

COMOROS

Tourism Sector Review:

Discovering the tourism potential of natural wonders



July 2013



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Acronyms and Abbreviations

ACT	Association Comorienne du Tourisme
AFD	Agence Française de Développement – French Development Agency
AGTC	Association des Guides Touristiques des Comores
ANACM	Agence Nationale de l’Aviation Civile et de la Météorologie
ANPI	Agence Nationale pour la Promotion des Investissements
APTA	Association des Professionnels du Tourisme d’Anjouan
BCC	Banque Centrale des Comores – Comoros Central Bank
CGH	Comoros Gulf Holding
COMESA	Common Market for Eastern and Southern Africa
DNTH	Direction Nationale du Tourisme et de l’Hôtellerie
ECDD	« Engagement Communautaire pour le Développement Durable » Project
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GUC	Gouvernement de l’Union des Comores
HAH	Hahaya Prince Saïd Ibrahim Airport
COI /IOC	Commission de l’Océan Indien – Indian Ocean Commission
ISPS	International Code for the Security of Ships and Port Facilities
KMF	Francs Comoriens – Comorian Francs
LDC	Least Developed Country
MEM	Maison de l’Ecotourisme de Mohéli
MMP	Mohéli Marine Park
NGO	Non-Governmental Organization
OACI	Organisation de l’Aviation Civile Internationale
ONTC	Comoros National Tourism Board – Office National du Tourisme des Comores
QNH	Qatar National Hotels – Katara Hospitality
SCRP	Stratégie de Croissance et de Réduction de la Pauvreté
SIDS	Small Island Developing States
UCCIA	Union des Chambres de Commerce, d’Industrie et d’Agriculture
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organization
WTTC	World Tourism and Travel Council

Overview

The Union of Comoros has struggled through political unrest for over thirty years. As a result, its tourism sector is still in the exploration phase of its life cycle. There have been initiatives by both the public and private sectors in the tourism industry, but to date, a lack of commitment from both sectors and external circumstances have prevented further growth. Comoros needs a Tourism Development Plan that will provide a framework for all tourism stakeholders to the next phase of development. Strong institutional leadership from both the public and private sectors is one of the most important requirements to be addressed in order to support tourism in Comoros.

SECTION I

Introduction to the Comoros Study

1.1 Background

1. The Union of the Comoros consists of three of the four main islands in the Comoros archipelago: Grande Comore, Anjouan and Mohéli. The fourth island, Mayotte, is a French overseas department and is not part of the Union of the Comoros. However, Mayotte plays an important role in the area's tourism as many international flights are operated through Mayotte and it is promoted as being part of the "Comoros".
2. The Union of the Comoros is among the poorest and smallest states in the world. It has been at the crossroads of many civilizations and has close links with the northern islands of the Mozambique Canal (Nosy Be, Zanzibar and Pemba) and Eastern Africa. It has had a troubled history since independence in 1975, marked by several coups d'état that have had a negative impact on economic growth, poverty reduction and on the destination's image.
3. The Comoros has the required tourism capital to become a destination of its own as do the other Indian Ocean islands. Its natural heritage is characterized by white sand beaches, turquoise seas and exceptional conservation areas. Comoros also has a rich history and strong identity, with deeply rooted traditions and specific social structures. In addition, the population has a natural sense of hospitality.
4. Given Comoros' strong tourism assets but low number of tourist arrivals, it is clear that it is not achieving its full tourism potential. Current tourism policies and infrastructure are far from adequate. Each of the three islands needs a different approach and development plan, as they all have distinct and specific opportunities. For example, yachting and cruise tourism are major opportunities for Mohéli Island.
5. Over the last 15 years, the number of tourists on the Comoros has continued to decline, from 27,500 in 1998 to 17,500 arrivals in 2011, due to political unrest and growing insecurity. Since 2002, Visiting Friends and Relatives (VFR) tourists from the Comorian diaspora in France have represented more than 50% of arrivals mostly thanks to the "Grand Mariage" celebrations from July to September. Tourism development that was initiated in the early 1990s by Sun Resorts on the Galawa site now seems a distant memory and the various attempts to revive this project since 2005 are still yet to yield any results.

6. There is a need to diversify the sources of revenue for the Comoros economy and provide more job opportunities. In this context, there is considerable potential for expansion of the tourism sector for revenue generation. Tourism could be a powerful growth and poverty reduction tool as it has in the past. Ten years ago, one hotel, the *Hotel Galawa*, employed 500 people.

7. Tourism opportunities have been researched in a number of studies to date. Choosing the best model for each island, coordination across the islands and implementing plans has not yet commenced. Comoros has cultural and historical links with Mayotte, Kenya, Tanzania (Zanzibar), Mozambique (Pemba) and Nosy-Be in Madagascar. Yet, the country is a “greenfield destination” and remains to be established as a tourism destination. In response to the main tourism development issues, a first step could be to develop a critical mass of lodging entities through a major investment in Grande Comore followed by implementation of a detailed plan for developing ecotourism in Mohéli.

