<input type="checkbox"/> Grupo A (5 e 4 Estrelas): US\$2,60	<input type="checkbox"/> Grupo B (3 e 2 Estrelas): US\$2,20
<input type="checkbox"/> Grupo C (1 Estrela e Outros): US\$1,70	<input type="checkbox"/>

Quotas Mensais Membros Aliados

US\$ 100

Membros Individuais

US\$10



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PORQUE ME CANDIDATO A MEMBRO

PORQUE RECOMENDO ESTE CANDIDATO

MUITO IMPORTANTE

Queira por favor entregar este impresso devidamente preenchido para aprovação. Aguarde pelo Comunicado com a Aprovação formal e após a sua recepção queira por favor liquidar a Jóia de Entrada e Quota Anual.

Candidato Membro	Recomendação	Validação	Aprovação
_____ <i>Assinatura</i> Nome: _____	_____ <i>Assinatura</i> Nome: _____	_____ <i>Assinatura</i> Director Executivo	_____ <i>Assinatura</i> Presidente Direcção

COMENTÁRIOS E OBSERVAÇÕES – Director Executivo

AVALIAÇÃO E APRECIACÃO – Conselho Directivo



10.6. ANNEX 6 - Statutes

758

III SÉRIE -- NÚMERO 31

Associação dos Hotéis do Sul de Moçambique

Certifico, para efeitos de publicação, que por escritura de 05 de Março do ano de mil e dois, lavrada a folhas trinta e cinco e seguintes do livro de notas para escritura diversos número quinhentos e trinta e oito D do Trovesso Cartório Notarial de Maputo, a cargo de Silvina Manuela Macaluso Batoz Tembo, assistente técnica dos registos e assinada e subscrita do notário despendido notário Ar. constituiu-se a Associação dos Hotéis do Sul de Moçambique com sede em Vila Fontaine, Avenida Imprescindíveis Turísticos e Hotelaria, Lda, Lda, Hotel Carlos, SAREL, Promotor Sociedade Promotora de Desenvolvimento Turístico, Lda, Lda, Residencial Hoje-Hoje, Hotel-Complexo Turístico, Lda, Lda, Hotel Pelara, Lda, Lda, Savonhas Moçambique Investimentos Turísticos, SAREL, Hotel Seta Cruz, Sociedade Hotel Tivoli, Lda, Lda, Hotel Tarama, SAREL, Hotel Defago Carlton, Lda, Lda, Sociedade Turística de Inhaca, Lda, Lda, uma associação que se regerá nos termos constantes dos artigos seguintes:

CAPÍTULO I

Da denominação, natureza e sede

ARTIGO PRIMEIRO

Um) A Associação dos Hotéis do Sul de Moçambique, abreviadamente designada por AHSM, aditará designada por associação, é uma pessoa colectiva de direito privado, sem fins lucrativos com personalidade jurídica e autonomia administrativa, financeira e patrimonial.

Dois) Por deliberação do conselho de direcção a associação pode estabelecer delegações e quaisquer outras formas de representação social onde e quando o julgar conveniente.

Três) As delegações da associação serão criadas de acordo com as necessidades e em vista a finalidade de assegurar as funções e actividades da associação em qualquer ponto do país e/ou no estrangeiro.

ARTIGO SEGUNDO

Duração

A associação subsistirá por tempo indeterminado, existindo-se o seu início a partir da data da sua constituição.

ARTIGO TERCEIRO

Objecto

São fins e atribuições da associação a defesa e a promoção dos direitos e interesses das empresas hoteleiras, enquanto tais, que representem, nomeadamente:

- a) Favorecer e incrementar o bom relacionamento e a solidariedade entre os seus membros, com vista, designadamente, ao fortalecimento do senso de actividade económica em que se integram;
- b) Promover o turismo;
- c) Dialogar, pela via adequada, com as órgãos de soberania, em ordem à criação de legislação que contemple, de forma actualizada, os reais interesses das empresas hoteleiras;

- d) Negociar e celebrar, nos termos da lei, convenções colectivas de trabalho;
- e) Organizar e manter em funcionamento serviços informativos, idiomas, logísticos e outros adequados aos seus fins;
- f) Promover e apoiar a organização de cursos de formação profissional, conferências, congressos e outras publicações de interesse para os seus membros;
- g) Promover acções de marketing que visem a promoção da imagem da parte, como destino turístico e particularmente a cidade e provincia de Maputo e o sul de Moçambique.

