



Republic of Mozambique
Ministry of Tourism

Tourism Development Plan for the Parque Nacional das Quirimbas

A general overview for investors



Cover photos © Richard Tapper

Examples of tourism facilities and activities on the islands, coastal and inland areas of the Parque Nacional das Quirimbas and its buffer zone. Photos, including examples of high-end and mid-range tourism, and community-based tourism, taken at Guludo, Matemo Island, Ibo, Mahate, Mareja, Taritibu and Londo.

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Technical record of the Investor Pack for Tourism Development in the Parque Nacional das Quirimbas:

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Note:

This general overview for investors summarises key parts of the Tourism Development Plan for the Parque Nacional das Quirimbas concerning tourism development by investors. Investors are advised to refer to the PNQ Tourism Development Plan, official and for more detailed information about investment opportunities, requirements and regulations governing tourism in the PNQ and its buffer zone.

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Introduction

This guide is an introduction for potential investors to the tourism development **opportunities** in the Parque Nacional das Quirimbas (PNQ) and the important **environmental and other regulations** that cover tourism development. It is intended to help investors to make a quick **assessment** whether or not to shortlist the PNQ as a potential investment location.

Interested investors are advised to refer to the PNQ Tourism Development Plan for more detailed information about opportunities, requirements and regulations governing tourism in the PNQ and its buffer zone. This is available from the offices of the PNQ Administration.

The PNQ Tourism Development Plan includes the park's phased development strategy and outlines specific procedures for tourism developments in the PNQ. The PNQ Tourism Development Plan (PDT) supplements, and does not replace, national legislation and regulations relating to investment and development procedures that apply generally in Mozambique.

New tourism developments in the PNQ will only be permitted on sites specified by the PNQ Administration. These sites will be announced by the PNQ Administration, and selection of investors will be through a competitive bidding process.

Tourism developments must be planned and operated so that they are compatible with the PNQ's goals for tourism, conservation and community development; and preserve of the sense of remoteness and distinctiveness that are key elements of the PNQ's attractiveness as a tourist destination.

Summary Description of the PNQ

Establishment of the 7,500 km² Parque Nacional das Quirimbas, in Mozambique's northern-most Cabo Delgado Province, close to the border with Tanzania, represents a globally significant conservation achievement. This park hosts an exciting array of wildlife, and helps protect one of the richest areas of coral reef in the world.

The park combines important terrestrial and marine components, protecting a rich array of coastal forests and mangroves, coral reefs and sea grass beds, as well as charismatic species such as marine turtles, whales, dolphins and sharks, plus elephant, leopard, buffalo, lion and African hunting dog. Through the park, sustainable use practices can be introduced into an area where there is heavy and increasing pressure on the natural resource base. The park's 1,500 km² marine component of the park is made up of part of the Quirimbas Archipelago, and includes eleven coral islands lying close offshore, stretching for 100 km along the coast. Over 50 genera of corals have been recorded within the park. The park also includes the St Lazaro Bank – a world-class game-fishing location, 42 nautical miles off the coast, which can be an important component for income generation from responsible nature-based tourism and leisure activities.

The PNQ also protects fish resources, supports local livelihoods and food security, and promotes environmentally sustainable development.

Socio-Economic aspects of the PNQ

The PNQ has a predominantly subsistence economy, containing a large number of young people with limited education or transferable skills, a high rate of illiteracy and little exposure to tourism. The implications of this for tourism and community development are that considerable amounts of training and support will be needed to build the capacity of the local population to participate in tourism, and particularly, the high-value tourism that is envisaged in the PNQ Management Plan. This applies both to direct employment in tourism, and to local production of goods and services for tourism, for example of some food supplies, furniture, or handicrafts.

An estimated 100,000 people live within the boundaries of the PNQ: more information on the socio-economic situation of people living within the park is provided in the PDT (Volume 1) and in the District Profiles for the six Districts that are covered fully or in part by the PNQ.

PNQ Aims and Administration

The PNQ has very clear aims in developing sustainable tourism within the park:

- **Develop tourism sustainably** so that it makes net contributions to conservation and the economic and social development of local communities.
- **Regulate and manage** tourism to maximise yield, ensure sustainability and maintain the balance between tourism, conservation and community development objectives.
- **Build effective partnerships** between the PNQ's communities and tourism enterprises based on the strengths of each of these stakeholders.
- **Promote high visitor satisfaction** with tourism experiences in the PNQ, and the safety of tourists.
- Maintain and enhance the PNQ's and the Quirimbas' reputation as one of the **world's leading exclusive and pristine destinations**.

The park is managed by the PNQ Administration, which is overseen by the National Directorate for Protected Areas in the Republic of Mozambique's Ministry of Tourism. The Comité de Desenvolvimento do Parque Nacional das Quirimbas (COMDEQ) maintains an on-going dialogue with the private tourism sector that operates in the PNQ, the communities of the PNQ, and the PNQ Administration, on key aspects of tourism in the PNQ. The PNQ Administration coordinates its management of the PNQ with other relevant bodies including MITUR, DNAC, MICOA and Provincial and District Authorities.

Existing and Planned tourism in the PNQ

Currently, the PNQ receives around 3,000 tourists each year, and it is estimated that their average stay in the park is 3.36 days. The annual occupancy level of existing tourism accommodation within the PNQ is relatively low, although there is variation between individual accommodation enterprises. The immediate priority for the PNQ is for an increase in occupancy of all tourist beds in the park to at least 40%. New developments in the PNQ will not be permitted until the average occupancy of all available tourist accommodation within the park has grown at 1.4% per year for at least three consecutive years and exceeds 40%. At that stage, the PNQ may decide to invite proposals and tenders for new tourism development on one or more specified sites within the park. The PNQ will decide for which, if any, sites proposals and tenders may be invited, based on the factors and phased development strategy set out in the PDT.

As at December 2008, the following tourism accommodation was fully available for tourists visiting the PNQ:

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| • Guludo Beach Lodge (24 beds) | • Mareja (4 beds) |
| • Ibo Island Lodge (18 beds) | • Matemo Island Resort (48 beds) |
| • Cinco Portas (10 beds) | • Quilalea Luxury Private Island (18 beds) |
| • Miti Mwire (6 beds) | • Londo Lodge (Buffer zone) (opened mid-2006) (12 beds) |
| • Ibo Island homestays (part of PNQ's community-based tourism programme) and low-end accommodation (3 families providing homestays) | • Pangane (Buffer zone) (up to 16 beds) |
| | • Taratibu (6 beds). |

No information is available on the origin of tourists visiting the PNQ. Data on the origin of tourists visiting Cabo Delgado in 2006 was as follows¹:

<u>Origin of tourists</u>	<u>Number of tourists</u>
Mozambique	17,709
Foreign	10,855
• South Africa	6,700
• Continental Europe	1,700
• Zimbabwe	700
• Others	1,755
Total number of tourists in 2006	28,564

¹ Source: Província de Cabo Delgado Direcção Provincial do Turismo, 2006

For Mozambique overall, MITUR estimates that in 2006 there were 606,000² international visitor arrivals to the country. Most of these visitors came from South Africa (67%), while Portugal, the next largest international source market contributed just 7.5%. International visitors came primarily on business (54%)³ or to visit friends and relatives (VFR); only 28%³ came as leisure visitors – well below the African average. Most leisure visitors are on a southern Africa trip, as opposed to visiting Mozambique as a single destination. Southern Mozambique is the major beneficiary of this inbound tourism.

Access to and within the PNQ

Access both to and within PNQ is a major consideration in terms of time and cost for both visitors and the transport of goods, materials and produce.

Pemba is the main jumping-off point for tourism into the PNQ, and is reached by air from Maputo (c. 1.5 hours), Johannesburg (c. 2.5 hours) and Dar-Es-Salaam (c. 1.5 hours). It is also possible to drive from Maputo on reasonable roads: this journey takes 1.5 – 2 days.

Access to sites within the PNQ is available by road, air and boat.

From Pemba, the PNQ is accessible by a good tarmac road to Nanduli on the southern border of the Park. This road continues northwards to Macomia and the Tanzanian border. The other branch of this road turns westwards to Montepuez. Apart from these roads, most roads within the Park are sand tracks, ranging from reasonable to impassable in the rainy season.

Most visitors to the islands, including Ibo Island, travel by private plane from Pemba. Landing strips are available on Ibo, Matemo, and Quirimba. Quilalea is reached by helicopter. Flights from Pemba to the islands take between 20 – 30 minutes.

