

TOURISM POLICY AND STRATEGY

1 Introduction

Mozambique has the potential to become a world-class tourism destination for regional and international tourism. The possibility to combine one of the finest beach experiences in Africa with the cosmopolitan life of the Country's cities, the excellent opportunities for eco-tourism offered by the diversity of flora and fauna and a rich history and culture offers an excellent base upon which to build a sustainable tourism destination.

The main challenge now lies in the promotion and development of tourism as an engine for economic growth and in the engagement of public and private sector as well as communities in making the delivery of services in the tourism sector a reality. The growth of tourism depends on the long-term vision, on the capacity to evaluate opportunities and understand realities and in the recognition that tourism is a highly competitive international industry that requires planning, investment, strategic alliances and strategic management.

The development of the tourism sector results from the participation and interaction between a broad range of direct and indirect stakeholders. These stakeholders include the State, the Government at national, provincial and district level, municipalities (autarquias), private sector, local communities, international, regional and domestic tourists, non governmental organizations, financial institutions, international development organizations, the media and the general public.

The success of an industry as transversal as tourism depends on the capacity to aggregate the factors that directly or indirectly impact its performance, as well as the capacity to react on challenges affecting this highly competitive and volatile sector. It is expected that all stakeholders will truly be committed to firmly placing Mozambique as a destination on the "global tourism map" through their involvement in proactive, strategic and aligned actions.

The main role of the Ministry responsible for tourism is facilitating and catalysing tourism development. The Tourism Policy will be used and referenced by a wide-range of tourism stakeholders as a means of achieving these goals.

2 Tourism in Mozambique

Mozambique remains in the early stages of its development as a tourism destination and its product base remains largely underdeveloped. Visitor arrivals totalled approximately 400 000 in 2001, this demonstrates a very low utilization compared to registered numbers by countries in the region. There is, however, considerable latitude for growth given that projections of the World Tourism Organization indicate that the region will attract 36 million tourists in 2020.

Whilst the inherent strength of the tourism product portfolio lies across the Country, the industry remains concentrated in the capital city of Maputo, where visitor arrivals account for approximately 60 percent of the total market share. The 40 percent balance is shared across the remaining ten provinces. New product development, infrastructure provision to facilitate access, marketing, investment attraction, conservation of both natural and cultural heritage and human resource development are key agents of change that are required to take tourism to the next level.

3 Tourism as an engine of growth

Tourism is of growing economic importance around the world. It is an industry that in 2001 contributed 4.2 percent to the Gross Domestic Product (GDP) of the global economy and employed 8.2 percent of the world's economically active population. As an economic sector, tourism is one of the few that can deliver growth and employment on the scale required to make a difference in Mozambique, if the development of Mozambique as a tourist destination is managed in a strategic and sustainable way.

Direct benefits associated with tourism as an economic sector include:

- **Income** – in order to satisfy a tourist a wide range of purchases of services and goods, which occur at different times and in different locations, are necessary. The compounded output is potentially significant to an economy.
- **Employment** - tourism is a labour intensive sector that integrates all levels of skills, ranging from the most sophisticated to the most basic, and that involves all social layers. Given its multi-plying effect tourism also impacts positively on employment in other economic sectors.
- **Conservation** – when properly managed, tourism enhances economic viability of protected areas and lessens pressure on the environment.
- **Investment** - the capital intensity of the sector results in a portfolio of investment opportunities for public and private sector.
- **Infrastructure** – the potential and the dynamics of growth combined with the economic benefits associated with the tourism sector dictate the necessity to create and invest in infrastructure.
- **Prestige** - international prestige and ultimately a place on the destination “wish list” has positive commercial as well as economic implications.
- **Creation of small businesses** - tourism is linked directly and indirectly to a diversity of economic sectors and therefore creates small business opportunities throughout the economy.

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

- **Social impacts** - changes in life-style resulting from migration of workers, to change in culture, from increases in crime rates, to prostitution etc.
- **Environmental impacts** – irresponsible project development as well as an influx of tourists in a sensitive and fragile environment can destroy the balance of nature.
- **Leakages** – the occurrence of outbound monetary flows, resulting from the import of goods and services, international promotion and advertising, commissions to foreign sales agents, salaries of foreign personnel, repatriation of profits etc., represent a loss of contribution to the economy.
- **Over-reliance** - tourism is volatile, and responds quickly to negative influences like political disturbances, terrorist attacks, natural disasters etc.

The countless opportunities created through tourism are counter-balanced by the number of threats, many of which beyond the control of the State and/or unavoidable. However, responsible planning, development and management by public and private sector can serve to minimise losses incurred and ensure the continued growth and development of tourism. The National Tourism Policy aims to maximize the benefits associated with tourism whilst minimizing and, where possible, eradicating negative impacts.

4 The drivers of Tourism

For Mozambique to participate in global tourism and move forward as a strong destination, greater account must be taken of the future drivers of tourism growth, including trends in product and market development, globalisation, real estate investment and project design. Without such a view it will be difficult to fulfil the objectives and meet the expectations of Mozambican society, even with the inherent potential of the country.

4.1 Product Lines

It is forecasted that the future growth in worldwide tourism will focus upon the following product lines: sun, sand and sea; eco-tourism; cultural tourism; adventure tourism; thematic tourism and cruise tourism.