CAPÍTULO II

Dos membros

ARTIGO QUARTO

Um) Podem ser membros da associação todas as pessoas singulares ou colectivas, físicas ou jurídicas, nacionais ou estrangeiras, residentes ou não no território nacional, que adiram aos presentes estatutos e paguem para a prossecução do seu objecto.

Dois) As pessoas físicas só podem ser membros da associação desde que tenham a idade

ARTIGO QUINTO

Categoria dos membros

Um) Os membros da associação agrupam-se em seguintes categorias:

- a) Membros fundadores;
- b) Membros efectivos;
- c) Membros honorários;
- d) Membros associados;
- e) Aliados.

Dois) A qualidade dos membros da associação é pessoal e intransmissível podendo, no entanto, qualquer membro em caso de ausência ou impedimento, impedições fazer-se representar por outro membro ou associado geral mediante declaração escrita e endereçada ao respectivo presidente da mesa.

Três) Podem ser associados na mesma pessoa mais do que uma das categorias de membros indicadas no presente artigo.

ARTIGO SEXTO

Membros fundadores

São membros fundadores todas as pessoas singulares ou colectivas, físicas ou estrangeiras, que tenham subscrito a escritura constitutiva da associação e que concordarem nos termos e condições constantes dos presentes estatutos.

ARTIGO SÉTIMO

Membros efectivos

Um) São membros efectivos todas as empresas hoteleiras em exercicio de actividade no provincial e cidade de Maputo, Gaza e Inhambane.

Dois) Para todos os efeitos de direito material, consideram-se empresas hoteleiras as pessoas jurídicas, singulares ou colectivas, que se encontrem efectivamente estabelecimentos com a classificação oficial de hotel, possada, loge,

estalagem, motel, hotéis-apartamento, alojamento turístico e apartamentos turísticos, turística residencial — dezoito) que obtiverem os requisitos de qualidade previamente estabelecidos para o país pelas autoridades competentes que se enquadram no regulamento interno da associação.

ARTIGO OITAVO

Membros honorários

São membros honorários todas as pessoas singulares ou colectivas, nacionais ou estrangeiras, que pelo seu cargo e actividade tenham contribuído de modo significativo com subsídios, bens materiais ou serviços para a criação, manutenção ou desenvolvimento da associação.

ARTIGO NONO

Membros honorários

São membros honorários, as pessoas singulares ou colectivas, nacionais ou estrangeiras, que pelo seu cargo e actividade tenham contribuído de modo relevante para a criação, manutenção ou progresso da associação.

ARTIGO DÉCIMO

Membros associados

São membros associados aqueles que em razão de actividade diferente da sua, no âmbito da actividade turística, pretendam filiar-se na associação.

ARTIGO DÉCIMO PRIMEIRO

Admissão de membros efectivos

Um) A admissão de membros efectivos efetua-se mediante apresentação de uma proposta subscrita pelo próprio ou comissão de direcção, aprovada por dois membros efectivos no pleno ou pelo conselho de direcção que decide por maioria dos votos do corpo presente.

Dois) No acto de apresentação da proposta e quando a mesma for aprovada pelo pleno ou conselho de direcção, deverá apresentar-se a documentação requerida dos estatutos e o alvará de admissão emitida por carta de joze, em direito a sua devolução no caso de recusa.

Três) A admissão do membro só poderá ser feita depois de o mesmo não se encontrar inscrito em qualquer outra associação ou entidade.

ARTIGO DÉCIMO SEGUNDO

Admissão de membros honorários, aliados e associados

A admissão de membros honorários e associados, será proposta pelo conselho de direcção ou por um número de cinco membros fundadores no pleno por dois votos absolutos e votada pelo conselho geral.