1.2 Objective of this Review

8. The objective of this review is to conduct an analysis of the tourism sector performance and policies in the Union of Comoros. It presents policy options and recommendations at a country and sub-regional level. This review has been constructed as part of a larger Indian Ocean regional tourism integration study including similar reports on the tourism sectors of Seychelles, Mauritius and Madagascar. Combined recommendations provide a basis for practical approaches towards improved tourism competitiveness through leveraging regional integration opportunities across these economies.

FIGURE 1: MAP OF COMOROS



Source: CIA Factbook

SECTION 2

Overview of the Union of Comoros Tourism Sector

2.1 Tourism's Contribution to the Economy

CONTRIBUTION TO GDP

9. Official data do not provide estimates of actual contribution of tourism and hospitality in terms of percentage of Gross Domestic Product (GDP) to the Comorian economy. Available figures are aggregated with commercial activities and indicate a total contribution of 17.6% in 2009. In the same year, studies have estimated the contribution of tourism to be EUR 23 million in 2009, representing 6.1% of GDP. For comparison, tourism revenues account for 8.3% of GDP in Mauritius and 25.0% in Seychelles.

TAX INCOME

10. The Investment Code provides for an income tax credit up to the amount of effective investment and a reduction of import taxes on equipment, materials and inputs for a period from 7 to 10 years. Taxes generated by tourism come from indirect taxes like sales or bednight taxes and are used to cover municipalities or destination promotion costs.

TOURISM RECEIPTS

11. Tourism receipts have grown strongly over the years and in fact almost doubled between 2003 and 2011 (mostly due to VFR) and compensate in some way for the decline in arrivals.

TABLE 1: TOURISM RECEIPTS, 2006 – 2010 (MILLIONS USD)

	2003	2004	2005	2006	2007	2008	2009	2010	2011
Arrivals	14,229	17,603	19,551	17,060	14,582	14,753	11,306	15,251	18,765
Tourism receipts	18.18	22.66	25.01	28.18	29.10	33.40	30.10	34.87	39.50

Source: Comoros Central Bank – BCC (2013)

12. To increase and better monitor tourist expenses, existing payment systems such as credit cards, Automated Teller Machines (ATMs) and online payments can be developed further. Systems to evaluate the actual contribution of tourism to the economy could be progressively implemented in the national public accounting.

JOB CREATION

13. Most Comorian tourism documents report that the hospitality industry has created about 500 jobs, with a ratio of 0.99 jobs per lodging room. This is relatively low since 30% of the total accommodation capacity is represented by guesthouses. Hotels and restaurants represent about 80% of direct jobs, with the remainder spread across other tourism sub-sectors (travel agencies, airlines and inbound agencies). Feedback from tourism private sector stakeholders indicates that they often informally hire temporary staff and student interns to cope with significant fluctuation in tourism activities during the year.

14. A common theme which comes up across all three islands is the low level of staff qualification. The staff is either not trained or when they are, the qualifications do not match the needs of the employer. The largest hotels hire former Galawa Beach staff or implement in-house training when they have the technical and financial means. Most hotels simply do not conduct any training.

15. Wages vary from KMF 40,000 (EUR 80) to KMF 150,000 (EUR 300) for unskilled workers according to their position; it can reach KMF 700,000 (EUR 1,400) for executives. Regulations in Comoros do not impose any minimum wage, but it is generally estimated at KMF 30,000 (EUR 60). These wage levels are commensurate to that in other Indian Ocean countries, which have different levels of development. Specifically, they are two times higher than Madagascar and two times less than in Mauritius or the Seychelles.

16. Due to the low level of development of sectors linked to tourism, indirect jobs are estimated to be on a one-to-one ratio to direct employment, i.e. at about 500. The usual ratio in other more developed economies and tourism destinations is about 3:1.

2.2 Tourism Offering and Sector Performance

TOURISM OFFERING

17. Of the three islands in Comoros, most tourism development has taken place on the largest island, Grande Comore, where the capital city, Moroni, is located. The main airport and all major hotels are located in Grande Comore. Each of the three islands has their own uniqueness and offers different attractions. There is an opportunity to organize inter-island circuits.

18. Grande Comore is a beautiful volcanic island dominated by Mount Karthala (2361 meters), one of the world's largest and most active volcanoes, which offers great walking and climbing with stunning views of the scenic coastline. Moroni, the capital and port gives a good idea of the island's history and Arab-Swahili heritage. The main market is a mini version of Zanzibar's famous Stone Town before its restoration. The waterfront could benefit from renovations such as painting, demarcation, parking spaces and landscaping. The coastline is fringed with world-class coral reefs, magnificent lagoons and white sand beaches especially the three northernmost beaches at Le Galawa and Maloudja. There is potential for scuba, snorkelling, reef and wreck diving, deep-sea fishing and all types of water sports. Trou du Prophète is a cove in the north where, according to legend, Mohammed himself sought refuge on one of his journeys. Lac Salé is an interesting example of a very deep salt-water lake formed in a steep-sided volcanic crater.