Sun and sand holidays will continue to play a major role in future tourism patterns. Mozambique has a vast, beautiful and unexplored coastal asset. The current and future importance of this product line and the progress made globally in resort planning and development offers exciting opportunities to the Country. Mozambique also has an opportunity to achieve competitive advantage by maximising linkages between the coast and its wildlife, culture and adventure product. These linkages are likely to define the competitive edge of Mozambique as a tourism destination.

4.2 Globalisation

Tourism businesses and destinations that thrive in the future will either be global players competing with brand power and economies of scale, or they will be small actors with a clear focus and specialised products, able to survive because they have little competition and understand their products far better than global players. Many African destinations are currently operating as niche players, primarily promoting wildlife as their unique selling point. However, only being a niche player is not sufficient for the Country to create required economic and social benefits. Mozambique has to focus and prioritise the delivery of a mix of projects that will make it a global player and create the environment for different scales of project development.

4.3 Horizontal and vertical integration

International trends move from horizontal integration towards vertical integration. Such companies have the power to direct international tourism flows and lead the market to new destinations. Mozambique should work with these market leaders to identify and package appropriate projects. Such projects are expected to influence demand levels contributing to growth in visitor numbers and tourism spend while also serving as “anchors” for broader tourism development.

4.4 Direct Foreign Investment

The attraction of Foreign Direct Investment (FDI) is a priority for the development of the tourism industry. FDI will contribute towards an increased share of Mozambique in the international tourism market. To realize this objective, an increased understanding of international investor market requirements and investment trends and a proactive response to these will be necessary.

4.5 Technology

Electronic technology will continue to revitalise the travel and tourism sector in the next decades. Today, consumers have instant access to information. This is important to tourism and travel, as products in many instances do not exist where they are purchased. Consumers are adopting online distribution channels as their preferred way of buying travel products. It is this ability to “shrink” the world that is particularly beneficial to tourism.

5 General principles of the Tourism Policy

The Tourism Policy results from an interactive dialogue between various stakeholders, who, one way or the other, impact on the tourism industry and on the long term on the development of tourism in the Country. The identified principles that will guide tourism development are the following:

- Establishment of an institutional framework, planning and control mechanisms and an active participation in the creation of an enabling environment for the development of tourism;
- Recognition of the private sector as the driving force in the development of the tourism sector;
- Promotion of partnerships between public and private sector and communities in the development of the sector;
- Integration of tourism into the overall development policy, planning and strategy of the Country;
- Adoption of sustainable tourism planning principles and effective approaches to implementation;
- Planning and coordination of tourism markets, products and tourism infrastructure at national, provincial and district levels;
- Assumption of responsibility by Government at national, provincial and district levels to set and monitor standards for the development and quality of tourism;
- Awareness creation about the importance of tourism and the value of the natural and cultural heritage;
- Training and skill-enhancement at various skill levels across the sector with a view to increase quality in tourism delivery and to meet quantitative market demands;
- Promotion of an effective involvement of communities in development programs;
- Preservation of cultural values and national pride as a way to valorise the tourism product;
- Strengthening of tourism through sustainable development practices and respect for the environment;
- Integration of tourism in the context of international cooperation;

6 Objectives of tourism

Tourism objectives are established to balance economic interests with socio-cultural and environmental considerations. The overall objectives of the tourism policy are:

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

To support the overall objectives, specific objectives in the following areas have been established:

6.1 Economic

The main economic objectives related to the development of tourism in Mozambique are:

- to position tourism as a major economic growth engine and to harness its multiplier effects for employment creation and poverty alleviation;
- to create a conducive investment climate in tourism;
- to develop a diversity of destinations, products, attractions and markets in order to minimise exposure of tourism to major internal and external threats;
- to contribute to the development of local economic opportunities and minimise leakages;
- to provide opportunities for the diversification of the economy and for the creation of small, medium and micro business enterprises and associations; and
- to strengthen domestic inter-sectorial economic linkages, thereby reducing the import content of goods and services related to the sector.

6.2 Social

The main social objectives related to the development of tourism in Mozambique are:

- to alleviate poverty;
- to contribute to the national unity;
- to promote education, training and awareness creation in tourism and related areas;
- to ensure that Mozambicans have access to travel opportunities and tourism attractions;
- to encourage the active participation of Mozambicans in tourism planning, development and management;
- to promote the conservation of cultural patterns and traditions and their artistic expressions and places of historical and cultural importance;
- to cultivate a sense of ownership about the value and identity of the tourism product;
- to minimise any potential adverse social impacts of tourism.

6.3 Environment

The main environmental objectives related to the development of tourism in Mozambique are:

- to ensure that tourism and the environment are mutually supportive;
- to promote a proactive approach by all tourism stakeholders to develop, market and manage the sector in a responsible and integrated manner;
- to prioritise the preservation of the quality and sustainability of biodiversity;
- to contribute to the rehabilitation, conservation and protection of eco-systems and natural heritage;
- to promote the development of natural resources, especially those that possess an ecological and historical value in a recreational, aesthetic and/or socio-cultural way.
- to make Mozambique a prominent player in responsible environmental practices.

The realization of the objectives defined in this policy leads to the establishment of the priority areas for intervention and action.