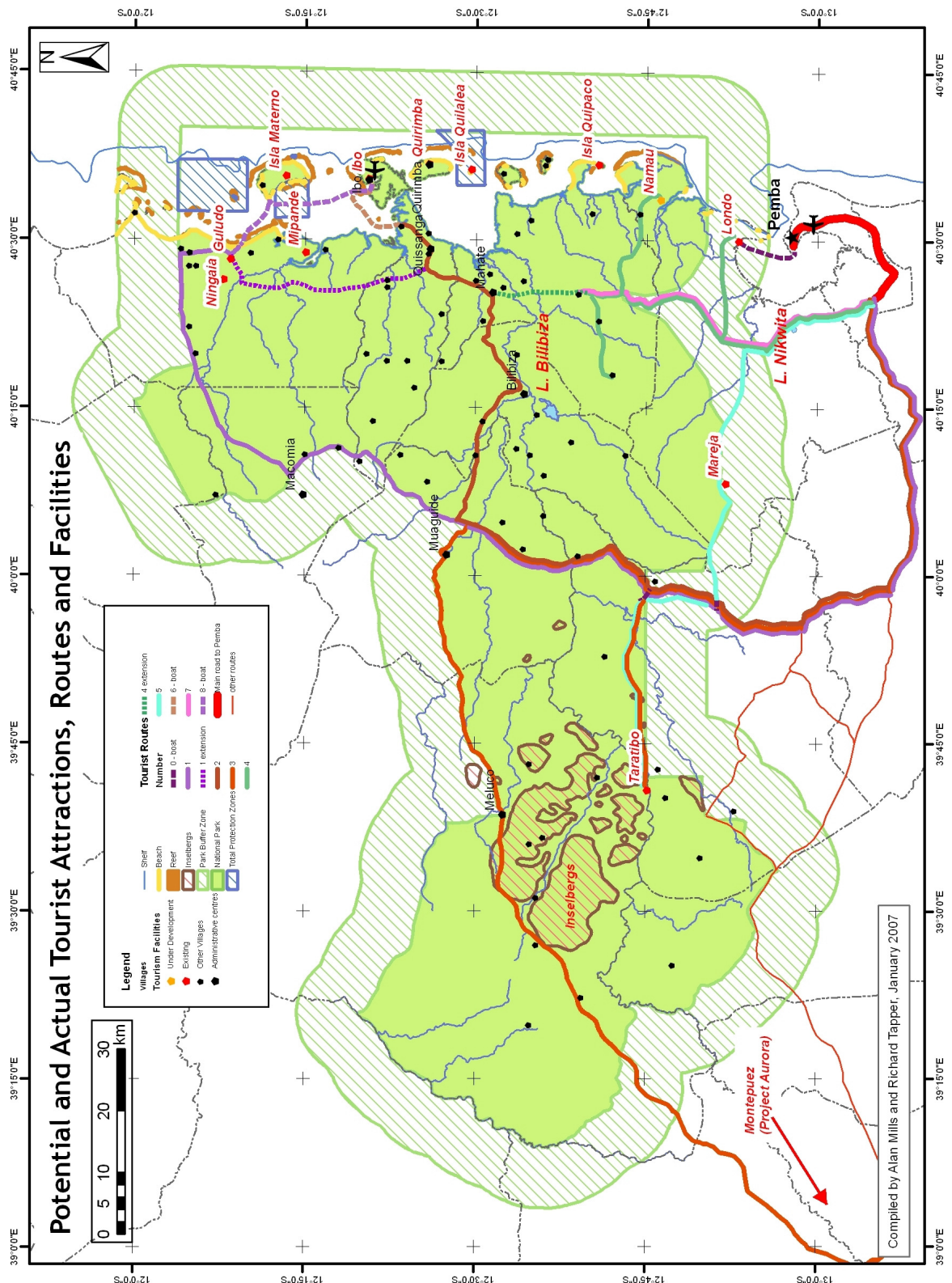
Private boats are also used to reach the islands, depending on weather. Unscheduled and rudimentary dhow services operate from Tandanhague to the islands, but there are no bookable tourism ferry services to the islands. Tandanhague is 4-6 hours' drive from Pemba. Guludo and Pangane on the north of the park can be reached by road in about 4 hours, and Meluco in the west can be reached in about 3 hours.

The main tourism access routes in the PNQ are shown in Map 1.

² MITUR (2007) "Tourism Indicators"

³ FIAS (2005) The Tourism Sector in Mozambique – A Value Chain Analysis, Africa Private Sector Development

Map 1: Tourist attractions, routes and facilities in the PNQ, 2007



Sustainable Development of Tourism in the PNQ

The future for tourism in the PNQ lies in **developing tourism sustainably in the park so that it contributes to conservation and the economic and social development of local communities.** The key target is to focus on increasing **yield per visitor** (e.g. spend achieved per visitors, how much of this spend is retained within the local economy, length of stay, seasonal spread, etc.) rather than numbers of tourists in the PNQ. This measure of success is central in the approach set out in the Cabo Delgado Integrated Tourism Development Plan, and is perhaps even more important for the PNQ. Increasing numbers of tourists without increasing yield puts pressure on local infrastructure and resources for little net gain economically from tourism, while increasing yield per tourist provides significant net gains locally that properly handled and regulated can stimulate local economic development.

The means to achieving sustainable development of tourism in the park and growth in yield per visitor, are as follows:

1. Attracting the right kind of high-spend, low-impact visitor
2. Attracting suitable investors and developing appropriate tourism products and services that are in keeping with PNQ's "sense of place"
3. Training and developing local people to provide required service standards
4. Empowering local people through continuous skills development
5. Ensuring that local communities are the primary beneficiaries from tourism in their areas
6. Regulating and managing tourism development to maintain the appropriate balance between these factors, and between tourism and conservation objectives.

The PNQ's main focus is on developing, managing and monitoring a sustainable park infrastructure, with appropriately appealing tourism products and international safety standards.

Mozambique, and PNQ in particular, offer what a growing number of relatively affluent international travellers want: **a "new", remote, unspoilt eco-tourism destination that offers a remarkable variety of experiences.** **The park's image is critical: the overall aspiration for tourism in the PNQ is to maintain an image of exclusivity – an aspirational destination for the African connoisseur.**

The Government of Mozambique has identified tourism as an important sector to promote in the country, and has adopted the Strategic Plan for the Development of Tourism in Mozambique (2004 – 2013). The strategic plan particularly encourages high-value, low volume forms of tourism, and identifies Cabo Delgado and the other provinces of northern Mozambique as areas to be developed as exclusive destinations and marketed to affluent segments of the international travel market based on the region's historic, cultural and natural heritage⁴.

It is essential to avoid overexpansion of tourism capacity. Experience elsewhere shows that both over-capacity and over-development can create downward pressure on value and upward pressures on tourist numbers, with the result that tourism shifts towards lower value and higher volumes. This in turn can lead to destinations and communities suffering from associated environmental and social problems.

Development of tourism in the PNQ and its buffer zone must also match the needs and aspirations of such visitors, focusing on small, distinctive lodges with high standards of service, architecture based on local styles and materials, offering a range of activities run at high professional standards, and with separation from other types of tourism in order to maintain the image of being in a special place.

PNQ's brand marketing must convey a sense that this is a special part of Africa that is relatively unspoilt and wishes to remain so.

⁴ National Tourism Policy and Implementation Strategy of April 2003; Plano Económico e Social para 2006 operacionaliza o Programa Quinquenal do Governo 2005-2009

Key touristic features of the PNQ

The PNQ exhibits diverse and high quality touristic features:

Islands	the islands of the Quirimbas archipelago are the PNQ's best-known and most visited tourism asset.
Beaches	the Park has excellent beaches that surround its islands, and on the mainland where there are two large continuous beaches in the north and several small beaches in the southern section.
Coral reefs	fringing reefs are present on the seaward side of the islands, mainland promontories and parts of the coast. As well as providing excellent current and potential sites for scuba diving, the fringing reefs also provide some storm protection for the islands and mainland.
Coastal shelf edge ("Drop-off zone")	the transition from shallow to deep water takes place close to the islands and shore in much of the maritime area of the Park. The fringing reefs around the islands are located in the shallower water near the edge of the coastal shelf, and such sites provide excellent opportunities for more experienced scuba divers to visit rich deeper water habitats on the seaward side of fringing reefs and on the underwater cliffs of the drop-off.
Patch reefs	patch reefs are extensively scattered in more sheltered and shallower water around the islands and off the mainland beaches: many are easily accessible for snorkelling and scuba diving.
Fish sanctuaries	the Park has established several fish sanctuaries which are designated as total protection zones within the Park's Management Plan, where fishing is prohibited. Fish populations and associated reef habitat are of excellent quality in these sanctuaries, where divers and snorkellers can view larger specimens of fish and a greater diversity of sealife. These improvements in fish populations and reef habitats occur quite rapidly (over a period of 6 to 18 months) following prohibition of fishing and establishment of fish sanctuaries: as well as creating important dive and snorkelling sites, sanctuaries also help to improve general fish populations and to increase catches in areas where fishing is permitted adjacent to sanctuaries.
Viewpoints for scenery and wildlife	much of the terrestrial part of the Park has undulating topography. There are several excellent viewpoints for wildlife watching (for example, at Ningaia, and near Taratibu), and scenic viewpoints (eg. looking east from the edge of the eastern boundary of the Park along the road between Muaguide and Macomia).
Bird watching	the Park is situated geographically at the overlap of two of the major African bird regions overlap. Consequently it has a mix of species that are not normally seen together, making the area a destination of high potential for development of bird watching.
Permanent water bodies	Lake Bilibiza is a permanent water body, and provides potential opportunities for both for wildlife viewing at year-round watering holes, and for a limited amount of canoeing.
Inselbergs	spectacular inselbergs are present in the western part of the Park, and coincide with areas of biological importance for their high levels of endemic species. In Meluco, there are two extensive areas of inselbergs, divided by the River Aquite; a further group of inselbergs is located in Ancuabe. As well as their scenic interest, the inselbergs offer potential opportunities for trekking, rock climbing and mountain biking, and at appropriate sites, for development of wildlife viewpoints.
Sites of historic and cultural interest	as well as Ibo Island, where restoration of the old town has begun to protect its historic sites and architecture with a mix of African, Arab, Chinese and Portuguese influences, the Park also includes other sites with buildings of interest, including colonial or pre-colonial ruins on Quirimba, Quisiwe and Matemo islands, and traditional burial grounds in Ancuabe district. Archaeological investigations are in progress or planned on Ibo, Matemo and Quisiwe Islands.

