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THE EVOLUTION OF THE TOURISM SECTOR IN MOZAMBIQUE: MANAGEMENT AND IMPACT OF PUBLIC POLICIES

Sílvia Solinho António Belo Dezebrom

Master's Student in Public Administration
Catholic University of Mozambique

Carlos Xavier Francisco Dezebrom

Doctoral Student in Political Science and International Relations
Catholic University of Mozambique

Edson Manuel Emas Uenganai Moyo

Master's student in Public Administration
Catholic University of Mozambique

Beatriz Júlio Domingos

Master's student in Public Administration
Catholic University of Mozambique

Arminda Botão Gonçalves Cardoso

Master's student in Administration
Catholic University of Mozambique

Mauro Moisés Camisa Matope Mbwela

Master's student in Public Administration
Catholic University of Mozambique



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Abstract: The research on the evolution of tourism in Mozambique: management and impact of public policies has the general objective of analyzing the evolution of the tourism sector in Mozambique with a focus on the management and impact of public policies. The specific objectives are, first, to describe the tourism management process in Mozambique, secondly, to assess the impact of public policies on the tourism sector in Mozambique, and finally, to relate the management and impact of tourism in Mozambique. The study employs a qualitative, exploratory, and descriptive methodology using documentary analysis and bibliographic research to understand the trajectory of tourism in Mozambique. The documentary analysis included public policies, legislation, and government reports, while the bibliographic research included articles, books, and reports on sustainability, economics, infrastructure, and governance in tourism. Tourism in Mozambique grew after the economic reforms of the 1990s and 2000s, involving investment in investments and consolidating the sector as a development strategy. The country still faces structural limitations such as transport infrastructure and governance failures that hinder competitiveness in relation to more consolidated destinations such as South Africa and Kenya. Sustainability is a current challenge, with initiatives seeking to reduce environmental impacts and promote social inclusion. To consolidate itself as a competitive destination, Mozambique needs to continue investing in infrastructure and preservation policies, reinforcing its image in the global market.

Keywords: Evolution, Tourism, Management, Public Policy.

Introduction

The article developed within the scope of the research has as its theme the Evolution of the Tourism Sector in Mozambique: Management and Impact of Public Policies. Mozambique has a rich cultural diversity and natural resources that make the country a promising tourist destination. However, despite its potential, the sector faces a number of obstacles, including private infrastructure that compromises accessibility and safety for tourists and a lack of workforce training that limits the quality of services offered and, consequently, the competitiveness of the destination. Innovative public policies over the last few decades have played a crucial role in the evolution of the sector, but they have not always been persuasive. Fragmentation and lack of coordination between different levels of government (local, provincial, and national) have resulted in scattered efforts that have been unable to improve tourism potential. Although there are external policies for sustainable tourism, their implementation is often compromised by immediate economic interests, causing environmental and cultural damage that affects the visitor experience and the integrity of local resources. Tourism management is also impacted by several factors that create a scenario of inefficiency, such as the lack of integration between tourism and other sectors such as agriculture and culture, which prevents the development of richer and more diversified tourist experiences. Many benefits of tourism do not reach local communities, resulting in social inequality and conflicts between residents and tour operators. The concentrated management of tourism activities can generate a feeling of social and economic exclusion, undermining the har-

monious development of the sector. The consequences of implementing public policies result in significant social, economic, and environmental impacts. The exploitation of tourism resources may benefit only a small elite, while local communities face socioeconomic challenges. The uncontrolled growth of tourism can lead to poor environmental management, affecting local ecosystems and biodiversity, which in the long term compromises the sustainability of the sector itself. This raises the following question: What are the main public policies that have shaped the tourism sector in Mozambique in recent years?

This research will contribute to understanding the interactions between public policies and tourism management by exploring three main perspectives. Natural Resource Management Theory analyzes how tourism can be integrated with environmental conservation by promoting practices that preserve environmental heritage while benefiting the economy; Sustainable Development Theory investigates the relationship between tourism and the Sustainable Development Goals (SDGs), focusing on how tourism policies can contribute to poverty reduction, the promotion of equality, and environmental conservation. Governance Theory assesses how governance structures impact the effect of policies in the sector, emphasizing the importance of transparency and community participation in resource management.