7 Priority Areas for Intervention

The following are the identified priority areas for intervention:

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

7.1 Integrated Planning

The tourism sector is a complicated inter-related system of demand and supply factors, physical and institutional elements. The functioning of such a system largely depends on the level of interaction and integration that exists between its components. The planning of tourism should therefore be recognised as an integrated, flexible and continuous process. This approach of integration is not limited to the tourism sector, but effects as well development policies and systems at national, provincial and district levels.

For a sustainable growth and a balanced development of tourism, it will be necessary to promote, wherever possible, detailed plans for land-use especially in areas with high potential for tourism development.

The Government advocates decentralized planning procedures for tourism development that will lead to the effective integration of tourism in overall plans.

7.2 Access to Land for Tourism Development

All land in Mozambique is owned by the State. The dimensions of the area and the terms of concessions for the right of land-use are granted according to the characteristics of each individual project and in a way that encourages a proper performance of the investor and discourages speculation.

In the issuing of land-use concessions for the installation of tourism establishments, administrative procedures and mechanisms for land allocations will take into account that the terms of the concessions should positively contribute towards economic, environmental and social returns.

Whenever possible, in strategic zones for tourism development, in urban zones as well as in areas with a high potential for tourism, land will be reserved exclusively for the development of tourism and related projects.

7.3 Infrastructure and Public Services

Infrastructure is fundamental to tourism and provides the physical linkage between demand and supply. In this context, infrastructure linkages between and within areas of tourism potential are essential. Tourism encourages infrastructure construction, while infrastructure on its turn serves as a catalyst in the development of other economic activities.

Mozambique is a developing country, covering significant landmass, where infrastructure plays an extremely important role. It is important to recognize that, although tourism is currently not in a position to lead infrastructure delivery in Mozambique, the sector does have a significant influence. The fact that tourism is not a stand-alone sector, but rather is inherently linked to other economic sectors points to a requirement to adopt an integrated approach to infrastructure planning and delivery, actively involving tourism.

7.4 Sustainable and Responsible Tourism

Mozambique's tourism potential is largely based upon attractions offered by nature. Tourism must be managed in an environmentally, economically and socially sustainable manner that preserves the biodiversity, and ensures the sustainability of the natural and cultural environment.

The non-sustainable use of natural resources in areas with tourism potential constitutes a major pre-occupation of the Government. These activities that threaten the future of tourism include excessive fishing and poaching, destruction of dunes and coral reefs, the extinction of certain species and sensitive eco-systems, caused by incompatible and uncontrolled activities and behaviour. Some of these impacts are caused by behaviour resulting from a low awareness about the value of natural and cultural resources and the need to preserve them.

The strategic vision taken to the management of natural resources, will largely determine the long-term sustainability of the Country's resources as a tourism destination. Government is committed to tourism development that is underpinned by sustainable development practices and respect for cultural values.

7.5 Conservation Areas for Tourism Purposes

Mozambique is a country with a high development potential for eco-tourism. The identification of areas with high biological value such as transfrontier conservation areas, future natural world

heritage sites, interior lake eco-systems, wetlands and montane and coastal areas must be considered as a priority for both tourism development and conservation.

The current status of infrastructure and the headcount of wildlife in Mozambique are required to improve to support an increase in tourism investment. Wildlife populations have decreased dramatically and restocking is therefore a priority. Although restocking has been initiated, it will take several years for wildlife numbers to recover to the desired levels. In order for Mozambique to become a regional player in the wildlife and eco-tourism arena, the Government will pay special attention to elevate the actual status of development in the Country's conservation areas. Measurements towards this objective will take into consideration the resources and level of competitiveness in the region in terms of infrastructure, accommodation, services, markets and the existing management capacity.

The Government, in coordination with entities that directly or indirectly influence the management of natural resources, will promote adequate mechanisms for the involvement of local communities in management processes of natural resources.

Capacity building and involvement of community members in the management and control of natural resources in conservation areas is a priority in order to guarantee the sustainable development of tourism.

The Government intends to utilise conservation areas as a key resource in the development of the national tourism product. Investments will, therefore, be necessary for the rehabilitation of infrastructure and for the restocking of wildlife in these areas.

Aiming at maximizing gains, special importance will be given to the strategic alliance between conservation and tourism development. Resources will be made available for private investment promotion in conservation areas, as well as for the promotion of tourism related activities that contribute to the development of local communities inside these areas, namely in national parks and reserves, official hunting areas, game farms and community-based projects.

7.6 Product Development

A clear identification of product opportunities and market requirements highlight strength and weaknesses, enable appropriate market positioning and product development strategies and therefore maximise resource allocation. It also focuses spatial planning and identification of investment opportunities.

The key product opportunities for Mozambique are: Sun, sand and sea; water-sports; eco-tourism; adventure; culture; entertainment and trade and investment. These products are based upon three broad themes:

- Water-based tourism experiences;
- Nature based tourism experiences; and
- People and urban environment based experiences.

These themes will also provide the platform for product development and national tourism marketing.

In order to compete internationally Mozambique must upgrade its current provision of products and services and aim new product development at international standards.