Existing and Potential tourism activities in the PNQ

A range of activities in the PNQ are accessible and could be offered from existing and potential sites of tourism accommodation. These include:

- Bird watching
- Boat trips
- Bush experience / Bush walking
- Canoeing
- Climbing / scrambling
- Dhow excursions
- Heritage tours on Ibo
- Historical visits
- Leisure fishing
- Mangrove visits
- Mountain biking
- Scuba diving
- Snorkelling
- Sport fishing
- Traditional dance
- Turtle watching
- Village tours
- Whale watching
- Wildlife watching
- Wind-assisted sports (sailing, kite surfing, windsurfing)

However, despite the wide range of possible activities, most are not well-developed at the present time, and/or are not easily accessible to most tourists in the area. Some of these activities would require significant investment to be developed into key features of the tourism offer available in the PNQ.

Experience elsewhere shows that what works best is for existing tourism operations to identify and establish activities for their guests, where possible and appropriate involving the local community and training a local community member to become an interface in order to conduct these activities.

Market considerations for tourism in the PNQ

Cabo Delgado and PNQ jointly face the challenges of limited accessibility and high costs; the comparative cost of travel to and in Cabo Delgado – and therefore PNQ – will, for the foreseeable future, remain relatively high in comparison to other tourism destination in Southern and Eastern Africa.

The comparative advantage of Cabo Delgado and the PNQ is their combination of undiscovered, untamed, pristine Indian Ocean coastline and islands, spectacular corals and marine life and unique and non-commercialised cultural heritage.

A sense of remoteness and distinctiveness is a key element in the attraction of the Quirimbas Archipelago, and contributes to making it an exclusive and sought after tourist destination: its competitive edge is further enhanced by its current novelty value as a destination. However, there is a risk that this could fade over time as more people visit PNQ. This indicates the need to preserve PNQ's exclusiveness through sensitive quality development and pricing, which will help ensure that tourism in PNQ develops sustainably.

The evidence of market and tourism trends point to the following features for tourism in the PNQ⁵:

- The PNQ's islands will remain a popular destination, and relatively strong market demand means that tourism is likely to expand at these sites, initially through increases in occupancy rates, and in the mid-term by addition of extra bed capacity.
- Beaches and the coastal strip of the PNQ's continental territory are also likely to experience relatively strong market demand, and may develop in similar ways to tourism on islands in the PNQ.
- Ibo Island also provides an important historic and cultural attraction, along with the potential to develop as a 'tourism hub' within the PNQ catering for mid-range as well as high-end tourism, providing a base for a range of short excursions and activities.
- Island and coastal tourism is likely to make up around 90 percent of all tourism in the PNQ in the foreseeable future. It is important to consolidate existing tourism in these parts of the PNQ and as a priority, to expand the range and quantity of activities and excursions available to tourists.
- Tourism in the PNQ's inland areas is in its infancy.

⁵ This PDT was prepared before the global economic crisis that began at the end of 2008. The resulting economic situation is likely to significantly constrain growth of tourism in the PNQ until global economic conditions improve.

- There is scope to introduce some mid-range tourism accommodation and offers (with an average daily spend of USD 80-100 per person per a day) in the PNQ.
- Although low at present, tourism demand from more affluent Mozambicans is likely to increase over time, particularly for leisure tourism in coastal areas and islands, and to Ibo for its cultural heritage.
- Marketing tourism in the PNQ as the beach element of “Bush & Beach” regional packages has considerable potential, and would help to market tourism in the PNQ to tourists who are attracted to safari experiences in popular parks elsewhere in the region (eg. Kruger National Park in South Africa; Luangwa National Park in Zambia).
- Tourism growth in the PNQ is likely to progress gradually, rather than dramatically, in view of the relatively limited size of niche markets that would both be interested in, and able to afford, a trip to PNQ. Although a short-term growth spurt might be expected as Mozambique becomes more widely known as a “new “ destination. However growth is likely to settle into a steadier pattern after a few years⁵.

Key Market Segments and “Niche Appeal” of PNQ

Marketing assessment indicates that PNQ appeals particularly to three travel segments: Luxury Experiential Travellers, Active Explorers, and “Mono-passionate” or Special Interest Travellers.

The demographic profiles of these segments, values that tourists in these segments apply when making their travel decisions, and their approach to life, are as follows⁶:

- **Luxury Experiential Travellers:** This experienced group is well-travelled and is in search of new exotic destinations offering authentic nature and culture experiences. They are relatively affluent and, while they seek authentic nature and culture, they prefer doing so in luxury and comfort. Experiences such as Quilalea Luxury Private Island and Ibo Island Lodge, coupled with the intriguing cultural heritage of Ibo and luxury safari breaks in Tanzania or Zambia, will appeal to them. They are likely to be “empty-nesters”⁷ and retired people (50+), who have previously visited other African countries, and have developed an interest in, and love for, Africa.
- **Active Explorers:** This younger travel group, predominantly aged between 30 and 50, is a growing market segment that is constantly in search of new natural and cultural environments to discover. They prefer active and interactive cultural and natural encounters and are prepared to trade off luxury in favour of exceptional adventures and discovering new travel destinations. Experiences such as Ibo’s cultural heritage, interaction with local people, and the opportunity to participate in adventure sports and activities, such as diving, fishing, sailing and hiking, will appeal to them. They are adventurous-minded and likely to be successful professionals, self-employed, business people and senior public servants, living and working mostly in metropolitan areas, who are well-travelled and have previously visited at least one African country: people whose choice of holiday destination says something about their independence of spirit and determination not to follow the herd.
- **“Mono-passionate” or Special Interest Travellers,** whose trip is driven primarily by the desire to undertake one activity that PNQ is particularly well-placed to satisfy (e.g. birders, divers, sport fishers, scientific researchers). The profile of these people is similar to the “active explorers”, although with a slightly wider age profile, with birders in particular likely to stray into the 50+ age group.

Within these segments, the PNQ’s touristic features have particular appeal to the following **key niches**: divers, birders, deep-sea fishers, eco-tourists, adventurous Africa-philos, luxury beach resort seekers, and a bush-beach combination with South Africa (e.g. Kruger/PNQ), Tanzania (e.g. Selous/PNQ), or Zambia (eg. Luangwa/PNQ).

Environmental and social sustainability are also important factors that influence and motivate individual tourists in these niche markets, and which affect their choices of tourism destinations.

The tourists in these niche segments are generally the more affluent tourists, and include a far higher proportion of people who have received tertiary education.

It is important to understand that the profile of **South African visitors** to PNQ is likely to be different from the profile of South Africans visiting southern Mozambique. This is because the proximity of southern Mozambique to South Africa, and to Johannesburg in particular, attracts a lower-spending, self-drive, family beach holiday market, whereas the distance from South Africa and cost of flights to PNQ inhibits PNQ’s appeal to this market.

⁶ Defined by Preliminary Integrated Tourism Development Plan for Cabo Delgado: 2007-2013, and refined further here

⁷ “Empty nesters” are parents whose children have grown up and left home

Environmental considerations for tourism in the PNQ

Tourism inevitably brings environmental impacts, but these can be minimised through sound planning and management from the earliest stages of tourism development. The main problems are frequently associated with waste management (including littering), fuel spills, and high levels of water demand linked to tourism, with environmental disturbance and erosion particularly during construction work, and with inappropriate siting and design of tourism facilities.

As tourism grows, increasing water demand may place serious pressure on groundwater resources, and groundwater extraction for tourism may affect the levels of water available to local communities. In coastal regions and on islands, water supplies can be obtained from desalination, although this is an energy-intensive process. In all areas water harvesting can also be used to seek to reduce extraction of groundwater resources for tourism.

In relation to coral reefs, the main threats from tourism are linked to coastal development of tourism facilities, local overexploitation of fish populations to supply the tourism sector, the impact of pollution and soil erosion from inland tourism sites (as this ends up in the marine environment), and marine pollution from tourism facilities (including from waste and effluent disposal, and from fuel and oil spills)⁸.

The PNQ is fortunate that these and other potential adverse impacts from tourism do not appear to have reached a serious level at present. The PNQ will therefore regulate tourism and manage site use carefully in both terrestrial and marine areas of all types. The guidelines for tourism development and operations in the PNQ include measures to help prevent future environmental problems. Key elements of these guidelines are:

- Every tourism operation must have a comprehensive environmental management plan and systems in place, comply with relevant legislation and implement measures to avoid and mitigate adverse environmental impacts. Tourism facilities must be designed to be as environmentally friendly as possible. The environmental management plan must include plans for waste management, water management, and energy management to minimise waste production and use of water and energy.
- A hydrological survey is a required part of environmental assessments prepared by tourism investors as part of the Environmental Licence process.
- Every tourism operation must be aware of the possible risks of uncontrolled fires and have a fire control methodology in place.
- When procuring local supplies, especially fish and seafood, and timber, tourism operators must ensure that these supplies have been legally and sustainably harvested.

The PNQ Management Plan permits communities to harvest materials from defined community development areas for sale to tourist concessionaires, with the aim of contributing to creation of jobs within the PNQ. Mangrove wood may not be used by tourism investors, but only by the local population for their own use in for example boat building. Its sale is prohibited. Charcoal production is also prohibited in the PNQ.