ARTIGO DÉCIMO TERCEIRO

Direitos e deveres dos membros

Os membros para além dos direitos e deveres consagrados pela lei vigente, têm ainda

Um) O direito de:

- a) Participar nos assembleias gerais;
- b) Eleger e ser eleito para os órgãos sociais da associação;



- c) Utilizar as instalações e serviços da associação de acordo com os respectivos regulamentos;
- d) Beneficiar preferencialmente das oportunidades de trabalho a serem disponibilizadas para a prossecução do objecto social da associação;
- e) Participar em reuniões, debates, seminários, conferências e outras acções que sejam levadas a cabo, visando a prossecução do objecto social da associação;
- f) Apresentar ao conselho de direcção planos, propostas e sugestões sobre o desenvolvimento das actividades da associação;
- g) Manter dos benefícios e regalias que a associação devesse auferir em proporção aos seus estatutos.

Deix) O dever de:

- a) Pagar a jóia e, posteriormente, as quotas;
- b) Aceitar de desempenho cargo para que forem eleitos, salvo motivo justificado;
- c) Tomar parte nas assembleias gerais;
- d) Participar na realização do objecto social da associação, prestando a sua colaboração de acordo com o seu saber e experiência profissional descomprometida com todo os tarefas que lhe forem atribuídas;
- e) Realizar com dedicação os trabalhos que lhe forem confiados, salvo os motivos pedidos e impenháveis;
- f) Recusar aceitar ou prestar quaisquer trabalhos e do mesmo modo abster-se de qualquer acção sempre que dos mesmos possa resultar prejuízo para a realização do objecto social ou dos interesses da associação.

Triés) Somente os sócios efectivos e fundadores tem direito a voto.

Quatros) Sem prejuízo do disposto no número anterior, são prerrogativas exclusivas dos factíveis efectivos e fundadores, os direitos referidos nos artigos a) b) e c) do número um deste artigo.

ARTIGO DÉCIMO QUARTO

Exoneração dos membros

Um) O membro efectivo que pretenda exercer-se deverá comunicá-lo por escrito ao conselho de direcção e só poderá faltar no fim de um exercício social, com pré-aviso de trinta dias e desde que liquide qualquer dívida contraída durante o período da sua permanência na associação.

Dois) Sem limitação do direito de exoneração, a assembleia geral poderá estabelecer regras e condições para o seu exercício.

ARTIGO DÉCIMO QUINTO

Perda da qualidade de membros

Um) perdem a qualidade de membros, os que:

- a) Terham cessado a sua actividade no sector e não possam continuar imbuídos nos termos do artigo oitavo dos estatutos;
- b) Sejam condenados judicialmente pela prática de crime doloso com pena superior a dois anos de prisão;

c) Com culpa grave violarem os direitos previstos na lei, estatutos, regulamento e outras deliberações tomadas publicamente pelos órgãos sociais da associação, se a falta cometida, pela sua natureza, gravidade e circunstâncias, houver comprometido a ordem e disciplina, o mérito, prestígio e os interesses da associação, mostrar que o faltoso é indigno de continuar a ser membro;

d) Praticarem actos injuriosos ou difamatórios contra a associação quando daí resultarem as consequências previstas na alínea anterior;

e) Sendo responsáveis por dano causado, se recusarem a sua pronta reparação;

f) Que se encontrarem há mais de seis meses em mora no pagamento das suas quotas e os não regularizarem no prazo que lhes for comunicado pela direcção, através de carta registada com aviso de recepção, sem prejuízo da sua inadimplência, por decisão do mesmo órgão, uma vez efectuado o pagamento.

Dois) A expulsão prevista nos artigos c), d) e f), só pode ter lugar mediante proposta do conselho de direcção ou de um número de cinco membros observados os termos processuais estabelecidos no regulamento interno e será deliberada em assembleia geral por maioria de dois terços dos membros efectivos. A expulsão de um membro fundador requer a maioria absoluta do voto favorável de todos os outros membros fundadores.