Mozambique covers a significant land mass and the spatial spread of product strength means that tourism can play a significant role across the Country. There is a requirement for the creation of

critical mass through focus on identified product lines and spatial emphasis on clustering and linking attractions as well as facilitating easy access.

The Government will take into consideration areas for tourism development targeted at a broad range of international, regional and domestic markets, and allocate resources accordingly.

7.7 Valorisation of Cultural Heritage

Tourism can be a tool to preserve cultural values and to increase national civic pride in culture and heritage by embracing the direct and indirect utilitarian values, recreational and aesthetic values and intrinsic spiritual and ethical values of cultural assets. Mozambique has a rich and unique cultural diversity.

Its people and the tangible and intangible historical-cultural heritage inform Mozambique's cultural identity that implicitly adds value to the Mozambican tourism experience. Strategic positioning of cultural elements alongside the nature based tourism experiences (e.g. beach, wildlife, scenic beauty) will build the strength of Mozambique as a tourism destination.

The Government promotes an effective management of the cultural resources of Mozambique that will increase the awareness among nationals and tourists about cultural values and places of historical and cultural importance and will position culture as a key feature in the tourism experience.

7.8 Tourism Marketing

Marketing is an important instrument for tourism growth. To position Mozambique as a world-class destination, major efforts should be focused towards effective destination marketing in domestic, regional and international markets.

In association with improved product and infrastructure provision, the marketing effort must emphasize the position of Mozambique as an accessible, exciting, exotic, warm, vibrant, high quality destination offering a multitude of wonderful and differentiated experiences. These include highly valued natural resources, engaging leisure environments, a rich and diverse culture and history as well as friendly people.

Marketing is a complex process that must be undertaken as a parallel process to product development. The Government will promote adequate institutional arrangements aiming to establish a renewed focus on marketing. It will at the same time, however, recognize that marketing is a complicated, specialist activity and that it will be necessary to engage partners in the private sector in order to optimise the use of available resources and expertise.

7.9 Human Resources Development and Training

Training and education in tourism, conservation, hospitality and related, are fundamental to the development of tourism in Mozambique. A weak technical capacity can constitute a threat to the growth of the sector. If tourism grows at the current rate there will not be sufficient trained staff to meet market requirements. Accelerated growth as a result of enhanced product development and improved marketing will provide additional challenges.

The Government intends to optimise the potential of all participants in tourism through a system of ongoing education and training, and by means of accessible and sustainable learning courses and programs provided by officially accredited institutions, established according to regional and international standards.

7.10 Community Involvement

Central to the future growth of tourism in Mozambique is the structure of the sector in terms of: ownership, community involvement, employment of nationals across different professional levels, investment opportunities for national investors and education and training programs geared towards human resource development.

The Government intends to promote an increased participation of Mozambicans in tourism as employees, investors, operators and service providers.

7.11 Social Development

The domestic market represents a significant share of the potential tourism market to Mozambique. The contribution this market can make towards the growth of the sector is significant. The development of a diversified domestic market is also an important social objective of tourism development in the Country. Therefore, the development of facilities and services at affordable prices and the dissemination of information to nationals will be necessary. Priority should be given to the divulgation and marketing of the Country's tourism products and the historical, cultural and natural heritage among the domestic market.

If not well-managed and controlled tourism can be associated with less desirable impacts on society. Social impacts may include changes in the quality of life of local residents, increases in crime rates, loss of cultural values and traditions and increases in prostitution etc. The Government will favour the promotion of responsible forms of tourism and a development based upon integrated planning, awareness creation among and information supply to local populations, and the strict observance of norms defined by master plans.

The Government intends to promote investment in social development through tourism. As part of this focus, emphasis is placed on promoting social inclusion, whilst at the same time minimising negative impacts on the social environment that possibly can be caused by tourism.

7.12 Financing

The development of the tourism sector depends on the ability of the Country to attract investment and to effectively involve Small, Medium and Micro Enterprises (SMMEs) and communities in the development and commercialisation of tourism products and services. The available Government funding for planning, management and institutional capacity building at national, provincial and district levels remains limited. In order to implement the strategy for the development of tourism, increased financial means will be necessary.

It is the intention of the Government to encourage the participation of national investors, SMMEs and community initiatives in tourism through the creation of an enabling financial framework that incentivises the establishment of financial institutions and facilitates access to credit-schemes and funding. The Government also recognizes its obligations towards the allocation of Government budget towards tourism planning, the establishment of institutional structures related to tourism and towards the provision of basic facilities. It also commits to create an enabling environment for Foreign Direct Investment (FDI).

7.13 Priority Areas for Tourism Investment (PATI)

The vastness of the Country and the scarceness of its resources point out the necessity to prioritise and temporarily hierarchise areas for the development of tourism. This approach aims to maximise the available opportunity and the development of a sustainable tourism product.

These areas (PATI's) represent areas of focus for the Government in terms of investment promotion, prioritisation in resource allocation for the development of tourism, human resources, infrastructure provision and environmental protection. The approach to tourism development within PATI's will be in line with international practices with regard to responsible tourism development and the promotion of investment opportunities. The areas within the PATIs will form the core of the strategy aimed at maximizing the results for tourism development.