⁸ World Resources Institute, International Center for Living Aquatic Resources Management, World Conservation Monitoring Centre, United Nations Environment Programme (1998) Reefs at Risk: A Map - Based Indicator of Threats to the World's Coral Reefs, authors: Dirk Bryant, Lauretta Burke, John McManus and Mark Spalding, published by World Resources Institute, Washington DC, USA

PNQ's Phased Tourism Development Strategy

Tourism development in the PNQ is planned and managed in a manner that reflects likely demand growth and takes accessibility factors into account within a sustainable framework. Demand for tourism in the PNQ and its buffer zone is likely to progress gradually, rather than dramatically, building on existing developments and accommodation. The supply of bed capacity in the PNQ and its buffer zone will be regulated by the PNQ Administration in conjunction with relevant public authorities. In particular, care will be taken to prevent development of excessive bed capacity in relation to demand, since this would risk undermining – economically and from a market perspective – successful tourism in this area in the mid- to long-term.

Priorities for tourism development in the PNQ are to:

- Consolidate tourism on the **islands and coastal areas** by encouraging improvement and expansion of the range of **activities** offered (especially community-based activities and/or those employing local people), including those suitable for day excursions from existing accommodation.
- Enhance and/or develop **natural and historic sites** and site management for day excursions in the coastal area and the islands.
- Develop small, **intimate lodges and quality tented camps** in the interior.
- Develop access to natural sites in the interior through **activity programmes** (e.g. hiking, trekking).

Overall, the PNQ Administration will keep tourism density at a correct and low level, and avoid allowing development of overcapacity in tourist beds, as part of implementation of the overall strategic approach that targets key market segments by maintaining the PNQ's image as 'a special part of Africa'.

The priority is to increase occupancy levels for existing tourist bed spaces and so to increase income based on the existing tourism provision. To ensure viability of tourism for the mid- to long-term in the PNQ, it is vital that bed capacity is regulated to keep within demand for accommodation from tourists.

New developments will only be permitted if:

- the occupancy of all existing beds in the PNQ and its buffer zone:
 - i) exceeds an average annual occupancy of 40 percent, and
 - ii) the increase in average annual occupancy over the past three years exceeds 1.4% per year;
- the number of beds added is warranted by the increase in number of visitors in the PNQ and its buffer zone;
- an overall balance is maintained within the phased tourism development strategy between different types of tourism accommodation; between tourism on islands and the coast and tourism in inland areas; and between tourism accommodation and availability of tourism activities, attractions and excursions.

To implement the phased tourism development strategy, concessions will only be allocated for the sites identified in this PDT. Table 1 lists these sites, along with the maximum number of tourist beds and the type of tourism that would be permitted at each of them.

The PNQ Tourism Development Plan sets out 4 development phases:

<u>Phase</u>	<u>Activity</u>
Phase 1a	<ul style="list-style-type: none">• Consolidation and improvements to existing accommodation and tourism projects• Small scale community tourism development• Develop excursions and activities, particularly water-based activities, wildlife viewing, hiking and birdwatching
Phase 1b	<ul style="list-style-type: none">• Upgrade and expand of basic and mid-range accommodation in Block A, buffer zone and islands
Phase 2	<ul style="list-style-type: none">• Upgrade and expand homestay and mid-range accommodation on Ibo Island• Develop accommodation in Block C at Mipande / Quisiwe Island
Phase 3	<ul style="list-style-type: none">• Develop new upmarket lodge accommodation in Block A (Naia area to NW of Meluco-Ravia road) and Block B (Bilibiza area)• Develop Mogundula Island (buffer zone)• Expand and upgrade Pangane accommodation (buffer zone)
Phase 4	<ul style="list-style-type: none">• Further development of new upmarket lodge accommodation in Block A (Area to SE of Meluco-Ravia road) and Block C

The maximum numbers of tourism beds for each tourism concession is set at 24, with the exceptions of Matemo Island Resort and Pangane where up to 48 tourist beds are permitted. For community-based tourism, a maximum of 12 tourist beds per location is set as there is a lower demand for this type of accommodation amongst the PNQ's key market segments, and it is important to avoid development of community-based tourism beds for which there is not sufficient demand.

Table 1: Tourism accommodation concessions – Maximum numbers of tourist beds

Location of accommodation	Maximum number of tourist beds	Type*
Ancuabe sede (small basic hotel by renovating/upgrading existing buildings)	12	CBT
Bilibiza	24	MR
Block A (Area to SE of Meluco-Ravia road)	24	HE
Block A (Naia area to NW of Meluco-Ravia road)	24	HE
Block A (Taratibu)	24	HE/MR
Block B (Bilibiza area)	24	HE
Block C – lodge (site location to be determined)	24	HE
Guludo Beach – new lodge on south part of beach	24	HE
Guludo Beach Lodge	24	HE
Ibo Town (lodges, homestay and mid-range accommodation)	Tourist accommodation developed only through renovation and refurbishment of existing buildings in harmony with existing architecture in accordance with plans and zoning established by MICOA ⁹	HE/MR/LE/CBT
Ibo Island Lodge	30	HE
Ilha Quirimbas (CBT at Casa Massenga)	12	CBT
Ilha Quirimbas (mid-range accommodation alongside agricultural concession)	24	HE/MR
Londo Lodge (buffer zone)	24	HE
Mareja Bush Lodge	24	HE/MR
Matemo (CBT at Muanacombo)	12	CBT
Matemo Island Resort	48	HE
Meluco sede (homestay and basic pensão accommodation)	12	CBT
Mipande / Block C	24	HE
Mogundula Island (buffer zone)	24	HE
Namau	12	CBT
Pangane mid-range and basic accommodation (buffer zone)	48	MR/LE
Quilalea Island	24	HE
Quipaco Island	12	HE
Quisiwe Island	24 ¹⁰	HE
Quissanga sede (small basic hotel by renovating/upgrading existing buildings)	12	CBT
Sito	24	MR
Tandanhague	6	CBT
Taratibu (Block A)	See Block A (Taratibu)	
Abbreviations: HE – High-end accommodation; MR – Mid-range accommodation; LE – Low-end / basic accommodation; CBT – Community-based tourism		

Ibo Island

Tourism accommodation on Ibo Island will be developed through rehabilitation of the houses and ruins that already exist in Ibo Town. No new constructions for tourism purposes will be authorized on Ibo Island, and no tourism development will be permitted outside of Ibo Town. No specific limit on numbers of tourist beds in Ibo Town is currently set, but tourist accommodation may only be developed through renovation and refurbishment of existing buildings in harmony with existing architecture in accordance with plans and zoning established by MICOA¹¹, and within the capacity of the available

⁹ MICOA (2008) “A Proposta Preliminar do Plano de Urbanização da Vila do Ibo”. MICOA planning document for Ibo; reports of USAID and other projects on restoration of Ibo

¹⁰ An investor applied for permission to construct 48 beds on Quisiwe Island, but as at December 2008 there was no progress by the investor on this investment, and no construction work had been undertaken

¹¹ MICOA (2008) “A Proposta Preliminar do Plano de Urbanização da Vila do Ibo”. MICOA planning document for Ibo; reports of USAID and other projects on restoration of Ibo

infrastructure, particularly for water supply, sewage and waste disposal. The same licensing procedures apply in Ibo as for the rest of the PNQ, and the PNQ Administration will carefully consider evidence of the level of tourism in reaching any decisions to permit or refuse permission for development of additional tourist beds. As in the rest of the PNQ, the PNQ Administration will keep tourism density at a correct and low level, and avoid allowing development of overcapacity in tourist beds, as part of implementation of the overall strategic approach that targets key market segments by maintaining the PNQ's image as 'a special part of Africa'. The PNQ Administration will monitor tourism development in Ibo Town, and may set a maximum for the number of tourist beds that will be permitted on Ibo.

Mefundvo Island

No tourism development will be permitted on Mefundvo Island, in order to conserve the only remaining large island within the PNQ which is free of tourism development.

Inland areas of the PNQ

Three blocks in the inland areas of the PNQ have been identified where the human population density is very low. The approximate boundaries of these blocks (Block A, Block B, and Block C) are indicated on Map 2. The phased tourism development strategy includes potential development of tourism at various sites within these Blocks:

- Block A:** Development of 'bush experience' at Taratibu in the mid-term, and at two sites in the area of the Meluco inselbergs in the longer-term ('bush experience' is a mix of hiking and adventure-type activities in a bush environment with less emphasis on wildlife viewing reflecting the relatively poor viewing conditions in the dominant Miombo forest habitat).
- Block B:** Development of wildlife viewpoints and suitable accommodation in the vicinity of Bilibiza Lake and Namacula in the mid-term.
- Block C:** Development of wildlife viewpoints and birdwatching with a tourism lodge planned at Mipande on the edge of the block, and a further future lodge development.

Types of accommodation development in the phased development strategy

The phased tourism development strategy covers all types of accommodation including high-end, mid-range and low-end accommodation, investor-based and community-based provision, and provision for domestic tourism.

High-end accommodation

High-end accommodation is a vital part of this market focus, and is already available within the PNQ, and the PDT anticipates further development of high-end accommodation provision in the PNQ and its buffer zone. It should also be noted that due to the high travel costs of visiting the PNQ, most visitors will be looking for high-quality accommodation experiences that to them will justify their travel costs. High-end accommodation, and high-quality tourism experiences and activities are a major market focus for the PNQ.

Mid-range and low-end accommodation

Mid-range and low-end accommodation is already available within the PNQ on Ibo Island, at Pangane and in Meluco, Mareja and Taratibu. Expansion of this provision is anticipated at Namau, on Ibo and at Pangane where investors have already submitted proposals for this to the PNQ. Quirimba Island is also a possible site for mid-range accommodation. Community-based provision is planned on Matemo at Muanacombo.