19. Mohéli is the smallest island of the archipelago and is located half way between Grande Comore and Anjouan. The beaches are pristine and attractive (Nioumachoua, Moimbasa, Sambia, Itsamia). The main characteristic is a unique and relatively unspoilt natural environment with an endemic emblematic fauna (Roussette of Livingstone, dugongs, humpback whales, and marine tortoises). Local communities hope to transform the island into an ecotourism destination which currently receives just an average of 390 tourists per annum. A study conducted in 2006, aimed to assess the success of current tourism initiatives on Mohéli, identified priorities for sustainable development of the sector based on both tourist and local communities' perceptions. La Maison de l'écotourisme was built in 2004 to inform the visitors and train the village community to manage the site. Agence Française de Développement (AFD) is presently financing a study to protect the Marine Park.

20. Anjouan is called "l'île aux parfums" because of the ylang-ylang tree plantations. The landscape consists of mangroves, mountains, lakes and plantations. The density of population is very high and environmental concerns are emerging. Mutsamudu has the most important medina of Comoros, a citadel and the main port of the island that has potential to be a port of call for cruise ships.

ARRIVALS

21. Assessing specific tourism sector performance in Comoros is difficult; the Comoros National Tourism Office does not compile or publish tourism statistics. The UNWTO published basic Comoros arrivals data up to 2007. WTTC produced a tourism satellite account report for Comoros in 2012 utilizing models to estimate the economic impact of tourism. Statistical analysis is complicated by the inconsistent inclusion or exclusion of Mayotte.

22. Since Galawa Beach Hotel closed in 2000, arrivals declined rapidly, compounded by political instability which gave a negative image of the country and the destination. This decrease is mainly due to the decrease in numbers of leisure tourists (as main purpose of travel). VFR tourists fluctuated between 7,000 and 12,000 arrivals per year, and business travel remained stable between 3,000 and 4,500 per year. The major hotels in Moroni continue to operate but with a much reduced market, explaining high levels of pricing.

23. In 2002, the figures between leisure tourists and VFR tourists reversed due to the rapid decline of leisure tourists between 2000 and 2004 without any effective recovery in the following years.

TABLE 2: COMOROS ARRIVALS, 2000 – 2011

Year	Non residents	Growth (%)	Motivation (%)				Tourists	Business men	Total clients
			Leisure	VFR	Business	Other			
2000	23, 893		54.7	32.4	8.8	4.1	13,069	2,103	15,172
2001	19, 356	-19.0%	40.0	36.4	15.3	8.3	7,742	2,961	10,704
2002	18, 702	-3.4%	18.7	50.5	22.9	7.9	3,497	4,283	7,780
2003	14, 229	-23.9%	9.1	75.2	9.8	5.9	1,295	1,394	2,689
2004	17, 603	23.7%	13.8	64.3	17.2	4.7	2,429	3,028	5,457
2005	19, 551	11.1%	13.6	64.8	16.1	5.5	2,659	3,148	5,807
2006	17, 060	-12.7%	18.0	56.8	15.9	9.3	3,071	2,713	5,783
2007	14, 582	-14.5%	10.0	47.9	30.0	12.1	1,458	4,375	5,833
2008	14, 753	1.2%	19.0	42.7	28.4	9.9	2,803	4,190	6,993
2009	11, 396	-22.8%	22.9	32.3	26.0	18.8	2,610	2,963	5,573
2010	15, 251	33.8%	15.6	52.4	21.3	10.7	2,373	3,251	5,624
2011	17, 463	14.5%	14.3	52.6	23.3	9.8	2,497	4,069	6,566

Source: DNTH (2012), BCC (2013)

24. Arrivals figures highlight key aspects of visitor volumes and motivation. According to 2009 figures, the French represented 64% of arrivals in the Comoros with 7% coming from Reunion and another 7% from Mayotte. These figures include the French Comorian diaspora. The remaining 36% is relatively evenly distributed among other countries. As can be seen, Comoros depends heavily on the French market but actual numbers are so small that the opening of a new air route to France or other source markets can change the entire market structure. According to official statistics, the average length of stay is 7 days. This is much lower than in the other countries of the Indian Ocean (i.e., 10 days in Mauritius and the Seychelles, 20 days in Madagascar).

AIR ACCESS

25. Hahaya Prince Saïd Ibrahim Airport (HAH) on Grande Comore is the oldest and main international airport of the archipelago. In 2006, the AFD financed its upgrade (e.g. improvement in the runway security and air control system to meet OACI standards). The 2,900-meter runway still presents

some challenges for handling larger carriers. The Chinese Government recently financed the construction of the new terminal and the parking area. The USAID supported the entrance visa delivery system at the airport.