7.14 Regulation and Quality Control

An adequate performance of the tourism sector relates to various specific regulations relating to the standards, licensing requirements and inspection procedures for hotels, restaurants, travel agencies, tour guides and other tourism enterprises. Related laws and regulations, such as public health, sanitation and fire codes, building codes, facility operating regulations, liability laws relating to guests and their belongings and labour and taxation legislation, are also important for the development and management of tourism in the Country. Regulations on transportation services and facilities also directly affect tourism operations. Special attention is given to the legal designation and planning of conservation areas.

The Government intends to promote the development of the sector based upon a regulatory framework with focus on specific areas. Tourism will engage with relevant government authorities in order to ensure that the requirements of the regulatory framework necessary for its proper functioning are met.

In order to develop realistic and workable solutions, the private sector, through appropriate mechanisms of participation, will be involved in the process of the definition of norms and regulations.

8 Organizational Structure

The transversal nature of the tourism sector implies that various ministries, institutions and bodies from public as well as the private sector have strong ties with the development process of activities in this industry. The management of conservation areas for tourism interests is a central responsibility in the administration of the sector.

8.1 The Responsible Ministry

The ministry responsible for tourism has the responsibility to promote the development of the tourism industry in the Country and the responsibility for the management and coordination of policies related to tourism, as well as the management of conservation areas from a tourism point of view.

8.2 The Inter-sectorial Coordination Body

The transversal character of the industry requires the development of an adequate platform for inter-institutional coordination. The establishment of an inter-ministerial body for the sector, whose key function is the coordination and guidance of tourism development as well as the establishment of inter-sectorial linkages with the aim to facilitate and increase tourism flows and arrivals into the Country, should be guaranteed.

8.3 The Tourism Fund

The Government should play a facilitating role in the development of tourism, in particular relating to the support of capacity building among national companies and local communities in their role as providers of tourism services.

To execute this role, the Government will create specialized funds which main function is to provide technical and financial support to organizations and individuals who intend to carry out tourism or related projects.

8.4 Bodies for the Promotion of Development in Priority Areas for Tourism Investment

These are institutions or entities with specific responsibilities relating to the promotion of projects and investment in tourism in areas considered as strategic for the development of tourism, with emphasis on the active involvement of communities and the civil society.

8.5 Municipalities

The municipalities play a critical role in the development of tourism in urban centres. Their intervention relates especially to physical planning conform the principles established in this policy.

8.6 Consultative Bodies

8.6.1. Counselling Body for Tourism Matters

In the light of the establishment of a platform for participative involvement, reflection and alignment of the interests of the different entities that interact in the process of tourism development, a consultative body that integrates various entities with recognized experience and expertise in the sector, will be created. The main role of this body will be to provide the sector with specific recommendations about issues related to the policy and its implementation.

8.6.2. Body for the Coordination of Tourism Promotion

With the objective to coordinate tourism promotion activities and to promote synergies between the parties interested in the development of the sector, a multi-sectorial body will be established that integrates entities representing the public and private sector and that through its experience, capacity and interest in the sector, facilitates in the execution of activities related to the promotion of the national tourism product. The responsibilities of this body, will, amongst others, include the program of promotional activities, the identification and mobilization of financial resources for the execution of the programs and the further definition of the marketing strategy of the Country.

8.6.3. Local Tourism Bodies

For an active and consistent participation in the development process of tourism, residents in the priority areas for tourism investment should constitute themselves in local tourism bodies. These local tourism bodies are associations that integrate economic agents and community leaders of the concerned areas, representatives of NGO's that operate in the area and other entities that for

various reasons are recognized as influential in the socio-economic development of the area. The objectives of these bodies, among others, are to represent the residents in relation to plans for the utilization of the area for tourism purposes, to promote actions that improve the physical appearance of the area and to create awareness among residents about how to benefit from tourism.

STRATEGY FOR THE DEVELOPMENT OF TOURISM

9 Key Strategic Directions

In order to implement the objectives and principles established in the Policy, the Government adopts the following strategy:

9.1 Relating to Integrated Tourism Planning at National Level

- Support tourism as a strategic economic sector in the national interest, influencing the different actors and making sure that all stakeholders are considering the requirements for tourism;
- Enhance tourism development opportunities in synergy with opportunities that are offered by regional development initiatives (e.g. Spatial Development Initiatives, Development Corridors, Transfrontier Conservation Areas, etc) as a way of promoting international and sectorial initiatives in both social service delivery and poverty reduction initiatives;
- Promote tourism as a priority sector for international cooperation intervention and external assistance and funding;
- Ensure that provincial tourism development plans and strategies are aligned;
- Identify the requirements for tourism in overall economic, social and environmental development policies and plans; and
- Engage private sector and communities as appropriate in order to ensure their involvement in tourism development.

9.2 Relating to Integrated Tourism Planning at Provincial and District Level

- Make sure that the support, control and co-ordination of planning at provincial and district levels will be provided by the provincial government;
- Prepare a tourism development plan for inclusion in the provincial development frameworks, plans and action programs and in national tourism plans;
- Engage private sector and communities in order to ensure their involvement in tourism development; and
- Ensure the inclusion of tourism development plans as appropriate in the formulation of land development objectives, land uses and area zoning.