ARTIGO DÉCIMO SEXTO

Regime disciplinar

As infrações previstas nos estatutos e regulamentos internos e a inobservância das determinações dos órgãos da associação legitimamente chamadas constituem ilícito disciplinar, a punir no respectivo processo, imputado a aplicação das seguintes sanções:

- a) Suspensão eventual;
- b) Advertência registada;
- c) Multa até ao valor de cinco anos de quota, cujo destino será fixado pela assembleia geral;
- d) Expulsão.

CAPÍTULO III

Do património

ARTIGO DÉCIMO SÉTIMO

Fundos

Um) Os fundos próprios da associação serão constituídos com base em:

- a) Quaisquer subordinações, doações, heranças, legados ou doações de entidades públicas ou privadas, mercantilizadas ou estrangeiras e todos e bens que adquirem a título gratuito ou oneroso da prestação de serviços a terceiros;
- b) Juros e quotas pagos pelos seus membros;
- c) Todos os bens móveis ou imóveis adquiridos para o seu funcionamento e instalação ou se resultarem provenientes do investimento de

seus bens próprios visando a materialização dos objectivos da associação.

Dois) A atribuição de fundos - os recursos económicos e financeiros entre a associação e as delegações serão estabelecidos pelo regulamento interno.

CAPÍTULO IV

Dos órgãos sociais

ARTIGO DÉCIMO OITAVO

Órgãos

Os órgãos sociais da associação são:

- a) A assembleia geral;
- b) O conselho de direcção;
- c) O conselho fiscal.

ARTIGO DÉCIMO NONO

Assembleia geral

Um) A assembleia geral é o órgão supremo da associação e é constituída por todos os seus membros efectivos e fundadores e o pleno grupo dos seus directores.

Dois) As deliberações da assembleia geral tomadas em conformidade com a lei e com os poderes estatutários, são obrigatórias para todos os membros.

Três) Cada membro fundador e efectivo tem direito a um voto.

ARTIGO VIGÉSIMO

Competências da assembleia geral

Compete à assembleia geral:

- a) Eleger e escolher os membros do mesa da assembleia geral, do conselho de direcção e os membros do conselho fiscal;
- b) Aprovar o programa geral de actividade da associação;
- c) Deliberar sobre a alteração de estatutos e contracção de empréstimos;
- d) Apreciar e votar o relatório, balanço e contas anuais da associação e deliberar sobre a aplicação dos resultados líquidos ao exercício económico final na prossecução do fim e objectivos da associação;
- e) Aprovar o programa e orçamento anuais da associação;
- f) Definir anualmente o valor da jóia e quotas a pagar pelos membros;
- g) Deliberar sobre os recursos de decisão tomadas pelo conselho de direcção;
- h) Decidir sobre a remuneração a atribuir aos membros dos órgãos sociais;
- i) Alterar os estatutos e aprovar o regulamento interno da associação e demais regulamentos que emanem dos mesmos;
- j) Deliberar sobre a constituição da associação e sobre a autorização para esta demandar os adiantamentos por fundo praticado no verso do seu cargo;
- k) Deliberar sobre quaisquer questões que lhe seja submetida e não seja da competência dos outros órgãos sociais.

**ARTIGO VIGÉSIMO PRIMEIRO****Mesa da assembleia geral**

Um) A mesa da assembleia geral é constituída por um presidente, um vice-presidente, que é substituído nas suas ausências e impedimentos e por um secretário e um suplente.

Dois) Os membros da mesa da assembleia geral serão eleitos mediante proposta e aprovação por pelo menos dois membros fundadores da associação, pelo período de três anos podendo ser reeleitos por mais de três anos consecutivos.

Três) Compete ao presidente da assembleia geral:

- Convocar a assembleia geral por sua iniciativa ou a pedido do conselho de administração de pelo menos cinco fundadores ou efectivos;
- Impor os membros dos órgãos sociais, no prazo de trinta dias;
- Assinar as actas das reuniões da assembleia geral;
- Presidir nas reuniões organizadas pela associação.

Quatro) Compete ao secretário:

- Redigir e assinar as actas das sessões da assembleia geral;
- Praticar todos os actos de administração necessários ao bom funcionamento e eficiência da assembleia geral.