The implications are broad and involve several intersections. The research will provide valuable information for the creation of public policies tailored to the needs of the sector and communities, encouraging sustainable and inclusive practices. Entrepreneurs in the tourism sector will be able

to appropriate their business strategies by promoting responsible practices that respect local communities and the environment. Local communities will be empowered to participate in tourism management, allowing them to claim their rights and benefits arising from the development of the sector and . The study will provide a solid foundation for academics and researchers, expanding knowledge about tourism management and its interactions with public policies, contributing to the advancement of sustainable tourism.

The tourism sector in Mozambique has principles that date back to the colonial era, when the country was seen as an exotic destination due to its rich biodiversity, vibrant culture, and stunning landscapes. After independence in 1975, a civil war had a devastating impact on tourism, causing a sharp decline in the flow of international visitors and damage to tourism infrastructure. During the 1990s, with the signing of the peace agreement and political stabilization, the country began to rehabilitate the sector by promoting its tourism potential as part of its economic development strategy.

Over the years, the government has implemented various public policies for tourism, supporting its importance for economic growth and job creation. Initiatives such as the development of strategic tourism plans and the creation of tourist zones were introduced to encourage investment in the sector. However, problems persisted, such as the lack of adequate infrastructure, professional training, and the need for environmental conservation, which limited the full development of tourism.

The tourism sector faces a dynamic scenario, albeit one fraught with challenges. The country is renowned for its natural

beauty, including idyllic beaches, national parks, and a rich cultural heritage, which attract tourists from around the world. The implementation of public policies focused on sustainable tourism has been a priority, seeking to balance economic growth with the protection of natural resources and the inclusion of local communities.

Tourism management still faces difficulties, such as poor road conditions and a lack of basic services, which affect the visitor experience. The COVID-19 pandemic has had a profound impact on the sector, resulting in a sharp drop in visitor numbers and forcing the industry to adapt to new realities, such as the demand for sustainable tourism and personalized experiences.

Although the government has promoted policies for the recovery of tourism, the implementation of these policies is still a challenge. Coordination between different levels of government and the active participation of local communities in tourism management are critical aspects that need to be improved. The need for professional training in the sector and the promotion of sustainable tourism practices are imperative to ensure that the sector not only recovers but also prospers in a responsible manner.

The research aims to analyze the evolution of the tourism sector in Mozambique, with an emphasis on the management and impact of public policies implemented over time. It also seeks to describe how the tourism sector in Mozambique has developed historically, highlighting the main advances and setbacks, to understand the role of public policies aimed at tourism by examining the strategies taken by the government to promote the sector, and finally to identify the socioeconomic and environmental impacts of public policies, addressing how

they influence the local economy, employment, social inclusion, and environmental preservation.

The study on the evolution of the tourism sector in Mozambique and the impact of public policies that regulate it is essential, as tourism has great potential to contribute to the country's economic, social, and environmental development. In recent years, the country has been recognized for its vast natural and cultural heritage, which could transform it into one of Africa's main tourist destinations. Sustainable tourism development depends on the implementation of public policies that promote the conservation of natural resources, the inclusion of local communities, and the promotion of economic opportunities. A detailed analysis of how public policies have impacted the management and growth of the tourism sector is relevant to guide future government actions and development strategies.

The research is relevant to various stakeholders, such as policymakers, entrepreneurs in the sector, local communities, and academics. For government officials, the study provides input for the creation of policies based on governance and sustainability practices that contribute to the balanced development of tourism.

One of the limitations is related to the COVID-19 pandemic, which has profoundly impacted the tourism sector, altering patterns and trends that are still adjusting, which may hinder the understanding of long-term impacts and the availability of information, which is very scarce.

Literature Review

Tourism

Cooper, Fletcher, Fyall, Gilbert, and Wanhill (2008), Goeldner and Ritchie (2002), and Hall and Page (2014) note that tourism is a key sector for the economic and social development of various regions around the world, with an impact on the GDP of several countries. Tourism also plays an important role in job creation, encouraging infrastructure development and cultural appreciation. In recent years, new trends such as sustainable tourism, ecotourism, and cultural tourism have gained prominence in response to the demand for tourism practices that respect the environment and promote the well-being of local communities.

Tourism Sector

The UNWTO (2019) and Tribe (2003) note that the tourism sector encompasses several areas that go beyond the simple act of traveling, including transportation, accommodation, food, entertainment, and recreational activities. Globally, the sector has been considered a regional development, bringing investment, appreciation of local culture, and business opportunities.