Mid-range accommodation should not dominate within the PNQ.

The PNQ will ensure that the coastal area is kept predominantly exclusive, and maintain sufficient separation between mid-range sites and exclusive sites so as to maintain the premium value and attractiveness of these sites to high-end tourists, and the overall image of the PNQ as 'a special place in Africa'.

Domestic travel and tourism

As a National Park, the PNQ is an important part of the natural and cultural heritage of the people of Mozambique, and should therefore be accessible to national travellers. The phased tourism development strategy includes development of accommodation provision that would be accessible to Mozambican tourists, including on Ibo, at Pangane, Meluco, and Quissanga and in Ancuabe, as well as community-based projects on Matemo and Quirimbas, and at Namau.

Holiday homes and private homes rented for tourism

Development of holiday homes and private rented accommodation for tourism is not permitted in the PNQ and its buffer zone. The PNQ Administration will not support issuances of Special Licences for tourism use to holiday homes and private homes, and will review the validity of licences of existing homes that have been developed in the PNQ and its buffer zone, and take enforcement action where uses are not in compliance with licences and Mozambican legislation.

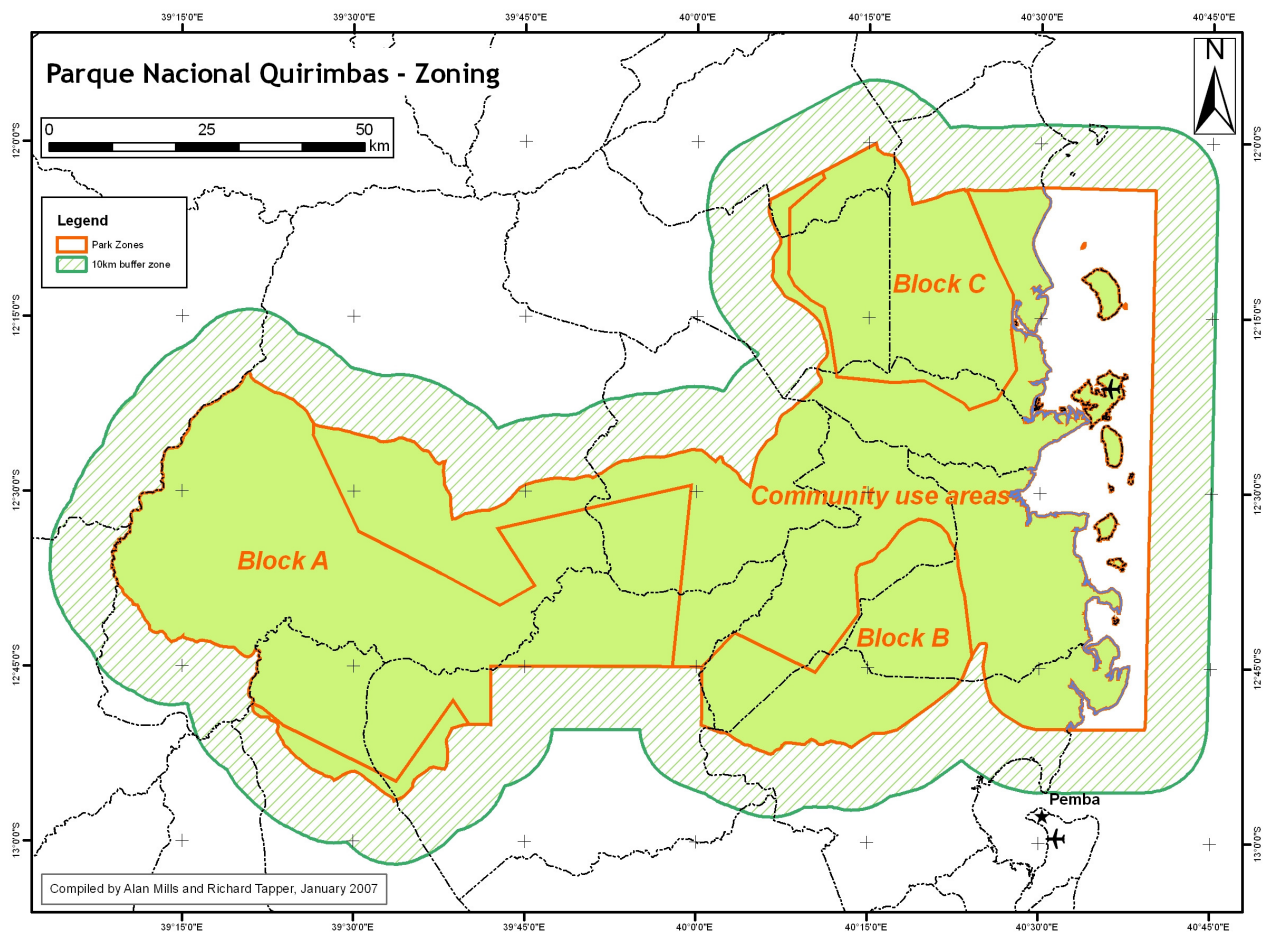
Community-based tourism

The phased tourism development strategy includes accommodation developments as part of the PNQ's community-based tourism programme at Ibo, Namau, Mahate (planned), Meluco and Matemo (planned), and a community-based attraction at Ningaia.

Campsites

No dedicated tourism campsites are included in the phased tourism development strategy: the market demand for tourist campsites is extremely limited and such campsites are not economically viable within the park at the present time. However camping pitches may be permitted alongside accommodation at suitable sites (eg. at Taratibu, or around community-based tourism sites at Namau), where this does not conflict with the main tourism focus of the accommodation.

Map 2: Blocks A, B and C (Map provided by the PNQ Administration)



PNQ Regulations

The PNQ's Regulations and guidelines for tourism are designed to ensure that tourism is developed and managed sustainably in PNQ. They are also intended to benefit tourism companies that operate in the PNQ, by establishing clear minimum standards for tourism development, operations and activities, and in so doing help to promote and maintain the high quality of tourism within the PNQ.

Implementation of the guidelines will be monitored by the PNQ, and other relevant bodies including MICOA, Fisheries, Floresta e Fauna Bravia, DNAC and District Authorities, and their effectiveness at preventing adverse effects will be reviewed at regular intervals.

Within the context of the PNQ's Management Plans, these regulations and guidelines have vital roles in:

- Ensuring the quality of tourism in the PNQ
- Ensuring the safety of tourists
- Promoting high visitor satisfaction with tourism experiences in the PNQ
- Maintaining the PNQ's and the Quirimbas' reputation as one of the world's leading exclusive destinations
- Contributing to establishment of a "brand image" for the PNQ as a leading sustainable tourism destination

The PNQ regulations cover both construction and operating phases:

Tourism development and operations

1. Planning and design of tourism facilities
2. Energy use and conservation
3. Water conservation
4. Waste management
5. Pollution prevention
6. Drainage
7. Building materials
8. Transport and access roads
9. Air transport
10. Management of construction
11. Local economic linkages
12. Working conditions and staff training
13. Community interactions
14. Consumer education

Tourism activities

1. Training, staff competence and qualifications
 2. Maintenance
 3. Management of activities
 4. Waste management (including solid wastes, sewage, and oil)
 5. Consumer education (including instruction and briefings)
 6. Guiding and interpretation
 7. Site selection and utilization (including site protection and allowance of sufficient recovery periods)
 8. Operational safety and emergency procedures and equipment (including first aid)
 9. Conservation (including support for conservation activities and marine protected areas)
 10. Community interactions (including respect for local culture, communities and sites of religious or cultural significance)
- Additional guidance for specific marine and terrestrial recreation activities

Interested investors should consult the "Tourism Development Plan for the Parque Nacional das Quirimbas, Volume 2: Guidelines for tourism in the PNQ" for comprehensive and detailed information on the PNQ regulations that apply to tourism investment in the park.

Key elements of the regulations and guidelines are that tourism developments must comply with Mozambique's laws including the Land Law of 1997, and should be planned and implemented to avoid and minimise damage to the PNQ's biodiversity and natural resources, minimise use of energy and water, minimise generation of wastes, and prevent pollution.

All building materials used must be compatible with the local environment, and obtained from sustainable sources. Solid wastes must be sorted by type of material (eg. paper, plastic, glass, metal) and recycled where possible, or if not, disposed of in an environmentally sound manner at sites located outside of the PNQ.

Limited water resources are available in the PNQ and these must meet the needs of the Park's resident population along with the tourism sector. Infrastructure for sanitation and management of liquid and solid wastes does not exist within the PNQ, and in the coastal areas, soils and groundwater (which is very near the surface in much of the area) could easily be contaminated by effluents from improper disposal of sewage and wastes.

Specific regulations include: Prohibition of mangrove cutting and of extraction of non-living resources (including coral mining, stone and sand collection from intertidal and subtidal areas);

- Prohibition of dumping into marine waters of solid waste, litter, untreated wastewater, sewage or chemically polluted water or liquid;
- Prohibition of artificial drainage of any land area.
- Prohibition of artificial drainage of any land area.

Community relations

Good investor-community relations are of utmost importance and are essential for the long-term success of tourism developments in the PNQ. Investors must establish good relations with communities affected by tourism operations and development, based on mutual respect and communication.

It is important for all parties to ensure that communities are not prevented from having access to resources and land areas over which they have rights, so that local people – particularly those who are not employed by tourism enterprises – do not become marginalized by tourism developments. This includes ensuring that communities have access to all beaches: under Mozambican law, beaches may not be privately owned or used, and communities often regard beaches as important areas for local livelihoods.