9.3 Relating to Zoning

- Prioritise areas for tourism development and prepare appropriate land-use plans in consultation with local communities. The prioritisation of tourism in strategic areas does not exclude the possibility that other types of land-use will exist in these areas, but merely that there will not be incompatible activities and interests;

- Develop Master Plans that include zoning and define standards for the Priority Areas for Tourism Investment; and
- Ensure that, in the whole country, tourism development is in accordance with local development and land-use plans.

9.4 Relating to the Use of Land for Tourism Purposes

- Encourage long term land-use concessions for tourism projects with long-term sustainability in order to maximize tourism impact and avoid short-term exploitation;
- Allocate non-capital intensive projects and projects that make an intense use of natural resources (i.e. camping sites, caravan parks, etc) towards less vulnerable ecological zones;
- Non-capital intensive projects which are located in identified prime tourism should be given short-term land-use concessions that are subject to periodical reviews; and
- Discourage land speculation through the adoption of measurements that rigorously monitor the terms and conditions established in the land-use concessions.

9.5 Relating to Road and Ground Transportation Services

- Identify the requirements of tourism regarding road provision and access and promote their delivery;
- Support the expansion of the range of transportation services, such as taxi's, car hire companies, coach operators, ground handler operations; and
- Encourage the development of a road signage system in accordance with international standards that includes tourism signs.

9.6 Relating to Air Services

- Support strategies that link tourism to commerce through integrated planning and delivery of services for tourism, freight and people movement;
- Promote a national, regional and international air network to service tourism in Mozambique;
- Encourage a healthy and competitive national air industry that encourages the entry of new national, regional and international players; and
- Encourage partnerships between national and strategic regional and international players and facilitate bilateral air agreements with other countries for scheduled and charter flights.

9.7 Relating to Rail and Sea Transport

- Strengthen the linkages between tourism and other economic sectors through the use of rail and sea transport infrastructure;
- Encourage the development and rehabilitation of ports in support of cruise tourism and waterfront development for tourism purposes; and
- Support the rehabilitation of the rail network and maximize regional linkages that impact positively on the growth of rail tourism.

9.8 Relating to Public Services

- Support the provision of tourism information centres at strategic locations that will disseminate information to visitors, influence visitor distribution and consumption patterns and raise the profile of local destinations;
- Promote efficient procedures for the management of tourist movement including the adoption of measurements that facilitate increased visitor arrivals from the key generating tourism markets to the Country;
- Promote procedures that support the protection of tourists in collaboration with competent organizations and authorities;
- Define a strategy for inter-sectorial coordination aimed at the generation of an increased movement of tourists towards the transfrontier conservation areas;
- Establish coordination mechanisms for the management of tourism flows that draw upon tools for management and control of visitor movement as well as their behaviour; and
- Ensure the processing of statistical information relating to tourism movement in hotels and other establishments as well as relating to visitor arrivals;

9.9 Relating to Sustainable Tourism

- Establish guidelines for sustainable and responsible tourism with particular emphasis on activities in sensitive eco-systems; and
- Apply sound tourism planning principles, such as concentration or clustering of tourist facilities/products in certain zones with an objective to create manageable areas of tourism development and therefore better focused environmental management systems.

9.10 Relating to Legislation and Control Measures

- Ensure legislation and control measures are in place that are in line with the implementation of the overall principles and objectives for tourism development and conservation of biodiversity;
- Integrate environmental and conservation objectives in the licensing process of tourism facilities and activities; and
- Establish norms for the construction of tourism establishments and define control mechanisms that ensure that tourism development is conform standards and set requirements;

9.11 Relating to Impact Assessment and Management

- Ensure that investors, during the project development process, conduct environmental impact assessments as part of tourism development plans and that they supply, in accordance with the law, adequate information about the potential environmental impacts of their project proposals;
- Ensure monitoring of approved tourism developments and activities and in case of non-compliance take appropriate actions for the re-establishment of appropriate standards;
- Implement measures aimed at reducing environmental impacts caused by the inappropriate use of natural resources, by pollution and by the generation of wastes, ensuring the responsible use of natural resources (e.g. land, soil, energy, water); and

- Involve the public and private sector, community representatives, non-governmental organizations and other relevant organizations in the monitoring of environmental impacts.

9.12 Relating to the Sustainable Use of Resources

- Promote the use of local materials in construction, in the equipment of tourism establishments and in the production of food and beverages;
- Ensure that tourism operators and/or traders support the conservation of flora and fauna, of the natural habitat and of species in danger of extinction, discouraging the non-sustainable use and destruction of eco-systems;
- Guarantee the development and implementation of management plans for conservation areas that includes zoning for tourism operations with the objective of minimising environmental impacts;
- Implement effective enforcement measures in order to guarantee the conservation of biodiversity;
- Promote the development of natural resources management programmes in participation of local communities based on management plans, zoning and clearly defined mechanisms for land allocation;
- Identify areas of biological importance with tourism value that can be incorporated in the conservation areas network.
- Promote a sound development and management of the transfrontier conservation areas;
- Promote the establishment of a decentralised and flexible administrative management system for the conservation areas; and
- Promote inter-institutional coordination with the aim of developing technical capacity in the management of conservation areas.

