

Country Name	Project for Enhancement of the Capacity of Destination Marketing and Promotion through Strengthening the Linkage among Tourism Related Organizations
Republic of Mozambique	

I. Project Outline

Background	<p>Mozambique has diverse and rich tourism resources, such as beach resorts, natural landscape, historic architecture, and the traditional arts. The government of Mozambique set a target to receive 4 million international tourists annually by 2020 through the abundant tourism resources. Since the number of international tourists, especially from neighboring African countries had been increasing, the revenue from the international tourism accounted for 2% of the Gross National Income in 2010 and it increased from 129.6 million US dollars (USD) in 2005 to 197.3 million USD in 2010. The major destinations of the international tourists are Maputo, Inhambane Province, and Cabo Delgado Province. On the other hand, the tourism industry had not contributed to poverty reduction so much as limitedly benefited to the local economy. For example, although Inhambane was the second major international tourist destination, it was one of the poorest provinces in the country as marked by a high poverty ratio of 57.9%. it was because of the lack of a coherent tourism development strategy and capacity both at national and provincial levels to enhance the local economy.</p>				
Objectives of the Project	<p>Through enhancement of the networking among tourism-related organizations, implementation of trainings on Destination Marketing Promotion (DMP)¹, implementation of pilot projects to develop and improve tourism products, and implementation of seminars to disseminate the lessons learned for other provinces, the project aimed at establishing and sharing the mechanism that tourism resources and tourism industry benefits locals, and thereby benefiting respective local communities economically through implementation of DMP in Mozambique.</p> <ol style="list-style-type: none"> Overall Goal: The implementation of destination marketing and promotion in various parts of Mozambique benefits respective local communities economically. Project Purpose: The mechanism that tourism resources and tourism industry benefits locals is established and is shared. 				
Activities of the Project	<ol style="list-style-type: none"> Project Site: Maputo City and Inhambane Province Main activities: <ol style="list-style-type: none"> Enhancement of the networking among tourism-related organizations, (2) Implementation of training on DMP, (3) Selection and implementation of pilot projects to develop and improve tourism products, (4) Implementation of seminars to disseminate the lessons learned for other provinces, etc. Inputs (to carry out above activities) <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"> <p>Japanese Side</p> <ol style="list-style-type: none"> Experts: 10 persons Trainees received in Japan: 11 persons Training in the third country: 12 persons (South Africa) Equipment: vehicles, photocopier, notebook PC, projector, video camera, and color printers Local expenses: the costs for local staffs, field officers, local consultants for field survey, training, etc. </td> <td style="width: 50%;"> <p>Mozambique Side</p> <ol style="list-style-type: none"> Staff allocated: 25 persons Land and facilities: project offices in INATUR and DPTURI Local expenses: cost for rehabilitation of INATUR, the construction cost of Tourism Information Center of Maputo (BIT), cost of cleaning facilities, the cost for utilities, etc. </td> </tr> </table> 			<p>Japanese Side</p> <ol style="list-style-type: none"> Experts: 10 persons Trainees received in Japan: 11 persons Training in the third country: 12 persons (South Africa) Equipment: vehicles, photocopier, notebook PC, projector, video camera, and color printers Local expenses: the costs for local staffs, field officers, local consultants for field survey, training, etc. 	<p>Mozambique Side</p> <ol style="list-style-type: none"> Staff allocated: 25 persons Land and facilities: project offices in INATUR and DPTURI Local expenses: cost for rehabilitation of INATUR, the construction cost of Tourism Information Center of Maputo (BIT), cost of cleaning facilities, the cost for utilities, etc.
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Project Period	March 2012 – March 2015	Project Cost	(ex-ante) 330 million yen, (actual) 358 million yen		
Implementing Agency	<p>Ministry of Culture and Tourism (MICULTUR: The Ministry of Tourism (MITUR) was reorganized to MICULTUR since January 2015) National Directorate of Tourism (DINATUR) Mozambique Tourism Authority (INATUR) Directorate of Culture and Tourism (DPCULTURI: Directorate of Tourism in Inhambane (DPTURI) was reorganized as DPCULTURI along with the above-mentioned ministerial restructuring)</p>				
Cooperation Agency in Japan	PACET Corporation, PADECO Co., Ltd.				