Cinco) O presidente poderá ou não ser membro efectivo ou fundador.

ARTIGO VIGÉSIMO SEGUNDO**Funcionamento da assembleia geral**

Um) A assembleia geral reúne-se ordinariamente uma vez por ano e os trabalhos serão dirigidos pela respectiva mesa.

Dois) A assembleia geral reúne-se extraordinariamente sempre que convocada nos termos das presentes estatutas.

Três) A assembleia geral reúne-se sempre que convocação com pelo menos duas de metade dos membros fundadores ou com os membros efectivos presentes.

Quatro) A assembleia geral é convocada por carta registada com aviso de recepção com uma antecedência mínima de quarenta dias. Em caso de atraso extraordinário o prazo referido anteriormente poderá ser reduzido para sete dias.

ARTIGO VIGÉSIMO TERCEIRO**Votação**

Um) As deliberações da assembleia são tomadas por maioria dos votos presentes, salvo se as deliberações respeitarem à alteração dos estatutos ou à destituição dos dirigentes, situação em que será exigida uma maioria de três quartos dos presentes ou três quartos do número dos associados presentes.

Dois) A votação nas reuniões da assembleia geral é feita pessoalmente, ou mediante delegação em qualquer dos sócios fundadores ou efectivos presentes, através de meio escrito dirigido ao presidente da mesa.

Três) A votação dos sócios presentes ou representados será feita por levantados e sentados, ou por aclamação.

Quatro) Proceder-se-á, porém, a votação nominal ou por escrutínio secreto e impessoal de qualquer dos membros fundadores ou efectivos presentes, sempre que maioria.

Cinco) As votações que respeitem a questões pessoais de qualquer sócio serão feitas por escrutínio secreto, não podendo o titular de direito de voto.

ARTIGO VIGÉSIMO QUARTO**Conselho de direcção**

Um) O conselho de direcção é composto por um presidente, um vice-presidente, um secretário, um co-secrário e um suplente de cada um dos membros fundadores em assembleia geral.

Dois) As deliberações do conselho de direcção são tomadas por maioria simples dos votos presentes cabendo a cada membro um único voto.

Três) O exercício de mandatos sucessivos na mesma função é limitado a quatro.

ARTIGO VIGÉSIMO QUINTO**Competências do conselho de direcção**

Compete ao conselho de direcção em geral administrar e gerir a associação entre as sessões da assembleia geral e decidir sobre todos os assuntos que os presentes estatutos ou a lei não atribuem a outros órgãos sociais em especial:

- Representar a associação passivamente em juízo e fora dele;
- Cumprir e fazer cumprir as disposições legais, estatutárias e as deliberações da assembleia geral;
- Nomear e destituir o director executivo e demais directores executivos necessários para assegurar a gestão diária da associação;
- Elaborar e apresentar anualmente à assembleia geral o relatório, o balanço económico e financeiro de contas do exercício, bem como o programa de actividades e o orçamento de ano seguinte;
- Decidir sobre os programas e projectos que a organização deve executar;
- Adquirir, atender, ou alienar mediante prévio parecer favorável do conselho fiscal, ou bem através que se mostre necessário à execução do objectivo social, sem prejuízo da observância das disposições legais pertinentes;
- Praticar todos os actos necessários ao bom funcionamento da associação;
- Decidir sobre os casos de admissão de membros subscritas pelo director executivo;
- Negociar e outorgar convenções colectivas de trabalho;
- Elaborar a proposta de regulamento interno a ser apreciada e aprovada pela assembleia geral;

- Praticar todos os actos de gestão adequados aos fins da associação e que não sejam da competência dos outros órgãos.

ARTIGO VIGÉSIMO SEXTO**Funcionamento do conselho de direcção**

Um) O conselho de direcção reúne-se ordinariamente pelo menos uma vez por mês e sempre que convocada pelo presidente ou seu substituído e extraordinariamente sempre que convocada pelo seu presidente ou a pedido do pelo menos três dos seus membros, através de carta, telex ou qualquer outro meio idóneo para o efeito com pelo menos cinco dias de antecedência, podendo este prazo ser reduzido para dois dias em caso de extrema necessidade.