Public Policies

According to Dredge and Jenkins (2007) and Elliott (1997), public policies presented to tourism aim to promote the balanced development of the sector, ensuring economic, social, and environmental benefits for communities. These policies include regulation, financial incentives, marketing, and infrastructure development, as well as strategies for preserving cultural and environmental heritage. Well-structu-

red policies can contribute to tourism becoming a sustainable driver for the economy while promoting social inclusion and cultural appreciation.

Evolution of the Tourism Sector in Mozambique

Since independence, tourism in Mozambique has gone through several stages of development, initially marked by a period of low priority within economic policies. In the beginning, the country's infrastructure, including transportation and accommodation, was limited and ineffective in sustaining tourist flows, mainly due to the government's focus on essential development issues and economic recovery. This situation worsened during the civil war (1977-1992), which hampered internal mobility and deterred potential visitors, making tourism a marginal activity in the national economy (Strategy for Tourism Development in Mozambique 2004-2013; and Harrison, 1995).

With the end of the civil war, the country embraced a series of political and economic reforms aimed at reconstruction and economic diversification, in which tourism was gradually included as a sector with the potential to contribute to GDP. The 1990s and 2000s brought with them economic liberalization policies that encouraged foreign investment and cooperation with international partners. In this situation, tourism was recognized as an important tool for economic growth and infrastructure development in deprived regions, promoting a revival of the sector and paving the way for initiatives that favored job creation and environmental conservation (Strategy for Tourism Development in Mozambique 2004-2013; and Harrison, 1995).

Christie and Crompton (2001) and Alcobia (2016) note that the reforms laid the foundation for tourism to be gradually considered strategic within the economy. Several international cooperation programs also began to see tourism as a lever for sustainable development, especially in protected areas with high ecological potential, such as nature reserves and the country's coastline. Thus consolidating the basic structure for the revitalization of tourism and enabling the sector to expand in a more structured manner in the following decades, even though new governance and sustainability problems were emerging.

Contemporary Expansion and Current Trends

Over the last two decades, the tourism sector has experienced a period of expansion driven by the construction of high-end resorts, the modernization of airports, and the creation of policies that promote sustainable tourism. Alongside private investment, the government has launched advertising campaigns aimed at attracting international tourists, seeking to highlight the country's natural beauty and rich cultural diversity. The expansion of the sector is also reflected in the diversification of tourism offerings, which now include ecotourism, cultural tourism, and adventure tourism, positioning Mozambique as an attractive destination in the Southern African region (Silveira, 2005; National Strategy for Sustainable Tourism Development 2016-2025; and Spenceley, 2012).

Silveira (2005), National Strategy for Sustainable Tourism Development 2016-2025; and Spenceley (2012) note that current trends show a growing focus on sustainable tourism practices that seek to

align economic growth with the conservation of local ecosystems and , and the empowerment of communities. Ecotourism, for example, has gained prominence with the development of natural parks such as Gorongosa National Park, which has received investments to restore biodiversity and attract visitors interested in ecological experiences. Cultural tourism, which promotes the country's tangible and intangible heritage, has been increasingly encouraged, helping to preserve traditions and generate employment in local communities.

An important factor in the sector's expansion has been bilateral tourism agreements with other countries, facilitating the visa application process and promoting travel packages that benefit the Mozambican economy. These agreements not only increase the flow of tourists but also encourage partnerships that bring modern technologies and management practices to the tourism sector. The expansion of tourism in Mozambique therefore shows a strong trend of sustained growth, even in the face of problems such as the need for better infrastructure and competition with other African destinations (Silveira, 2005; National Strategy for Sustainable Tourism Development 2016-2025; and Spenceley, 2012).

Public Policies for Tourism in Mozambique

Government Policies to Encourage Tourism

The World Bank (2013) and Spenceley (2008) note that the government's tourism incentive policies have been crucial in strengthening the sector by promoting a favorable investment environment and increasing

the country's international visibility. The Strategic Plan for Tourism Development, for example, highlights the importance of integrating sustainability and social inclusion into the expansion of tourism infrastructure. This plan includes measures that facilitate the licensing process, encourage the creation of new tourism companies, and promote the preservation of areas of ecological and historical interest.

These policies include financial and tax incentives that attract foreign investment for the construction of hotels, resorts, and other tourism facilities. This openness to foreign capital facilitates the growth of the sector and generates resources for public infrastructure such as roads and airports. A monitoring structure has also been established to assess the impact of tourism activities on the environment, seeking to balance development with the preservation of protected areas and the mitigation of environmental damage (UNWTO, 2017; and Rogerson, 2004).