II. The result of the Evaluation**1 Relevance**

<Consistency with the Development Policy of Mozambique at the Time of Ex-Ante Evaluation and Project Completion>

The project was consistent with Mozambique's development policies of "the Five-Year Government Plan," (2010-2014), "the Strategic Plan for Tourism Development in Mozambique" (2004-2013), "the Strategic Plan for Tourism Sector in Mozambique" (2010-2014) and "Inhambane Provincial Tourism Development Strategy Plan" (2014-2020) aiming at the improvement of tourism by strengthening its strategic role targeting a broader-based inclusive social economic development.

<Consistency with the Development Needs of Mozambique at the Time of Ex-Ante Evaluation and Project Completion >

The project was consistent with Mozambique's development needs of improvement of tourism for making it an impetus for poverty alleviation with a broad-based socio-economic impact. Although it's being highly potential and needed for the local economy, the

¹An approach that aims to benefit local people from a perspective of the locality based on a balance among tourists, tourism-related businesses and the communities that is in the strategic way that responds to the needs of tourists that are compatible to contribute to the economic and cultural development of the communities.

mechanism of DMP using local resources was stagnant due to the shortage of human resources, insufficient knowledge and experience in DMP. There was no change in the needs by the time of project completion.

<Consistency with Japan's ODA Policy at the Time of Ex-Ante Evaluation>

The project was consistent with the 6th Japan-Mozambique Policy Dialogue in March 2011, prioritizing support for local economy including activation of industries. as one of the three priority areas².

<Evaluation Result>

In light of the above, the relevance of the project is high.

2 Effectiveness/Impact

<Status of Achievement of the Project Purpose at the time of Project Completion>

The Project Purpose was partially achieved by the time of project completion. According to the terminal evaluation report and the survey for the ex-post evaluation, the satisfaction level of tourism-related private enterprises towards the public sector's (Indicator 1) was not achieved. The number of tourism-related private enterprises which benefited from new tourism products (Indicator 2) was partially achieved as the participating groups of the pilot projects have been positively engaged throughout the project period..

<Continuation Status of Project Effects at the time of Ex-post Evaluation>

The project effects have been partially continued since the project completion. According to the survey results for the ex-post evaluation, the satisfaction level of tourism-related private enterprises toward the public sector's support did not increased at the time of ex-post evaluation. However, according to the interview with the Inhambane Province Association of Tourism, although improvement on responses and actions have been limited and slow because of bureaucracy and corrupt practices by customer and policy agents, communication and collaboration among the public and private sectors have been enhanced.. With respect to the Tourism Information Centers (TIC) constructed by the project in Maputo City and Inhambane Province; (1) TIC in Maputo City has been being operated under the Directorate of Culture and Tourism of Maputo City although the Municipality of Maputo City sought possibility to outsource some tourism-related operation and management to the private sector. (2) TIC in Inhambane Province has not been adequately operated and the DPICULTURI called for the public and private partnership for operation and management of the TIC, but the private sector has been reluctant to the terms for the outsourcing and cost-sharing of the TIC.

During the field survey for the ex-post evaluation, all the 5 groups participating in the pilot projects (26 members)³ answered that activities of the pilot projects have been sustained by the groups themselves. That is because they perceived that the activities have yielded more returns and their business have become profitable compared to the level of the ex-ante evaluation. The concrete number of the private enterprises which benefited from the new tourism products was not available at the time of ex-post evaluation. However, the 26 members of the groups of the pilot projects has sustained since the project completion although the tourism industry has been stagnant partly because of the political instability in 2015 and the Cyclone DINEO in 2017.

<Status of Achievement for Overall Goal at the time of Ex-post Evaluation>

The Overall Goal has been partially achieved at the time of ex-post evaluation. According to the survey results for the ex-post evaluation, 2 out of 3 indicators for the Overall Goal have not been achieved. As for the actual number of tourists (foreign) to Mozambique (Indicator 1), the annual growth rate has remained substantially less than the corresponding GDP growth rate from 2015 to 2017. The reasons for the decreases in the number of tourists are; a decline in public order and security from a longstanding political and military turmoil in 2015, also DINEO cyclone hit and damaged the infrastructure in early 2017, and a notable decrease in foreign investment to tourism. The number of the local community which is targeted to produce new tourism products (Indicator 2) has remained the same in the target site of Inhambane Province although the number of new tourism products has increased. In addition, 6 communities in other provinces have started producing the tourism products, such as honey, arts and crafts, chili and horticulture production. The number of communities and the number of tourism products have slightly increased. The income of habitants of the local community which is targeted to produce new tourism products (Indicator 3) was not confirmed by number both in Inhambane and other provinces, but according to the interviews with the members of the 5 local groups at the time of ex-post evaluation, they recognized that their income increased as mentioned above.