Mozambique's legislation on the rights of the communities makes it clear that communities have priority in access to and use of the country's land and resources, and that any land use by investors will only be permitted if prior approval is given by communities.

From the earliest stages of planning any tourism development, the possibilities for involving local communities directly and indirectly in tourism-linked economic activities, and the training and support necessary for them to be able to do this effectively, must be considered by investors.

Community co-ownership of tourism

The concession arrangements for new tourism development in the PNQ will be based on a community co-ownership model. The basic concept of co-ownership is that communities lease land and assets over which they have rights, to professional operators in the private sector who are then responsible for developing, running and managing a tourism operation for a set period of time. After this, the community may choose to continue with the arrangement, or seek a different operator, or decide to manage the tourism operation directly themselves. The contacts between communities and operators will also include provisions for community members to be employed in the tourism operation, and for them to receive appropriate training. Through this, the community can benefit from the professional expertise of operators who are experienced in tourism, and can themselves gain experience in the tourism sector.

Key aspects of the co-ownership model are that:

- Contracts between communities and investors are established on a commercial basis at commercial rates, and the profits that accrue from these contracts are paid into a fund that is managed by the community.
- Statutory entrance and use fees are still levied and remitted to the relevant State authorities.
- Co-ownership does not imply co-management. The involvement of the private sector in developing in tourism around a community brings a realistic market focus to operations.

Tourism development and economic opportunities for communities in the PNQ

Tourism developments in the PNQ must maximise benefits for local communities. Already, employment of staff from local communities plays a large role in the tourism that has been developed within the park, and it is important that this continues in the future. Employment is the most important and tangible benefit local communities can gain from tourism in their areas. Existing tourism accommodation in the PNQ provides employment for some of the people who live in the park. While most senior management staff are brought in from outside the park (including from other parts of Mozambique and from overseas), other staff mainly come from communities within the PNQ. Whenever possible, local community members must be given preference regarding employment.

There is also significant potential to increase indirect benefits from tourism in the PNQ via local purchasing by tourism enterprises, and provision of training and support to enable local production of key goods and services for tourism (eg. vegetable production, handicrafts, furniture, staff uniforms). For example, tourism investors can work with local communities and local organisations to develop and establish such supplies in the quantities and of the right quality that is needed for tourism (eg. setting up community gardens and handicrafts production, provision of training, support for micro-enterprise development and business opportunities for local people and communities). (See Annex 1 for further examples.)

The types of local businesses that can be developed cost-effectively in the PNQ, include:

- Vegetable production
- Fruit production (eg. pineapples)
- Baked food production (breads, cakes, etc.)
- Furniture production
- Handicrafts production.

There are also opportunities for development and promotion of community-based activities/excursions, particularly targeted to customers visiting for island/beach holidays, and to develop 'bush adventure' tourism activities with village elements, in partnership with commercial tourism enterprises. The types of services that communities can develop through these partnerships include:

- Cultural experiences
- Dhow safaris, sunset cruises
- Mangrove trips in dug-out canoes
- Instruction in local fishing methods
- Guiding: village visits, medicinal plants, birding, snorkelling
- Traditional dance
- Traditional face masks (mussiro).

Communities also value the opportunities to provide services for construction and maintenance of tourism lodges and infrastructure, including:

- Labour
- Local building materials, i.e. stone and makuti (woven palm fronds)
- Transport of construction materials, goods, people
- Road maintenance.

Fee structure for tourism in the PNQ

The fee structure for tourism¹² the PNQ comprises:

- Concession fees – paid by investors who have a tourism concession within a National Park, including the PNQ.
- Entrance fees – paid per tourist visit to a National Park.
- Activity fees – paid for particular activities such as scuba diving and snorkelling
- Transport-related fees – including fees for access to National Parks by vehicles and boats of various sizes, and aircraft

Tourism operators are responsible for collecting fees from visitors and remitting them to PNQ.

Communities within the PNQ benefit directly from Park revenues through the “20% mechanism”, whereby 20% of State revenues revert directly to the local population

The legislation under which the PNQ is established permits the PNQ Administration, through COMDEQ, to propose additional fees for tourism within the park.

In order to increase revenue from tourism for local communities, some operators have indicated that they would be willing to add an optional ‘community development levy’ onto guests’ bills as an optional non-compulsory extra. Most operators believe that a vast majority of their guests would not hesitate in paying the extra fee, especially if they were assured of responsible fund management. The funds raised through this would be separate from fees paid to the PNQ and would be spent on community development work in partnership with local communities. It is suggested that 2.5% of the room rate per person per night (with a minimum of USD 5.00 per person per night at 2008 prices) would be a reasonable level at which to set an optional ‘community development levy’, although the actual level would need to be agreed with tourism operators in the PNQ.

Tourism concessions

New tourism concessions in the PNQ will be based on a community co-ownership model, whereby communities lease land and assets over which they have rights to professional tourism operators, who are responsible for running a tourism operation for a fixed period of time. The principle behind this is that tourism operators will bring the necessary commercial expertise to run an efficient operation, from which both they and the community will benefit.

New tourism concessions in the PNQ will generally be offered for periods of no more than 20-30 years in coastal areas and on islands, and 25-35 years in the interior. An open competitive bidding process be used to determine the best offers from investors in terms of compliance with the conditions defined by the PNQ Management Plan and Regulations for tourism development on each specific concession that is offered, provision of benefits for local communities, and the fees proposed by the bidders for use of the concession.

Fees for each tourism concession will be reviewed every 5 – 7 years during the life of the concession, and adjusted to take into account increases in the value of concession sites.

At the end of the concession period, concession-holders may be invited to renew their concessions, subject to PNQ requirements and other regulations in force at the time; or the concessions may be opened up to competitive tender.

¹² Fees are set in accordance with Decree 27/2003 of 17 June 2003.

Procedures for new investment in tourism in the PNQ

Investment in new tourism development in the PNQ will be based on tendering and licensing processes that are designed to ensure that any new investment genuinely benefits local communities, does not damage the environment and enhances the appeal of the park for visitors. Tourism development can only take place in the PNQ on concessions once the required licences have been emitted.

In the tendering process, the PNQ will invite investors selected according to a set of selection criteria to submit proposals and tenders for new tourism development on one or more specified sites within the park. The PNQ will determine the sites for which proposals and tenders will be invited, and the timing of this, based on the factors and phased development strategy set out in the PDT.

An investor that is successful in the tendering process will be required to obtain the various licences that are necessary for businesses to operate legitimately in the park before commencing development and construction activities.

These licences include:

- A Special Licence (required before development can begin)
- An Environmental Licence (required before development can begin)
- A Tourism Licence (required before tourism operations can begin)
- Relevant investment licences / approval from the CPI (Centro de Promoção de Investimentos) - only companies established in accordance with Mozambican legislation, and which are licensed by the Centro de Promoção de Investimentos (CPI) are eligible to apply for Special Licences for tourism in the PNQ.

Investors must also establish a formal, legally-binding Community-Investor Agreements with communities that will be affected by the proposed development, as a pre-condition for any new tourism development in the PNQ; and must comply with strict regulations during both construction and operating phases. These cover environmental, community, and economic issues. They place an onus on the investor to ensure that their development is environmentally and economically sustainable, and that it enhances the livelihoods of communities, improves the appeal of PNQ as a sustainable tourism destination and contributes towards environmental conservation within the park.

In certain cases, Conservation Management Agreements may also be established between investors, local communities and the PNQ.

The national laws of Mozambique apply to all activities undertaken in PNQ at all times. The PNQ regulations supplement, and do not supplant, any Mozambican laws. Investors should satisfy themselves that they have complied with Mozambican law when tendering, planning or operating any tourism concession or activity in PNQ.

Tourism developments must comply with all regulations outlined in the Tourism Development Plan at all times. Tourism operators, and their visitors, are expected to behave responsibly in terms of personal safety, environmental protection and good relations with communities, so that a sustainable long-term future can be ensured for the park and its communities through the development of tourism.

Investor Selection

For the success of tourism in the PNQ, it is of particular importance that tourism development is carried out by investors with the capacity to develop and market tourism effectively within the context of the park and northern Mozambique, and to make maximum use of and generate maximum benefits from the tourism assets of the concession¹³. The characteristics of such investors include the following:

- direct experience of similar tourism development and marketing, preferably in Mozambique
- sound and appropriate social and environmental policies
- the ability to work well with the PNQ and affected communities
- proven financial resources to successfully undertake development of a concession.

The PNQ will apply selection criteria to determine the suitability of investors in relation to each concession. Tender proposals will only be invited from those investors that the PNQ selects following submission of Expressions of Interest by

¹³ If a tourism concession is not used to its maximum potential, then the benefits to communities (in terms of employment and economic development) and to the PNQ (in terms of tourism entrance fees and support for conservation and park management) will be less than they should be, and will disadvantage the PNQ as a whole.

investors. By demonstrating its determination to seek quality investors, the PNQ will maintain and enhance the park's reputation, further increasing its attractiveness to quality investors.