26. The airports of Mohéli and Anjouan each have a 1,300-meter runway. Only visual landings are possible at these two airports. Since 2012, Inter Iles Air operates regional flights between Anjouan and Mayotte but on a very irregular basis. Comores Aviation does not operate anymore.

TABLE 3: COMOROS FLIGHT FREQUENCY, IATA WINTER 2011/12

Airline Company	Route	Flights / week	Aircraft	Capacity
African Express	Nairobi – Mombasa – Moroni	1	DC 9	32
Air Austral	Réunion – Moroni (via Dzaoudzi)	2	B737-800	184
	Dzaoudzi – Moroni	2	B737-800	184
Air Madagascar	Antananarivo – Moroni	3	B737-300	130
	Antananarivo – Anjouan	1	B737-300	48
Comores Aviation	Moroni – Antananarivo	2		
	Anjouan – Antananarivo	1		
Kenya Airways	Nairobi – Moroni	3	Embraer 190	98
Precision Air	Dar es Salam – Moroni	1	B737-300	130
Yemenia	Sana'a – Moroni	2	A310	210

Source: ANACM (2012)

27. The French Comorian diaspora travels mainly in July and August and there is thus very limited seat availability for other travellers during this period. The ticket rates from Paris during this high season can be as high as EUR 2,000.

MARKET POSITIONING

28. Despite the wide and rich opportunities offered by the country's landscapes, the development of tourism activities (tours, hikes, diving) remains limited to basic, low quality offers. The country's poor infrastructure has been a major obstacle for the development of tourism in the Comoros. When the *Hotel Galawa* was still operational, some tour operators organized excursions to the Karthala volcano and tours of Grande Comore. The areas most frequented by tourists, apart for the beaches of the hotels *Galawa* and *Itsandra*, were the beaches of Chomoni and Bouni, the salt lake and the turtle island on Grande Comore.

29. Comoros is still a destination with low visibility on the global tourism market and is sold by a limited number of travel agencies and Tour Operators (TO). This is in contrast to the neighboring island of Mayotte which is marketed by most French TOs specializing in Africa and the Indian Ocean; very few of these TOs offer an extension to the Comoros. The strong potential for the Comoros to develop nature-based tourism is not leveraged. The tourism offering is essentially a seaside mono-product, which puts the Comoros Islands in competition with many other tropical island destinations. Operators are generally of the opinion that Mayotte needs to be included in the promotion of Comoros to take advantage of infrastructure and complementary tourism products.

30. For the few tourism packages that are promoted for Comoros, most have a "Nature & Discovery" theme and include natural sites (Mohéli Marine Park and the Karthala volcano), historical monuments (sultan palaces) and cultural site visits (medina) on at least two islands offering interaction with local people through suggested accommodation (guesthouses or community managed bungalows) or social project visits. Very few water and sport activities (diving, game fishing, quad or bike excursions tours,

trekking, etc.) are available since there are no services providers and inter-island transportation is mainly by air as regular boat shuttles have stopped since 2012.

31. The 12-day package rate varies between EUR 2,500 and 4,000 (flights included) depending on the season, which is a high price for a "backpacker" stay. Comoros can also position itself in niche markets based on the archipelago specificities. It is already famous for turtle nesting thanks to an important piece of work by the Réunion-based *Kelonia* research center. The bird watching market can also be interesting given the large number of endemic birds in the country provided that watching conditions in conservation areas are good. This type of market has developed in Madagascar and it is possible to organize combined packages if the access and pricing conditions are reasonable.

ACCOMMODATION

32. Each island of the Comoros archipelago has its own attractions and thus the accommodation sector on each island has also developed somewhat differently. Hotel supply on the three islands differs: Ngazidja and Anjouan have similar accommodation types concentrated in capital cities, while Moroni and Mutsamudu focus largely on business travellers. The proportion of rooms intended for leisure tourists is greater on Mohéli, due to its "nature-based tourism" positioning thanks to the Mohéli Marine Park (MMP).

TABLE 4: ACCOMMODATION CAPACITY PER ISLAND (2012)

Accommodation Type		Ngazidja		Moheli		Anjouan		Total	
Classified hotels	Hotels	4	31%	1	5%	3	16%	8	15%
	Rooms	131	67%	12	11%	84	42%	227	45%
Non classified hotels	Hotels	1	8%	5	25%	4	21%	10	19%
	Rooms	16	8%	53	49%	50	25%	119	24%
Guest houses	Hotels	8	62%	14	70%	12	63%	34	65%
	Rooms	48	25%	43	40%	66	33%	157	31%
Total accommodation	Hotels	13	100%	20	100%	19	100%	52	100%
	Rooms	195	100%	108	100%	200	100%	503	100%
Distribution per island		39%		21%		40%		100%	
Average rates (EUR)		66		21		32		43	

Source: DNTH, Anjouan Tourism Office, Alter Ego (2012)

33. Discussions with hoteliers indicate that occupancy rates are low ranging between 25% and 50%. This barely allows the hotels to breakeven due to high operating costs and a great disparity during high and low seasons. Small hotels tend to do better because of limited fixed costs. Most hotels depend on individual clients since groups are difficult to handle because of transportation difficulties. The average room rate at the national level is EUR 43, which is reasonable but masks disparities between small accommodation options offering EUR 15 rates and major hotels offering EUR 140 rates.