Dois) O regulamento interno definirá as demais normas necessárias ao seu bom funcionamento.

ARTIGO VIGÉSIMO SÉTIMO**Conselho fiscal**

Um) O conselho fiscal é constituído por três membros eleitos pela assembleia geral mediante proposta da própria assembleia geral e de pelo menos dois membros fundadores e três efectivos sendo o seu mandato de três anos.

Dois) O conselho fiscal é constituído por um presidente, um secretário e um vogal sendo as suas decisões tomadas por maioria simples dos seus membros cabendo a cada um, um único voto.

Três) Para deliberação da assembleia geral as atribuições do conselho fiscal poderão ser remetidas a uma empresa independente de auditoria, de reconhecida credibilidade.

ARTIGO VIGÉSIMO OITAVO**Competências do conselho fiscal**

Compete ao conselho fiscal:

- Examinar a escrita e o conteúdo da associação sempre que o julgar conveniente;
- Elaborar parecer sobre o balanço financeiro anual, contas do exercício e orçamento para o ano seguinte ou sobre os demais assuntos que lhe são remetidos nos termos da lei e das presentes estatutas.

ARTIGO VIGÉSIMO NONO**Funcionamento do conselho fiscal**

O conselho fiscal reúne-se ordinariamente quatro vezes por ano e extraordinariamente sempre que necessário e mediante convocação do seu presidente ou a pedido dos demais membros do conselho de direcção.

ARTIGO TRIGÉSIMO**Executivo permanente**

Um) O director executivo dirigirá um executivo permanente constituído pelo conselho de direcção e os seus membros não podem ser membros da associação.



29 DE MAIO DE 2002

Deix) Compete ao director executivo:

- a) Criar e organizar os serviços da associação mediante proposta ao conselho de direcção;
- b) Exercer a acção disciplinar sobre os trabalhadores;
- c) Praticar os actos de gestão corrente que a lei e os estatutos estatuem não reservados a outros órgãos sociais;
- d) Propor ao conselho de direcção a contratação de pessoal para assumir cargos de direcção, bem como o pessoal técnico permanente;
- e) Elaborar e apresentar ao conselho de direcção os relatórios de actividades e balanço anual;
- f) Praticar os demais actos que lhe forem incumbidos pelos órgãos sociais.

CAPITULO V

Das disposições finais

ARTIGO TRIGÉSIMO PRIMEIRO

Representação

1.ª) A associação fica obrigada por duas assinaturas nos termos das alíneas a) e c) do presente artigo, sendo uma delas obrigatoriamente a do presidente ou vice-presidente, exceto de impedimento do primeiro.

- a) Pela assinatura do presidente do conselho de direcção ou do vice-presidente em caso de ausência ou impedimento daquele;
- b) Pela assinatura de um membro do conselho de direcção a quem tenha sido delegado poderes para a prática do respectivo acto pelo conselho de direcção;
- c) Pela assinatura de um procurador especialmente constituído e nos termos do respectivo mandato.

Deix) os actos de facto expedidos práticos ser assinados pelo director executivo ou por qualquer outro funcionário autorizado para o efeito.

ARTIGO TRIGÉSIMO SEGUNDO

Dissolução e liquidação

Em caso de dissolução a assembleia geral reunida para decidir o assunto a dar aos bens e nomear uma comissão liquidatária para proceder a liquidação da mesma nos termos prescritos na lei.

ARTIGO TRIGÉSIMO TERCEIRO

Símbolos

A associação terá como símbolos um pavilhão aprovado pela assembleia geral que será utilizado nos termos preconizados no regulamento interno.

ARTIGO TRIGÉSIMO QUARTO

Disposição final

Em todo o âmbito vigorará a legislação em caso aplicável vigente na República de Moçambique.

Está conforme.

Mauso, em de Abril de dois mil e dois. —
O Adjunto, Orlando Alberto Milanez.



10.7. ANNEX 7 - References

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