Tendering process

The PNQ in coordination with COMDEQ and other relevant bodies including MITUR, DNAC and District Authorities, will be responsible for implementing the tendering process for sites in the PNQ that are opened for tourism development. The steps of this process are as follows:

1. Selection of the general areas for tourism development according to the phased tourism development strategy, and definition of guidelines for investors making proposals for tourism development in such areas. The general area of and guidelines for each proposed concession will be agreed by the PNQ in consultation with COMDEQ, Districts and affected communities, and other relevant bodies.
2. Promotion of the general area(s), and invitation of Expressions of Interest from investors;
3. Application of criteria to determine which investors are deemed suitable at this stage. The criteria used will include the level of financial backing / status of each investor; previous experience of similar tourism development and operations - especially in Mozambique; previous experience of community development / community relations; and references from appropriate bodies.
4. Invitation of investors that meet the criteria to identify the exact sites where they would propose to develop tourism within the general areas that have been defined in the PNQ, and to prepare and submit a tender including the following components:
 - a financial bid covering the fees for use of the concession that the investor would propose to pay in addition to the statutory concession fees laid down in Mozambican legislation
 - a tourism bid covering the investor's proposals for development of tourism including exact site location, type of tourism development, size and number of beds, design, marketing and promotion, etc. and associated technical details
 - an environmental bid covering environmental issues and how the investor proposes to address them (including where appropriate, any conservation management agreements)
 - a socio-economic bid covering a financial package for affected communities and proposals for employment of people from local communities, contribution to local community development, working with local communities, etc.
5. Evaluation of tender proposals received from investors with regard to their compliance with the Plano de Maneio, *Regulamentos Internos* do PNQ and PDT, and best overall balance. Affected communities will also be consulted on the proposals received. Based on the evaluation and community consultation, an investor will be selected and invited to prepare a comprehensive plan. If communities do not accept a proposal that would affect them, the proposal could not proceed. The PNQ, COMDEQ and/or affected communities may decide to accept the tender that in their views provides the best balance between the objectives of the park, tourism development and community benefits, etc, and are under no obligation to select the highest financial tender or any of the tenders.

Following evaluation of the tender proposals, one investor may be selected by the PNQ in consultation with COMDEQ and affected communities, to prepare a comprehensive plan for tourism development at a specific site within the general area set by the PNQ. This plan must include business and marketing plans, environmental and social responsibility plans and policies, etc. The selected investor will then apply for a Special Licence and an Environmental Licence and follow the licence procedures in full, and establish a formal, legally-binding Community-Investor Agreements with communities that will be affected by the proposed development. The financial, tourism, environmental and socio-economic bids will be incorporated as a condition of the licence if / when this is emitted following satisfactory completion of the Special Licence procedures. Development may not begin until the Special Licence has been emitted. In addition, a Tourism Licence must be obtained before tourism operations may start.

Licensing Process

The “Special Licence” procedures are fully described in the “Manual de Procedimentos para Emissão de Licença Especial nas Áreas de Conservação de Moçambique” prepared by MITUR’s DNAC. As part of this, applicants must also apply for an Environmental Licence from MICOA, which is required before a Special Licence can be issued by MITUR: the Environmental Licence procedures include preparation of an Environmental Impact Assessment (EIA) by the applicant. The Special Licence and Environmental Licence procedures are shown diagrammatically in Annex 2. Applicants must also comply with Decree 18/2007 (Regulamento de Alojamento Turístico, Restauração e Bebidas) for licensing of tourism businesses, and which includes specific provisions (Article 13 – 14) for licensing of tourism businesses in national parks and conservation areas.

Each tourism operation must comply with the conditions set out in the Special and Environmental Licences that have been emitted for the concession on which it operates. If a tourism operator infringes on the law, does not comply with licence conditions, or operates without an environmental license, the operation can be closed down.

In addition to meeting the requirements for these licences, investors are responsible for complying with all other relevant Mozambican legislation (e.g. relating to tax status, employment, company registration, land management etc.)

Agreements between investors and communities

Formal, legally-binding Community-Investor Agreements must be established by investors with communities, and are a condition for any new tourism development in the PNQ.

These contracts must include, but not be limited to, the following elements:

1. Details for the conduct of community – investor liaison moments and mechanisms for this must be clearly defined
2. A zoning plan indicating the investor’s exclusive use area (concession area), community’s exclusive use area, shared use areas, and any area(s) to which the community is voluntarily suspending its use rights and the period and terms of this voluntary suspension.
3. Details covering village visits by tourists.
4. The direct benefits that the investor commits to providing to the community under this agreement.
5. Provision of education and training for the local community.
6. Provision of employment for the local community.
7. Social responsibility programme including implementation of community development projects and assistance in development of appropriate small businesses and micro enterprises for supply of goods and services to the tourism operations, and for provision of tourism activities (eg. village tours, wildlife viewpoints, etc.)
8. Length of agreement and renegotiation moments
9. Mechanism for conflict resolution that includes committing both sides to mediation by defined mediators and arbitrators, and failing that legally-binding arbitration to avoid the costs and time delays associated with court-based legal procedures.

The PNQ will play an important role in mediating between the investor and community. In particular, the PNQ has an important role in ensuring the protection of communities’ rights in such agreements, and in dealing with legal procedures.

The PNQ will review draft agreements and contracts between investors and communities to ensure that all their provisions are fully compatible with the objectives, management and regulations of the PNQ, and would not cause negative impacts on the services or quality of the operators’ investments, or on social and economic conditions of the local community, or on the environment.

Annex 1 sets out elements for inclusion in community-investor contracts / agreements, and provides examples of the types of community development projects that are found to be effective under the circumstances prevailing in the PNQ, in areas including healthcare, potable water supply, sanitation, education and training, and assistance in developing sustainable small businesses and micro enterprises.

Conservation Management Agreements

Particularly in the inland areas of the PNQ, tourism is being proposed by some operators as a means to partially support private investment in conservation. These operators have been carrying out a variety of conservation activities in coordination with the PNQ Administration that include ranger training, provision of rangers, and work with local communities on conservation of areas of traditional lands.

The PNQ proposes that, subject to approval by the government, investments in major conservation activities made by private operators be incorporated into formal Conservation Management Agreements (CMAs) between these operators, the local communities that may be involved, and the PNQ.

A limited number of tourism activities, which would be defined in the CMA, would be allowed on land covered by a CMA. However, no permanent or semi-permanent accommodation would be permitted in these areas, without a separate Special License for tourism.

The investment in conservation activities made by private operators may in future and subject to government approval be incorporated into formal Conservation Management Agreements (CMAs) between these operators, the local communities that may be involved, and the PNQ. Conservation Management Agreements will be set out in a joint legal agreement between all three parties, regarding land use, access, and other issues of relevance (eg. compensation for elephant damage, relocation of machambas, etc.), and must be equitable for communities, and meet the requirements of the PNQ's management plan and regulations.

The Centro de Promoção de Investimentos (CPI)

The CPI assists the Minister of Planning and Finance by undertaking actions to coordinate the promotion, analysis, follow-up and verification of investments in Mozambique. Once an investor has started the process to apply for a Special License to undertake activities or investments in the PNQ, that investor can initiate the CPI process in relation to this.

The CPI process includes verification of capacity of the applicant to undertake the investment, and their compliance with relevant legislation. This includes the availability of financial resources, previous experience in the sector, and other elements described in the Investment Laws. The CPI will also check that the investor is following the Special and Environmental Licence procedures.

Annex 1: Elements for inclusion in community-investor contracts / agreements

The purposes of community-investor contracts / agreements are:

1. To ensure the best possible relationship between an investor and the local community.
2. To ensure that a liaison committee with real influence is established.
3. To ensure that there are not only direct benefits to the community from an investment, but that these are identified and managed in a transparent and participative manner.
4. To clearly define the obligations, commitments and rights of both parties.
5. To clearly define the rights of both parties to use specific areas, by establishing a zoning plan, including any area to which a community may choose to suspend its user rights and compensation arrangements in respect of this¹⁴.
6. To formalise a commitment to training the local community.
7. To formalise a commitment to employing the local community, according to existing capacity, and to provide education and training to increase local capacity and ability to work in tourism.
8. To create a conflict resolution mechanism that does not involve recourse to the courts.

Community – investor agreements must include the following:

1. Statement of the parties to the agreement (ie. the details of the community and investor who are making the agreement)
2. The period of time covered by the agreement, after which it will be reviewed and renewed for further periods
3. Details for the conduct of community – investor liaison, including:
 - details of the membership of the liaison committee – including representatives of both the community and the investor,
 - the frequency of meetings of the liaison committee,
 - where and when meetings will be held,
 - who will take minutes of the meeting so as to maintain an accurate record of items discussed and agreed actions.
 - terms of reference for implementation of agreement, formulation of code of conduct for tourism, recommendations for employment, voluntary suspension of use of specified areas, management of funds, etc.
 - the way in which any funds for which the liaison committee is responsible will be managed
4. Details of the mediation and then arbitration process (including specified mediators / arbitrators) in cases where the liaison committee is unable to resolve any disputes.
5. A zoning plan indicating investor's exclusive use area (concession area), community's exclusive use area, shared use areas, and any area(s) to which the community is voluntarily suspending its use rights and the period of this voluntary suspension.
6. Details covering village visits by tourists, whether or not they are permitted, and if they are permitted, a code of conduct for village visits.

¹⁴ For example, a community may agree to stop fishing in key diving sites, or not to use a specific beach in return for a fee (preferably attributed to a specific project), which fee could be withheld if the community do not abide by this agreement. This would provide an incentive to the community to abide by the agreement, compensate them for loss of a particular resource, and satisfy the investor's needs, whilst also potentially meeting key environmental needs. Not to mention avoid future conflicts due to misunderstandings.