CRUISE AND YACHTING TOURISM

34. The Comoros has not been included in the Indian Ocean cruise itineraries for several reasons. It retains an image of a high-risk country with significant political instability; port infrastructure is not adequate to accommodate cruise even in the best climatic conditions; cruise lines are not always in

contact with local incoming agencies and informed about the possibilities for excursions or ground activities; and visa administrative procedures can be complicated. There are only a few cruise ship calls in Moroni annually.

TABLE 5: CRUISE SHIPS IN MORONI PORT, 2004 – 2013

YEAR	CRUISE SHIP	ARRIVAL	DEPARTURE	ORIGIN	DESTINATION	PASSENGERS
2004	Hebrideard	07/02/04	07/02/04	Mayotte	Kenya	62
	Deutschland	17/02/04	17/02/04	Longoni	Nosy Be	49
2009	Astor	12/02/09		Dzaoudzi	Dar es Salam	463
2010	Colombus	09/12/10	09/12/10	Singapour	Mutsamudu	267
	Bremen	21/11/10		Pesroche	Mamoudzou	146
2012	Clipper Odyssey	04/03/12	04/03/12	Mayotte	Zanzibar	104
	Deutschland	28/12/12	28/12/12	Longoni	Longoni	424
2013	Albatros	05/02/13	05/02/13	Mayotte	Tuléar	726

Source: Comoros Port Authority (2013)

35. Yachting activities are limited in the Comoros as very few boats are registered and procedures for foreign registered boats are unclear and vary according to the island and even the officer-in-charge. Mayotte yachts have decided to boycott Comoros after repeated incidents between boat owners and the public administration.

INTER-ISLAND CONNECTIVITY

36. The connections between neighboring islands by sea are poorly developed and a hindrance to tourism development. Sea connections depend on cargo or small boats which have poor safety records. The crossing of the Mozambique canal is also difficult. Due to risks of hurricanes from November to March and the monsoon in June, inter-island navigation is of great interest only in April, May, September and October. To understand the opportunities and constraints for inter-island yachting, a full feasibility study would be necessary.

37. The air connections between the three islands still need development. Three companies, Inter Iles Air, AB Aviation and Comores Air Assistance operate domestic flights as best as they can given operating conditions: some crashes have occurred, flight schedules are not always respected and cancellations are frequent.

2.3 Institutional Framework

38. A Tourism Law was adopted in December 2011 to address hotel licensing and classification as well as destination promotion issues. The Investment Code came into force in 2007 to promote Foreign Direct Investment (FDI) and tourism is among the eligible activities. However, there is still no legal framework to guarantee and protect investments. Lack of transparency on tender bids and specifications is a major issue for potential investors.

39. Access to land is a central factor for growing a tourism sector. The Union of Comoros' land tenure system is still new. There is no land cadastre which is a major concern for tourism development, and land ownership rules still need to be clarified.

40. Environmental issues are defined by the 1994 Environment Law that was amended in 1995 and 2001, but so far no enforcement decrees have been adopted. Taking into account the extreme vulnerability of the coastline zones, updated legislation and policies are necessary not only for tourism development but also for all economic activities.

PUBLIC SECTOR AND DONOR ACTIVITY

41. An additional layer of complexity lies in planning and policy development and implementation as each island in the Comoros is autonomous. The entities in charge of tourism on each island must consult and coordinate closely to bring together all public and private sector stakeholders.

42. At the national level, tourism falls under the Telecommunications, ICT Promotion, Transport and Tourism Ministry, which oversees the National Tourism and Hospitality Department (DNTH). The latter has a limited annual budget of KMF 3.2 million (USD 9,000) and is responsible for the implementation of tourism policies, data collection and processing, and support to tourism project developments. At the regional level, each island has its own Tourism Department under the supervision of Regional Ministries.

43. A further complication is that the national Tourism Ministry is not always involved in agreements with international investors related to state-owned properties that are negotiated by other Ministries and public entities.

44. International donors are present and willing to help in tourism development. AFD is promoting ecotourism and supporting the protection of the Marine Park of Mohéli. AFD also financed the extension of the airport of Mohéli. The United Nations Development Programme (UNDP) supports the Document de Stratégie de Croissance et de Réduction de la Pauvreté (DCSRP) with the “Projet cadre intégré Renforcé” associated to “Programme de lutte contre la pauvreté”. They have placed tourism among their five pillars namely ecotourism development (with NGOs), vulnerable areas and Coelacanth Park protection, promotion and training. The Common Market for Eastern and Southern Africa (COMESA) has recently commissioned a consultant to work on a tourism strategy. The European Union has financed a few projects. The World Bank’s cooperation with the Comoros was suspended in 1993 and re-engaged in 2009.