<Other Impacts at the time of Ex-post Evaluation>

Some positive impacts were confirmed although limited in scale at the time of ex-post evaluation. According to the interviews with 5 local groups participated in the pilot projects, the Association of Josina Machel de Mutamba and the Association 7 de Abril de Siquiriva mainly consist of women that suggest active women participation. Some interviewees in the groups pointed out that they could improve their living conditions by connecting utilities such as water and electricity and could provide education for their children. Also, some have noted that they contribute to increasing their household income. In the meantime, rest assured that no negative impact was confirmed.

<Evaluation Result>

In light of the above, the effectiveness/impact of the project is fair.

Achievement of Project Purpose and Overall Goal

Aim	Indicators	Results
(Project Purpose) The mechanism that tourism resources and tourism industry benefits locals is established and is shared.	(Indicator 1) The satisfaction level of tourism-related private enterprises towards the public sector's support increases.	Status of the Achievement: Not achieved (Not continued) (Project Completion) Although a platform of starting dialogues between private and public sectors, such as Tourism Forum and two working groups in Inhambane province and Marketing Committees at the central level, the private sector commented at the time of terminal evaluation that support of the public sector had not reached a satisfactory level and then there was no positive change observed until the time of project completion. (Ex-post Evaluation)

² MOFA, ODA Data book (2011) pp.671-672.

³ (1) Association of Josina Machel de Mutamba, (2) Association of 7 de Abril de Siquiriva, (3) Litanga Travel, (4) Accosication of Vuka Arte de Vilankulo, (5) Vilatours de Vilankulo)

		<ul style="list-style-type: none"> No improvement in the satisfaction level of the private sector to the public sector. Communication and collaboration between the public and private sectors have been enhanced though improvement on responses and actions by the public sectors to the private sectors have been still limited and slow and there have still been bureaucracy and corrupt practices by costumers and policy agents. 																																			
	<p>(Indicator 2) The number of tourism-related private enterprises which benefited from new tourism products increases.</p>	<p>Status of the Achievement: Partially achieved (Partially continued) (Project Completion) While participants of the pilot projects had experienced various impacts as a result of diverse training and close technical support, effects were not yet accumulated to the extent to influence others in the communities at the time of terminal evaluation due to the delay of the operationalization of the pilot projects. (Ex-post Evaluation) All the 5 participating groups (16 members) of the pilot projects answered that activities of the pilot projects have been sustained as they become profitable and yield more returns. However, the number of private enterprises which benefited from the new tourism products developed by the project was not available. (Reference) [The number of tourism-related private enterprises in Inhambane Province]</p> <table border="1" data-bbox="699 622 1469 712"> <thead> <tr> <th></th> <th>2015</th> <th>2016</th> <th>2017</th> </tr> </thead> <tbody> <tr> <td>National</td> <td>90</td> <td>90</td> <td>90</td> </tr> <tr> <td>Foreign</td> <td>315</td> <td>317</td> <td>245</td> </tr> </tbody> </table> <p>(Source) Registration of Tourism Enterprises (2015-2017) and interview during the Field Survey</p>		2015	2016	2017	National	90	90	90	Foreign	315	317	245																							
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<p>(Overall Goal) The implementation of destination marketing and promotion in various parts of Mozambique benefits respective local communities economically.</p>	<p>(Indicator 1) The number of tourists to Mozambique increases by more than GDP growth rate to 10% per annum.</p>	<p>(Ex-post Evaluation) Not achieved</p> <table border="1" data-bbox="794 831 1445 981"> <thead> <tr> <th>Indicator 1</th> <th>2015</th> <th>2016</th> <th>2017</th> </tr> </thead> <tbody> <tr> <td>Annual GDP growth rate (%)</td> <td>4.1</td> <td>2.3</td> <td>2.2</td> </tr> <tr> <td>Annual Foreign Tourists growth rate (%)</td> <td>0.7%</td> <td>-6.0%</td> <td>N/A</td> </tr> </tbody> </table> <p>Supplemental information Annual Number of Tourists in Mozambique and Inhambane Province (2014-2016)</p> <table border="1" data-bbox="699 1061 1533 1200"> <thead> <tr> <th>Region</th> <th>Tourist</th> <th>2014</th> <th>2015</th> <th>2016</th> </tr> </thead> <tbody> <tr> <td rowspan="2">Mozambique (Total)</td> <td>Nationals</td> <td>264,292</td> <td>257,031</td> <td>207,987</td> </tr> <tr> <td>Foreigners</td> <td>272,597</td> <td>256,077</td> <td>240,833</td> </tr> <tr> <td rowspan="2">Inhambane</td> <td>Nationals</td> <td>9,235</td> <td>3,398</td> <td>3,028</td> </tr> <tr> <td>Foreigners</td> <td>16,787</td> <td>4,918</td> <td>4,538</td> </tr> </tbody> </table> <p>(Source) National Statistic Yearbook -2015-2016 /Number of the guest by nationality- Major destination provinces in Mozambique</p>	Indicator 1	2015	2016	2017	Annual GDP growth rate (%)	4.1	2.3	2.2	Annual Foreign Tourists growth rate (%)	0.7%	-6.0%	N/A	Region	Tourist	2014	2015	2016	Mozambique (Total)	Nationals	264,292	257,031	207,987	Foreigners	272,597	256,077	240,833	Inhambane	Nationals	9,235	3,398	3,028	Foreigners	16,787	4,918	4,538
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		communities/ tourism related enterprises (communities)	(Madjadjane, Matchia, Canhane, Zinave)	(Madjadjane, Matchia, Canhane, Zinave, Mussapa, and Tsetsera)	(Madjadjane, Matchia, Canhane, Zinave, Mussapa and, Tsetsera)	(Madjadjane, Matchia, Canhane, Zinave, Mussapa and, Tsetsera)
		No. of the tourism products (Category)	5 (Honey, Arts and Crafts, cultural trade fair, Chili Production, Horticulture Production)	5 (Honey, Arts and Crafts, cultural trade fair, Chili Production, Horticulture Production)	5 (Honey, Arts and Crafts, cultural trade fair, Chili Production, Horticulture Production)	5 (Honey, Arts and Crafts, cultural trade fair, Chili Production, Horticulture Production)
	(Indicator 3) The income of habitants of the local community which is targeted to produce new tourism products increase.	(Ex-post Evaluation) Partially achieved Inhambane Province: Increased according to the interviews with 20 stakeholders (DPCULTURI, PP1, PP2, PP3, PP4, PP5) Synergy for improvement of marketing for potential customers (brochures), better price (craft) and quality of products (brand image) contributed for increase in the income of local communities although there was no significantly increase in the number of tourists. Other provinces: No information available.				