These government policies have also had a positive impact on gross domestic product (GDP), with the tourism sector representing a growing part of the country's economy. The implementation of policies to encourage tourism stands out as one of the central strategies for achieving more inclusive economic development, generating direct and indirect jobs and promoting local entrepreneurship. Based on these incentives, tourism has consolidated its position as a strategic area for the country's economic and social development (Strategic Plan for Tourism Development, 2016-2025; and Ashley, 2000).

Public-Private Partnerships and International Incentives

Christie, Fernandes, Messerli, and Twining-Ward (2013) and Spenceley (2012) note that public-private partnerships (PPPs) are a fundamental part of the tourism sector's growth strategy, especially with regard to infrastructure development. Collaboration between the government and private companies has enabled the creation of resorts, improved access to tourist attractions, and the development of facilities in remote areas. In addition to bringing financial and operational benefits, these partnerships have been fundamental in promoting more competent management focused on the demands of the international tourism market.

International incentives and financing also play a role in the tourism sector, including programs from the United Nations (UN) and the World Tourism Organization (UNWTO) that aim for sustainability and inclusive development. Non-governmental organizations (NGOs) and other international organizations have contributed with training, technologies, and policies that help create a stronger and more resilient tourism sector. These collaborations have been vital in enabling the country to maintain its commitment to sustainable development, ensuring that tourism growth does not harm biodiversity and natural resources (UNWTO, 2020; and UNWTO, 2017).

These international investments and partnerships also reinforce Mozambique's commitment to the Sustainable Development Goals (SDGs) by integrating tourism with environmental preservation and the development of local communities. Collaboration with international organizations and the promotion of public-private partnerships (PPPs) have been fundamental in creating a more attractive environment for tourists while promoting sustainable and

inclusive tourism (UNWTO, 2020; and UNWTO, 2017).

Socioeconomic and Environmental Impacts of Public Policies

Economic Impact of Tourism

Tourism is one of the sectors with the greatest potential to leverage the country's economic growth by generating direct and indirect jobs and promoting the development of other industries. The expansion of the sector has boosted the growth of local commerce with the opening of new businesses such as restaurants, craft shops, and transportation services, which directly benefit local communities. Recent data show that tourism contributes to GDP, demonstrating its direct economic impact and its potential for transformation (Strategic Plan for the Development of Sustainable Tourism in Mozambique 2016-2025; and Spenceley and Snyman, 2017).

Spenceley and Snyman (2017) and Kimbu and Ngoasong (2013) note that the tourism sector plays an important role in infrastructure development with investments in roads, airports, and communications that benefit both tourists and the local population. This development facilitates access to previously isolated areas and encourages mobility and trade between regions, stimulating economic growth in different sectors. The multiplier effect of tourism also extends to the service sector, where increased demand for local products generates new opportunities for small entrepreneurs.

Social Impact and Promotion of Culture

Tourism in Mozambique also has a positive social impact by promoting and enhancing local culture and heritage. In various regions, visitors are exposed to Mozambican cultural expressions and traditions such as music, dance, gastronomy, and handicrafts, which help to reinforce the country's cultural identity. This process of cultural appreciation contributes to the preservation of cultural practices that, without the incentive provided by tourism, could be at risk of disappearing due to the pressures of globalization and modernization (Strategic Plan for the Development of Sustainable Tourism in Mozambique, 2016-2025; Spenceley and Snyman, 2017; and UNWTO, 2020).

Spenceley and Snyman (2017) and Kimbu and Ngoasong (2013) note that tourism has the potential to promote social inclusion by providing new economic opportunities for communities that previously did not benefit from economic activities. Small local entrepreneurs such as artisans and tour guides find in tourism a direct source of income, strengthening the family and community economy. The empowerment of these communities is reflected in greater financial autonomy and the appreciation of their knowledge and cultural resources, making them active participants in Mozambique's economic development.

Environmental Impact and Sustainability

BIOFUND (2019) and Spenceley and Snyman (2017) note that despite the economic and social benefits, tourism presents environmental challenges that require pu-

blic policies focused on sustainability. The degradation of coastal and marine ecosystems, especially in areas of high visitation, is a growing concern, as activities such as beach tourism and diving, when unregulated, can cause irreversible damage to natural habitats. Pollution generated by the increase in tourist infrastructure, such as resorts and roads, also threatens biodiversity and puts pressure on the country's limited natural resources.