45. The March 2010 Doha Conference modified the landscape in the Comoros with the arrival of non-traditional donors from the Gulf countries and their different operating approaches. In this arena, aid coordination and harmonization is a challenge and merits attention as a key objective of the donors.

46. The coordination of aid to the Comoros for tourism is limited. Donor engagement is the responsibility of Commissariat Général au Plan which is understaffed. To benefit from the greater involvement of Gulf based private partners following the Doha Conference, establishing a sector working group could be a useful initiative.

PARASTALS

An important provision of the 2012 Tourism Act calls for clarification in the areas of the rules of governance and the provisions of the General Tax Code (CGI) and the Investment Code, the creation of the Comoros National Tourism Office (ONTC) and a Special Tourism Development Fund to finance the ONTC and DNTH in addition to budgetary allocations. The ONTC Statutes still have to be defined as to

whether it will be a public institution or an autonomous one. In addition, links with the Regional Tourism Offices also need to be clarified.

47. The current Tourism Act implies that the Ministry of Tourism is responsible to act as a Destination Marketing Office (DMO) at national and local levels with delegation to the ONTC. As destination marketing will need to be of high priority in the coming years to reposition Comoros on the global tourism market, it is important to make clear the responsible entity.

PRIVATE SECTOR ASSOCIATIONS

48. The private sector tourism stakeholders are represented by different associations at both national and regional levels. The Comorian Tourism Association (ACT) is a business association established in 1990 and has about 60 members nationwide. The ACT budget is limited to membership fees and is about KMF 2.5 million (7,250 USD) annually. A new leadership team was elected in 2012 and an action plan for the next two years is being drafted focusing on strengthening the operational capacities of the ACT.

49. The Union of Chambers of Commerce and Industry (UCCIA) has created an informal "Tourism Club" providing logistical and technical support to the ACT and aims to be a partner of the Government for regulatory issues. The UCCIA contributed to the reduction of entry visa requirements, the drafting of the Tourism Act and to the lobbying for its adoption in partnership with the ACT.

50. Anjouan and Moheli islands have their own private sector associations, respectively the Association des Professionnels du Tourisme d'Anjouan (APTA) and the Maison de l'Ecotourisme de Moheli (MEM). They face management problems due to a lack of financial resources and the spreading of members between various locations and activities.

51. The guides recently created a national association in December 2012, the Association of Tourism Guides of Comoros (AGTC) with 27 members from the three islands. Their objective is to promote the Comoros tourism capital and to protect tour guides' interests within the industry.

52. In general, the Comorian tourism private sector does not speak with one voice because most associations are not fully and permanently operational: executive teams work as volunteers and do not have the capacity to develop projects and look for resources. In addition, most actions are organized at a central level because of a weak communication system and do not always match members' needs such as capacity building or marketing.

2.4 Participation in Tourism Regional Integration Initiatives

53. Comoros is a member of the Indian Ocean Commission (COI), as is Madagascar, Mauritius, France (for Réunion and Mayotte) and the Seychelles. COI aims to encourage regional cooperation in several fields including tourism. The integration of handicraft in the IOC program has contributed to the development of woodcarving, pottery, basketry, and embroidery in Comoros.

54. The Comoros National Tourism Office has committed to be a member of the Vanilla Island Organization (VIO) to take part in joint marketing activities. More recently in 2012, the Comoros joined the Mozambique Channel Program with Mayotte, Zanzibar, Nosy Be and Mozambique that aims to strengthen the commercial links between the various islands and has a tourism component for product development, regional transport and vocational training. Comoros is also member of COMESA and is the most southerly member of the Arab League.

55. The Government of the Comoros Union (GUC) has signed agreements with various international companies such as the Kuwait-based Comoros Gulf Holding (CGH), which has committed to invest EUR 10 million for the expansion of the Itsandra Hotel (now leased to Cristal Hospitality). CGH also announced a EUR 140 million real estate project at the “Lac Salé” called *Djanat-El-Kamar* (Comoros Paradise). Inter-island transportation was expected to improve with a CGH USD 5 million project in inter-island travel. To date none of these projects are operational.

56. Other agreements were signed between the GUC and foreign investors to develop hospitality and tourism projects on existing state-owned properties, like the USD 70 million project on Galawa and Maloudja sites in the Grande Comore through a joint venture with Katara Hospitality (formerly known as New Qatara Hotels). The scheduled opening is projected to be in 2015.

SECTION 3

Key Issues

57. Some challenges continue to constrain tourism development in the country. Even though tourism has been mentioned as a priority sector in most official documents including the 2009 Growth and Poverty Reduction Strategy, no major decisions or effective actions have taken place to foster tourism development.