7. A clear statement of all direct benefits that the investor commits to providing to the community under this agreement. This must include a statement of the form of these benefits (eg. financial, in kind, etc.), the size of the benefits, how often they are disbursed, and the way in which they will be calculated.
8. A commitment by the investor to provide education and training for the local community, including specification of the type of education and training, the numbers of community members for which this will be provided, and a timetable for its provision to the community.
9. A commitment by the investor to provide employment for local community, including specification of the types of employment, the numbers of community members who will be employed, minimum wage levels, and a commitment to ensure gender balance in employment of community members. Employment of any individual community member is subject to reasonable performance of the duties of their employment.
10. The process for identifying, planning and agreeing community development projects (see following section for examples of what may be considered), including the details of implementation (time frame, resources, etc.) and the contributions that each party will make to the project.
11. A commitment by the investor to assist in the development of appropriate small businesses and micro enterprises for supply of goods and services to the tourism operations, and for provision of tourism activities (eg. village tours, wildlife viewpoints, etc.) (see following section)
12. Enforcement mechanisms in the event that either of the parties does not comply with provisions of the agreement.

Community Development Projects and Small Business Support

Each operator needs to individually develop a comprehensive, site specific social responsibility programme, which will be included as an element within the community – investor contract / agreement.

Every tourism establishment needs to employ and train a dedicated community development and relations person, preferably a local individual that fully understands the relevant language, customs and traditions; if possible, this person should form part of a community development department and a community fund/trust/foundation should be established that encourages partnerships with the government and specialist NGOs in this field.

The objectives for a Social Responsibility Programme are as follows:

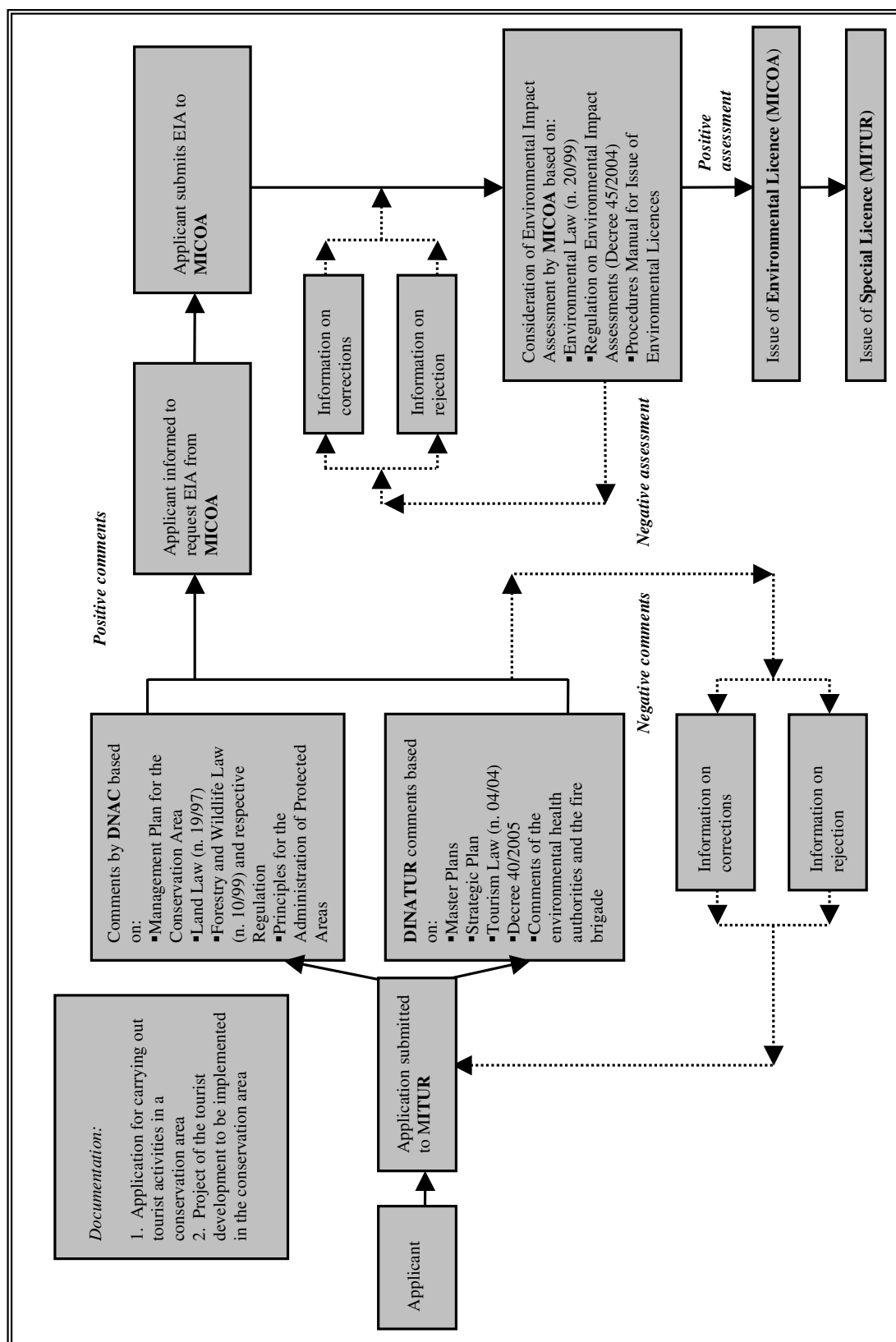
- To support local economic growth, provide economic benefit to local structures and people and encourage local entrepreneurship
- Alleviate poverty through education, capacity building, creation of small, sustainable businesses /micro enterprises, which will increase education levels and the employment potential of the local population, raise their living standards and enable the population to pursue alternative income strategies other than subsistence livelihoods.
- To respect local culture, support sustainable social development and minimize the negative impacts of tourism on the local community
- To establish a Community Development Trust with good fundraising capabilities and transparent, responsible management.
- To implement community development projects according to needs and priorities established by the local communities. Ensure that all prospective projects are fully discussed and approved by all interested and affected parties so as to ensure that the local community, traditional leadership, local, provincial and national governments all “buy into” the projects and assist in ensuring their long term sustainability and success.

The following list provides examples of the types of projects that are found to be effective under the circumstances prevailing in the PNQ. These examples are generic, and any projects based on these examples will need to be planned to be site specific and to be discussed at length with all concerned.

1. Healthcare
 - a. Potable water supply
 - b. Primary Health care
 - c. Assist government in supplying sufficient first aid practitioners, nurses and midwives; subsidize salaries.
 - d. Construction of a clinic and/or maternity ward in conjunction with local government structures, PNQ and communities.
 - e. Malaria prevention

- f. HIV/Aids awareness
 - g. Sanitation
- 2. Education
 - a. Improvement of local schools and schooling facilities in close consultation with local authorities, i.e. construction of class rooms, supply of school benches, writing and learning material, books, etc.
 - b. Scholarships for promising students to attend secondary schools and possibly tertiary education.
 - c. Implementation of a school feeding program.
 - d. Improvement of teachers' facilities and living conditions.
 - e. Adult literacy and numeracy.
 - f. Capacity building, i.e. formation and strengthening of local community associations and relevant management skills; life skills.
- 3. Assistance in developing sustainable small businesses and micro enterprises (site specific)
 - a. Supply of goods and services to the tourism operations – eg. assistance (including basic training in the requirements that the commercial tourism sector has in terms of quality and quantity, assistance with obtaining suitable supplies of materials (eg. seeds for vegetable production) or basic equipment) for development of local business, such as:
 - Vegetable production
 - Fruit production (eg. pineapples)
 - Baked food production (breads, cakes, etc.)
 - Furniture production
 - Handicrafts production
 - b. Working in partnership with the community to develop tourism activities (eg. village tours, wildlife viewpoints, etc.)

Annex 2: Diagram of the procedures for obtaining a Special Licence



Ministério do Turismo, Direcção Nacional das Áreas de Conservação – Manual de Procedimento para Emissão da Licença Especial nas Áreas de Conservação, Novembro 2006

Parque Nacional das Quirimbas was established by the Government of Mozambique in 2002 to protect a rich array of marine and terrestrial habitats, including coastal forests and mangroves, coral reefs, and sea grass beds, and is overseen by the National Directorate for Conservation Areas in the Ministry of Tourism. The Park is now an important destination for tourism in Cabo Delgado Province.

Parque Nacional das Quirimbas covers 7,500 square kilometres, and includes eleven coral islands lying close offshore. Over 50 genera of corals have been recorded within the park, making its reefs the richest in the East African Marine Ecoregion. The terrestrial area comprises a variety of forest types, including miombo woodland, acacia savannah, coastal thicket and tropical dry forest, mangroves, major wildlife populations including elephant, leopard, buffalo, lion and African hunting dog, and rare and endemic plant species.

The Park's goal is to conserve the diversity, abundance, and ecological integrity of all physical and biological resources in the park area, so that they may be enjoyed and used productively by present and future generations. The Tourism Development Plan for the Parque Nacional das Quirimbas sets out how tourism activities are developed and managed to offer world-class tourism in a healthy, protected natural environment, whilst ensuring that the benefits of this growth reach local communities. The Plan presents a clear vision of the steps to take, the responsibilities of all stakeholders, the potential benefits as well as the mistakes to be avoided, and will be an important instrument to ensure the environmental, economic and social sustainability of the Parque Nacional das Quirimbas over the years to come.



PREPARATION OF THE TOURISM DEVELOPMENT PLAN FOR THE PARQUE NACIONAL DAS QUIRIMBAS HAS BEEN SUPPORTED BY THE FOLLOWING ORGANISATIONS:



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