Public policies play a crucial role in promoting sustainability by creating specific regulations to protect natural areas and encourage environmentally friendly practices among tour operators. Successful examples include the creation of environmental protection areas and the promotion of low-impact tourism practices. However, these efforts still face challenges such as the need for greater oversight and the effective involvement of local communities, which, if properly trained, can become guardians and direct beneficiaries of sustainable tourism in Mozambique (BIOFUND, 2019; and Spenceley and Snyman, 2017).

Management Challenges in the Tourism Sector in Mozambique

Institutional Challenges and Management Capacity

Strategic Plan for the Development of Sustainable Tourism in Mozambique 2016-2025 and Dieke (2003) note that the management of the tourism sector in Mozambique faces a number of institutional challenges that limit the growth and competitiveness of tourism in the country. The lack of adequate infrastructure such as modern

roads and airports hinders access to places with great tourism potential, discouraging visits by international tourists and reducing connectivity between regions. In addition, bureaucracy and administrative inefficiencies in the licensing process and in the granting of incentives to tourism enterprises discourage investment and directly affect the sector's ability to compete globally.

Another significant challenge is the lack of coordination between different government agencies, which results in inconsistent policies and fragmented management of tourism resources. The absence of a centralized structure to oversee tourism development and regulation slows down and undermines the decision-making process. The creation of a stronger governance entity could help align the efforts of different agencies, promoting more integrated development of the tourism sector (UNWTO, 2020; and Strategic Plan for the Development of Sustainable Tourism in Mozambique, 2016-2025).

Regional and Global Competition

Frederico and Matlaba (2018) and Dieke (2003) note that Mozambique faces competition from other African tourist destinations such as South Africa, Tanzania, and Kenya, which have well-established tourism infrastructure and strong marketing strategies. The geographical proximity of these countries and the similarity of their natural attractions create a scenario in which Mozambique needs to differentiate itself to attract tourists. Despite having idyllic beaches and rich biodiversity, the country still lacks an international tourism promotion strategy that highlights its unique features and attracts specific niche markets.

However, these policies must be accompanied by practical measures to improve the tourist experience in the country, such as strengthening public safety and simplifying the processes of entry and stay in the country. Combined, these initiatives could put Mozambique in a more competitive position on the international stage, capitalizing on its natural beauty and cultural heritage (Christie, Fernandes, Messerli, and Twinning-Ward, 2013; and Frederico and Matlaba, 2018).

Workforce Qualification and Training

The World Bank (2018) and UNWTO (2020) note that workforce skills are critical to the competitiveness of the tourism sector, as the visitor experience is directly influenced by the level of service received. In Mozambique, the lack of professional training and capacity building in the tourism sector is an obstacle to the development of high-quality services, negatively impacting the country's image. The shortage of skilled workers mainly affects areas such as hospitality, gastronomy, and tour guiding, where interaction with visitors is constant.

Recognizing this need, the Mozambican government has implemented public policies to promote professional training in the sector in partnership with educational institutions and the private sector. Training programs, technical courses, and partnerships with foreign companies have been promoted to train the local workforce, raising the standards of quality in tourist services. The creation of specialized training centers and support for technical education in tourism are fundamental steps to ensure that the sector develops in a sustainable and

competitive manner (World Bank, 2018; and UNWTO, 2020).

Methodology

This study explores the evolution of the tourism sector in Mozambique, with an emphasis on the management and impact of public policies, in order to understand tourism development and the role of government policies in this process. A structured methodology appropriate to the topic is proposed.

Research Paradigm

The study is based on a qualitative paradigm appropriate for exploring contextual characteristics such as the evolution of tourism in Mozambique. The paradigm allowed for an understanding of the social, cultural, and economic aspects involved in the development of the sector, facilitating a critical analysis of public policies and their impacts. The qualitative method provides methodological flexibility, allowing for the exploration of the interpretations of the actors involved in the tourism sector.

Type of Study (Method)

The research is described as an exploratory and descriptive study using the inductive method typical of qualitative methodologies. The inductive method allowed an analysis to be constructed from observations and analyses of specific data, seeking patterns and trends regarding the impact of public policies on the tourism sector. Through this method, it was possible to build an understanding of tourism development in Mozambique, based on the interpretation of the data collected.