3.1 Tourism Policy and Plan

58. Political will still does not translate into concrete actions: private partners that were identified to become locomotives for the tourism sector have failed and the DNTH budget is totally inadequate to oversee the development of the sector. To regain private sector confidence, the GUC will have to make concrete steps to demonstrate its commitment to tourism development.

PRINCIPAL CHALLENGES

Lack of Vision and Visibility

59. A Tourism Development Plan was developed in 2005 to be presented to the Donor Conference, held in Mauritius that year. It was, however, more a Marketing Plan than a Tourism Master Plan and did not address physical development (land planning and zoning, and related infrastructure) and investment facilitation and promotion issues. No real follow-up of the Mauritius Conference occurred until a similar conference was organized in Doha in 2010.

Investment Climate remains Unclear

60. Comoros still has an image of political instability and the lack of security in the land registration system exacerbates the difficulty to attract national and foreign direct investments. The implementation of the ANPI, the definition of an Investment Code and the effectiveness of OHADA regulations should have resulted in an improvement of the business environment and tourism governance (transparent management of state assets, enforcement of contracts), but this is not the case. The number of new hotel and tourism investment projects is still low, and existing accommodation capacity is still limited in number and quality to meet the required critical mass for tourism development.

61. The Galawa Beach operational experience and subsequent attempts to resume hotel activities on that specific site show that it is important in the long term to diversify development models and not to rely on one type of tourism or on one group of investors or operators.

Poor Public Infrastructure and Services

62. Logistical management remains complicated in the Comoros and the limited market does not allow significant investment at both public and private levels. Work is underway on the three islands to improve access roads but examples of successful public-private partnerships in the areas of air access and internal transport are lacking. Initiatives for bus, boat and plane shuttles to main tourist sites are struggling to be profitable; they are nevertheless essential to ensure the mobility of tourists and to allow geographical distribution of economic spill-overs, infrastructure and employment. Public services like solid waste management or airport welcome services, which are critical for tourism, are lacking.

3.2 Institutional Capacity Building

63. Tourism is a transversal sector that involves a plurality of stakeholders in both public and private sectors. While institutional and economic reforms are on-going to build the Comoros governance system, strong leadership and coordination at the institutional level are also critical due to the complexity of national and island institutions.

PRINCIPAL CHALLENGES

Weak Institutional Capacity

64. Many tourism stakeholders from both the private and public sectors are active only intermittently: public-private dialogue is limited and institutional capacities are weak. The 2012 Tourism Act defined an institutional framework that requires clarifications, particularly the role of the tourism ministry, the ONTC, the business associations and the Regional Tourism Offices. It should be noted that communities that have a specific importance in the Comoros are not seen as tourism stakeholders.

Ineffective Tourism Monitoring and Information System

65. Comoros tourism statistical system is inadequate: there is no link between each island data collecting and processing systems. Existing figures are not reliable and data such as hotel capacity and tourism employment are not updated. Real contribution of tourism to the economy is also not clear.

No Leadership in the Private Sector

66. There are few tourism professionals in Comoros and none of the existing hotels is seen as a flagship or a locomotive for the destination. The sector needs to groom new actors, both domestic and foreign, through investment promotion and an appropriate private sector support program. This program will need to tackle various issues including access to finance, capacity building and partnership facilitation between foreign operators and investors and national stakeholders.

67. An integrated value chain analysis needs to be conducted to strengthen linkages between tourism and other sectors, generate greater economic impact, and more importantly create more indirect jobs and related activities.

3.3 Product Development and Competitiveness

68. Some tourism activities are virtually absent in the Comoros: formal incoming agencies are very limited in number (less than 10) since the market largely consists of independent travellers, most travel

agencies are not IATA-authorized, handicraft centres are rare despite existing know-how and there are only two operational diving clubs. Existing products are expensive and service levels uneven.

PRINCIPAL CHALLENGES

Limited and Expensive Air Access

69. Despite the recent rehabilitation of Hahaya International Airport, Comoros still does not provide direct flights from European and regional markets. Connecting flights take longer and are more expensive than in competing destinations (Mayotte, Réunion, Madagascar, Zanzibar) due to lack of connectivity.

Ineffective Management of Natural and Cultural Resources

70. There is only one formal Protected Area in the Comoros which is the Moheli Marine Park at which the co-management with the communities has shown its limitations. The Global Environment Facility (GEF) in liaison with UNDP will support the creation of five additional Protected Areas but a sustainable management and financing system for protected areas and cultural heritage sites is still to be developed. However, development of these valuable tourism assets will allow the destination to stand out from its competitors. Tourism can be an important sustainable source of income for protected areas and cultural assets as long as appropriate adjustments are made in alignment with sustainable and responsible tourism standards.

Fragmented, Unequal and Expensive Tourism Products

71. Investment and operating costs are high due to weak basic infrastructure (access roads, water & power supply, effective waste management) even in urban areas. Rates are considered prohibitive for uneven service levels, rendering Comoros uncompetitive when compared with more developed destinations like the Seychelles or Zanzibar.