9.13 Relating to Investment Promotion

- Establish mechanisms that facilitate the attraction of investment in tourism in conservation areas;
- Identify conservation areas for investment in the short, medium and long term, taking into account the level of infrastructures already in place, access, the value of the tourism attractions, the variety of wildlife resources as well as the prevalence of the 'Big Five' and the proximity to markets;
- Maximize the capacity to mobilize international and regional financing sources with the aim to increase the available government budget to finance the development of tourism.

9.14 Relating to the Priority Areas for Tourism Investment

- Identify Priority Areas for Tourism Investment (PATIs), which represent key areas of focus where resources will be channelled in support of strategic product and market development.
- Maximise potential of achieving a competitive advantage as a tourism destination through realizing strategic bush/beach linkages.
- Prioritise the attraction of investment for the development of well-planned, integrated quality resort destinations;

- Promote development of urban tourism in Mozambican towns and cities, thus positioning these service centres as gateway destinations in line with PATI criteria;
- Support the identification of the financial requirements of the institutional bodies responsible for the detailed planning and for the implementation of the Priority Areas for Tourism Development (PATI's);
- Create a legal framework that facilitates the intervention of the private sector and local communities in the conservation areas, with the aim to capitalize upon the potential of these stakeholders for the auto-sustainability of the conservation areas from a tourism point of view; and
- Ensure that investments in tourism are made in the zones identified for this purpose in accordance with zoning plans;

9.15 Relating to Product Diversification

- Promote the development and promotion of a mix of key tourism products in terms of scale (large, medium and small), differentiation and location;
- Promote the development of a mix of key tourism product lines which include sun, sand and sea, water sports, eco-tourism, culture, entertainment, urban based tourism and trade and investment;
- Promote the development of a range of special interest and activity products based upon Mozambique's key cultural, natural and marine assets, such as:
 - marine resource based activities;
 - eco-tourism and adventure based activities;
 - urban tourism;
 - cultural products and services;
 - community based tourism;
- Develop international, regional and domestic business tourism through the promotion of trade and investment; and
- Enhance the attraction of the MICE market (meetings, incentives, conferences and exhibitions) by promoting investments and facilities such as convention centres and exhibition halls in key urban centres.

9.16 Relating to Domestic Tourism

- Promote and support the provision of affordable products and services that are targeted at segments of the domestic market; and
- Promote religious tourism and the development of products targeted at diversified domestic market segments, such as youth, elderly people and economically vulnerable people;

9.17 Relating to Cultural Heritage

- Ensure that planning and development for tourism will take account of any impacts on cultural resources; and
- Actively support the development and maintenance of a portfolio of cultural products such as museums, theatres, workshops for local art, cultural events, historical and archaeological sites, historic buildings etc, exposing them to both residents and tourists;

9.18 Relating to Community Involvement

- Support the involvement of communities in the management of tourism products and resources and of the cultural heritage;
- Instigate customs such as local cuisine and the production of typical clothing as well as promote the expression of the performing and visual arts in the various communities;
- Avoid exploitation of certain indigenous cultural expressions such as religious ceremonies and traditional rituals and control tourist viewing of these, assuring appropriate respect is paid;
- Educate residents about tourism – its concepts, benefits, problems, policies and programs and how they can participate in tourism; and
- Dissimilate to tourists information regarding the untouchable culture of the various communities, with an aim to educate them about courtesies and respect to observe in their behaviour;

9.19 Relating to Tourism Marketing

- Increase visitation, length of stay and tourism revenues through targeted domestic, regional and international marketing;
- Research, identify, prioritise, develop and grow key target markets;
- Target and develop domestic tourism markets with the objective to cultivate national civic pride and to increase the understanding of the national historical, cultural and natural heritage;
- Actively target niche or special interest markets such as cruise markets, scuba-divers, archaeologists, birders, honey-mooners, back-packers, etc.;
- Target Mozambicans living abroad as a key market segment;
- Dissimilate tourist information about the Country to international and regional markets as a proactive means of achieving a greater understanding and appreciation;
- Establish a marketing body at national level, tasked with co-ordinating the marketing, promotional and sales initiatives of the Country's image in regional and international markets;
- Leverage private sector involvement in destination marketing through appropriate institutional arrangements that encourage their participation;
- Establish a research function that allows the collection, synthesis, interpretation and dissemination of tourism related data and information;
- Encourage provincial and district level marketing initiatives that contribute to overall destination positioning and promotion of product quality;
- Establish tourism information centres in strategic locations, in particular along the development corridors in partnership with private sector; and
- Establish offices or general sales agents in key and selected source markets with the objective to actively promote the Mozambican tourism experience.