Source : Answered Questionnaire by DINATUR and Key Informant interviews with DPCULTURI, Interview during the field survey with 20 samples from DPCULTURI (4 interviewed) and the 5 groups participating in the pilot projects (16 members interviewed)

3 Efficiency

Although the outputs were produced, and the project period was as planned (ratio against the plan: 100%), the project cost exceeded the plan (ratio against the plan: 108%). The reason that the project cost increased by the Japanese side was that it covered the major part of travel costs and allowances for counterpart personnel of the DINATUR and DPCULTURI. Therefore, the efficiency of the project is fair.

4 Sustainability

<Policy Aspect>

Tourism promotion has remained one of the key components of development policy of the country. “The Five-Year Program of the Government for 2015-2019” mentioned a strategic role of tourism for socio-economic development of the country. They also have addressed the sectoral importance as follows; “The Strategic Plan for Tourism Development in Mozambique” (2015-2024) has aimed to increase the competitiveness of the tourism sector, taking full advantage of its potential and providing quality services which would contribute to creating synergy for other economic activities. “The Strategic Plan for Tourism Sector in Mozambique” (2015-2024) has also set ten strategic goals including improvement of tourism-related products, service delivery, marketing, and a mechanism to convey tourism information, as well as awareness creation to local populations.

<Institutional Aspect>

The DINATUR, INATUR, and DPTURI which had been the implementing agencies under the Ministry of Tourism during most of the project period were integrated into the Ministry of Culture by the administrative reform in 2015, thereby to date, they have been the administrative arm of the MICULTUR. Regardless of the ministerial restructuring, these implementing agencies have remained engaged in implementation and dissemination of DMP. The DINATUR’s role has been to coordinate dissemination of DMP at Cabo Delgado, Nampula, Gaza and Maputo Province by the National Director and 2 Technicians. The INATUR has been in charge of project management with the Director of marketing and promotion services and a Technician of marketing. The DPCULTURI, formerly DPTURI, has been monitoring and supporting local pilot projects and coordinates with the private sector for promotion activities through the Inhambane Province Hotel and Tourism Association (AHTPI). According to the survey results, for all the agencies, they have had the counterpart(s) trained by the project still stay in full-time position and function. They also perceive that manpower has been sufficiently secured.