Data Collection Methods and Techniques

To meet the research objectives, qualitative data collection methods were used, including document analysis and bibliographic research. Document analysis: this method included the collection and analysis of public policies, legislation, reports, and official documents from the Mozambican government related to tourism. The analysis of public documents allowed us to explore changes in the sector's policies and strategies over time, identifying government guidelines and approaches to tourism development. Bibliographic Research: a bibliographic search containing scientific articles, books, reports from international and national organizations, and academic studies discussing the tourism sector in Mozambique and Southern Africa. Through a systematic review, the contributions of different authors on topics related to sustainability, economics, infrastructure, and governance in the tourism sector were explored. The bibliographic research provided the theoretical basis and a critical analysis of the information and trends observed in the sector.

Inclusion and Exclusion Criteria

Inclusion Criteria

The inclusion criteria for the materials and data selected for the study were official documents, laws, and public policies directly related to tourism in Mozambique, published by government institutions or international organizations, academic studies, scientific articles, theses, and dissertations addressing the development of the tourism sector in Mozambique, preferably in the last 20 years, and reports from tourism and economic development organizations analyzing the impact of public policies on the sector.

Exclusion Criteria

The exclusion criteria defined to ensure the importance and accuracy of the information were publications that address tourism outside Mozambique unless they make relevant regional comparisons, materials of low reliability or non-academic, such as blogs, opinion content without scientific review, and publications more than 20 years old with no current relevance.

Research Material

The research material was selected according to its relevance to the topic. The sources selected sought to provide a broad overview of the tourism sector, focusing on the implementation of public policies and their economic and social impact. The research was based on academic books, scientific articles published in indexed journals, government and international organization reports, and relevant case studies contributing to a critical analysis of the tourism sector in Mozambique.

Ethical Aspects

Ethical aspects were rigorously considered to ensure the integrity of the research and the reliability of the data found, as well as to protect all those directly or indirectly involved in the research process. As this was a bibliographic and documentary study, ethical issues were addressed in accordance with the principles of academic research ethics.

Conclusion

The trajectory of the tourism sector in Mozambique mirrors the dynamics of growth and transformation that the country has faced since independence. Initially marginalized in economic policies and severely impacted by the civil war (1977-1992), tourism only began to be valued on the national scene with the economic reforms of the 1990s and 2000s. This new focus included efforts to attract foreign investment, revitalize infrastructure, and consolidate tourism as a strategic tool for economic and social development. The contemporary expansion of the sector, with an increase in resorts, improved access, and the creation of national parks, represents an important milestone for tourism in Mozambique, positioning the country as an up-and-coming destination in Southern Africa.

The evolution of the tourism sector has not been without structural and institutional challenges. The transport infrastructure essential for access to tourist areas is still limited in several regions, which compromises connectivity and the flow of tourists. Additionally, issues such as bureaucracy and coordination between different government agencies reveal governance failures that hinder a unified vision for the sector's development. The lack of a centralized entity for tourism management and regulation compromises agility in decision-making and policy implementation, undermining the country's competitiveness vis-à-vis more established destinations such as South Africa, Kenya, and Tanzania.

Another important point of discussion is sustainability. Although tourism is a promising avenue for economic growth, it also poses environmental risks, especially in co-

astal areas and areas of high biodiversity such as Gorongosa National Park. Public policies focused on sustainability play a crucial role in minimizing these impacts with initiatives that regulate activity in protected areas and encourage low-impact tourism practices. However, the enforcement of these regulations and environmental monitoring still face limitations, including insufficient human and financial resources, as well as limited community adjustment. Empowering local communities to act as guardians of the environment and direct agents in sustainable tourism can contribute to slowing environmental damage while promoting social inclusion and cultural appreciation.

An analysis of recent trends shows growth in sustainable tourism and diversification of tourism offerings such as ecotourism and cultural tourism. These practices not only respond to international demand for authentic and ecological experiences but also promote more inclusive and participatory development, benefiting local communities and preserving Mozambican cultural traditions. For tourism to consolidate itself as an economically viable and sustainable sector, it is essential that Mozambique continues to invest in infrastructure, environmental preservation policies, and institutional improvements.

Regional and global competition poses an additional challenge: the need to strengthen the country's image as a unique tourist destination. Marketing strategies focused primarily on ecotourism and luxury tourism can help Mozambique stand out in a highly competitive market. Iconic destinations such as the Bazaruto Archipelago have the potential to attract high-end tourists and diversify the visitor base, which would also reduce dependence on specific markets and increase the sector's resilience.

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