9.20 Relating to Human Resources Development

- Ensure that tourism has an adequate supply of qualified personnel by assessing needs and developing a Human Resource Development Strategy and Action Program. These plans must also adequately address needs of related relevant ministries and private sector;
- Encourage employers to invest in the education, training and development of employees in conjunction with national training institutes;
- Assess and inventory together with private sector the training needs of travel and tourism and ancillary services;
- Ensure that a balanced mix of education and training at various levels will be offered, in accordance with market demands;
- Promote the establishment of institutes for the provision of education and training in tourism, hospitality and conservation by nationally accredited organizations;
- Promote active involvement of private sector in tourism training and education;
- Support programs geared towards education and training in environmental conservation and protection;
- Improve training as relating to communication skills and optimum utilization of technology;
- Improve access to training opportunities and promote equal opportunities for all interested parties through e.g. scholarships, incentive schemes for training institutions, internships and placements with tourism industry;
- Create public/private partnerships responsible for needs assessments, planning and implementation of the labour requirements in the tourism industry;
- Establish funding mechanisms for tourism training and education;
- Support the establishment of appropriate institutional arrangements and programs that facilitate training, education and technical assistance in tourism and related areas;
- Support the involvement of the private sector, already established in the Country, in the provision of technical assistance to local tourism companies with an aim to develop technical and managerial capacity;
- Participate in initiatives that aim to reduce the reliance of imported labour in the tourism sector;
- Develop strategic partnerships with relevant providers of regional and international hospitality and tourism education and training providers as well as internationally recognized tourism education centres; and
- Participate in initiatives of various Government institutions relating to training and education in tourism.

9.21 Relating to Awareness Creation about Tourism

- Promote an increased awareness among communities and the general public about tourism and conservation;
- Encourage local media and NGOs to become partners in tourism education and awareness process in Mozambique;

- Promote an increased awareness of tourism among children and adolescents through the inclusion of a course on tourism at primary and high school levels in order to cultivate a tourism culture at the earliest stage of the education process;
- Increase the knowledge of Mozambicans about the economic and social benefits of tourism;
- Invest in social development through the supply of tourism education, awareness creation programs and capacity building programs targeted at communities and the general public; and
- Promote the divulgation and implementation of the policy and strategy for the development of tourism.

9.22 Relating to the Promotion of Local Ownership

- Support and enhance the growth of local tourism business opportunities;
- Prioritise and actively encourage local ownership of tourism businesses and new investment opportunities;
- Promote the participation in tourism by local communities by influencing the provision of both technical and financial assistance, focusing community leadership in decision making and creating a platform for developing strategic partnerships;
- Support partnerships between community initiatives and formal sector to maximise opportunities for community-based tourism; and
- Encourage finance institutions to provide local tourism entrepreneurs and community initiatives with access to capital.

9.23 Relating to the Promotion of Economic Linkages

- Promote the purchase of locally made goods and the use of services provided by local companies or the local population wherever quality, quantity and consistency permits; and
- Support economic measures that expand both regular jobs and casual earning opportunities in tourism and related sectors, in order to enhance participation by and benefits for Mozambicans.

9.24 Relating to Social Inclusion

- Promote and support the development and provision of diversified products and services that are affordable by the domestic market;
- Promote a greater participation of youth in tourism in particular as relating to training, job creation and recreation;
- Promote the status, rights and role of women in tourism and promote their active participation;
- Utilise the experience and knowledge of the elderly for the benefit of tourism development in combination with the benefit of developing society; and
- Support the provision of tourism facilities and amenities that the disabled and handicapped have access to – aiming to avoid possible discrimination against this target group.

9.25 Relating to Prevention of Adverse Social Impacts

- Support the enforcement of law and processes to control and suppress offenders of the law, especially as relating to crime and violence committed towards tourists;
- Support the strict enforcement of rules and laws aimed at controlling admittance of minors into night-clubs, discotheques and bars;
- Support the strict enforcement of laws aimed at preventing, suppressing and punishing offenders who violate children and/or women's rights;
- Work together with transitional and international governing bodies that help combat the sexual and commercial exploitation of children;
- Educate the tourism industry about the potential threats of child-sex tourism and the important role they must play in educating their clients about child prostitution, reporting child prostitution when they see it and applying correct ethics that Mozambique supports; and
- Ensure negative social impacts through tourism are minimised by advocating ethical standards that preserve societal values, beliefs and norms.

9.26 Relating to Infrastructure Development

- Identify key infrastructure requirements for tourism development;
- Leverage private sector through investment in accelerators to project delivery such as road, air, rail or sea required to “open” areas. Such investment must also benefit the local communities and meet clearly defined cost/benefit criteria; and
- Promote public investment in parks, national reserves, museums, historic sites, and where possible develop private/public partnerships in the development of infrastructure that are of mutual benefit.

9.27 Relating to Private Sector Investment Promotion

- Create a platform for promoting and attracting national investors into tourism development;
- Attract foreign direct investment particularly in the development of major catalytic projects;
- Encourage the development of strategic partnerships between national and international investors; and
- Support investment that will create employment and that will result in the transfer of skills and technology to nationals.

9.28 Relating to Access to Finance for SMME's and Communities

- Encourage the financial sector to facilitate access to credit schemes for SMMEs and community initiatives in tourism; and
- Support the functioning of the tourism fund and assist in the building of institutional capacity to ensure its sustainability.

9.29 Relating to the Setting, Application and Development of Standards

- Ensure that specific standards are developed and applied to all tourism specific and tourism-related activities in order to ensure sustainability and growth of the sector.

- Support the development and functioning of a system of classification and grading for hotels, lodges, permanent camps and safari operations;
- Define a system of licensing and regulations for tour operators to ensure that operators are well qualified and have adequate resources given the nature of their activities and conform to an acceptable code of conduct;
- Effectively engage private sector in the development of specifications and control of standards; and
- Support the development, implementation and control of guidelines for architectural development that ensures an effective and integrated landscaping.

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