<Technical Aspect>

According to the survey results, all the agencies perceive they have sustained the capacity to implement DMP. With respect to the type of capacity by the organization, the DINATUR addresses the capacity for development of manuals. The INATUR has the capacity to develop the training and the DPCULTURI has the capacity to develop a brochure and method for training local people. The reason for the retention of the capacity, most counterpart trained in the project still have remained in place and at the DPCULTURI, in particular, they have transferred the knowledge to new technical staff. Regarding the manuals developed by the project for disseminating DMP known as “Inhambane model”, they responded that it had been utilized at provincial seminaries, promotion activities on media and monitoring of pilot projects.

<Financial Aspect>

Despite an inclusive approach to develop tourism being placed in the third priority area under the promotion of employment and improvement of the production and competitiveness in “the Five-Year Program of the Government” (2015-2019), the budget has not been sufficiently secured to operationalize it even after the ministerial restructuring and public reform affected by hidden debts of public companies in 2015. On the other hand, although no state budget has been allocated, the DINATUR and INATUR could conduct DMP activities for development of their brochure and participating to two tourism trade fairs (Annual Tourism Business --INDABA in South Africa and Mozambique International Trade Show--DESCUBRA) by mobilizing development partner’s budgetary support. At the provincial level, public entities are able to mobilize donors’ financial support for the implementation of activities as the DPCULTURI had a record of their budget earmarked for the DMP activities, including the international fair and tourism promotion, for the period from the fiscal year of 2015 to 2018. Although the budget amount decreased from 35.697 million metical (MZN) in 2015 to 28.422 million MZN, the budget of 15.818 million MZN has been still secured in 2019 even in the fiscal crisis of the country.

<Evaluation Result>

In light of the above, some problem has been observed in terms of the financial aspect of the implementing agency, therefore, the sustainability of the effects through the project is fair.

5 Summary of the Evaluation

The project partially achieved the Project Purpose and the Overall Goal for DMP on the effective and sustainable basis. As for the sustainability, the necessary budget has not been sufficiently secured for training and extension of DMP if without donor's support. As for the efficiency, the project cost slightly exceeded the plan.

Considering all of the above points, this project is evaluated to be partially satisfactory.

III. Recommendations & Lessons Learned

Recommendations for Implementing Agency:

- (1) As at the time of the ex-post evaluation, the operation of TIC in Maputo City and Inhambane Province were in inadequate conditions considering the way that was originally presupposed (such as to provide accurate information to tourists), due to the lack of proper management and a failed recruitment and assignment of qualified technical staff. Taking these into consideration to fill the gap in service delivery, it is desirable that the revision of the operation policy should be carried out for the practical use of the TIC.
- (2) As most of the full-time counterparts still involved in the project at the DINATUR, INATUR, and DPCULTURI remained in place (technical capacity), they should recognize that there is a continued funding need for a technical support to the member of the Pilot Project to be full-fledged "best practice cases" in the Inhambane DMP model and thereby to promote the dissemination of the model to other provinces, including other districts in Inhambane province.

Lessons Learned for JICA:

The project was a comprehensive tourism development project and it was implemented by 3 governmental entities (from two central and one state governmental agencies). It was decided that the project was implemented under the management of the DINATUR as a leading implementing agency taking full responsibility for entire implementation in a form of a project steering committee. However, in a country where the central ministries (DINATUR and DPCULTURI) and the state governmental agencies (INATUR) have equal status and hold each executive power of own budget and disbursement, they tend to be highly protective of their scope of authority and reluctant to transfer it (e.g. cost-sharing among related agencies was not allowed during the implementation), as observed as an institutional barrier caused its funding inflexibility. It thus must have required the implementing agency at the central level (DINATUR) to have the stronger authority to the extent that enables to put in place a sustainable project funding scheme in advance. It is thus recommended that JICA should take a lead to build a management system of project coordination and to ensure active engagement and involvement of all parties to implement funding plan and cost-sharing among them right after the 1st year of project implementation.



Equipment procured by the project



Vuka Arte Associations product