Lack of Qualified Tourism Labour

72. Despite high unemployment, formal tourism job creation is limited. The available workforce is also mostly unskilled and will require significant training investment to be compatible with the needs of the industry. The existing training institutions need significant support to develop appropriate curricula and programs to meet market needs.

3.4 Destination Marketing

73. The Comoros remains unknown to major international source markets. It can potentially attract niche markets looking for new destinations.

PRINCIPAL CHALLENGES

Negative Image of the Destination

74. Comoros has a poor image due to past political instability and a lack of subsequent promotion efforts from relevant government authorities. However, the destination still enjoys a positive perception in the South African market thanks to earlier Galawa marketing efforts.

High dependence on French Source Market

75. The French market, including Mayotte and Reunion, represents the majority of tourists to the Comoros. A gradual market diversification to other European countries (Italy, Spain, Netherlands and United Kingdom) or other markets (South Africa) is key to reduce dependence of the Comorian destination on a single source market.

SECTION 4

Recommendations

76. Comoros is an extremely new and unknown destination even for seasoned travellers, and thus significant efforts will need to be undertaken for it to be developed as an attractive tourism destination. In line with the main issues outlined above, the following initiatives are recommended to further develop and support the tourism sector of Comoros.

TABLE 6: SHORT AND MEDIUM RECOMMENDATIONS

Policy Area	Short-Term	Medium-Term
Tourism Policy and Planning	<ol style="list-style-type: none"> 1. Definition of a tourism policy and development plan 2. Improved tourism investment climate 3. Define niche tourism product supply 	<ol style="list-style-type: none"> 1. Review the regulatory and institutional framework 2. Creation of tourism land reserves for tourism investment facilitation
Institutional Capacity Building	<ol style="list-style-type: none"> 1. Assistance and facilitation of public – private and inter-island dialogue 2. Implement tourism statistics system 3. Support private sector initiatives through business associations 	
Product Development and Competitiveness	<ol style="list-style-type: none"> 1. Conduct an air transport study 2. Facilitation of inter-island connectivity 3. Implementation of a tourism training and coaching program 	<ol style="list-style-type: none"> 1. Public Private Partnership for the effective management of protected areas and cultural heritage sites
Destination Marketing	<ol style="list-style-type: none"> 1. Assistance to the definition and implementation of the Destination Management Organizations (DMO) strategic plan 2. Target niche tourism markets (i.e. adventure, nature and culture based tourism, yachting and responsible tourism) and develop e-tourism promotion 	

4.1 Tourism Policy and Planning

SHORT-TERM

Definition of a Tourism Policy and Development Plan

77. This will provide a clear framework for existing and future players to restore confidence in and also create some visibility for the public sector in terms of its plan to increase economic and social impact of tourism. The process should begin as soon as possible and may require the establishment of a short-term program over three years to manage the immediate actions.

Improved Tourism Investment Climate

78. The procedures for the Investment Code approval or operating permits and licenses should be clarified and facilitated at national and regional level. Many investors face unclear, expensive and lengthy administrative procedures, resulting in a large informal sector which cannot work with international operators and promote the destination.

Define Niche Tourism Product Supply

79. At the moment, Comoros as a destination is not structured to work with traditional tourism intermediaries (such as travel agencies and tour operators) and demand segments (such as beach tourism) that are sensitive to security and safety standards and product competitiveness. Going forward, it will be more effective to target independent travellers and specialized tour operators in niche markets.

- Nature and Culture Based Tourism: visits to National Parks and Conservation Areas, turtle and bird watching, whale and dolphin watching, art and music festivals, visits to museums and historical and sacred sites, etc.
- Sport and Adventure Tourism: trekking (Karthala, Mohéli, Dzialandze Lake), diving and game fishing, mountain biking, etc.
- Yachting and Cruise Tourism: to target cruise ships coming from Mauritius (Costa Crociere) or South Africa (MSC, Princess, etc.). Important works will need to happen in the main berthing facilities on the three islands. Immigration and docking procedures need to be clarified in order to increase the number of cruise ships and yachts that can berth in Moroni, Fomboni and Nioumachoua, and Anjouan.
- Fair and Responsible Tourism: communities play an important role in the Comoros social structure. They are eager to take part to tourism development and already manage accommodation, promotion and site conservation activities but without the required capacities. They can be integrated in tourism differently through responsible tourism products.

MEDIUM-TERM

Review the Regulatory and Institutional Framework

80. Regulatory and institutional frameworks need to be developed as part of the Tourism Policy and Development Plan and need to minimally define roles between the various public, parastatal and private organizations so as to avoid misunderstandings between the central and regional authorities. This also applies to other departments critical to the development of the tourism sector such as Transport, Finance, Environment, Home Affairs, Culture and Education.

Creation of Tourism Land Reserves for Tourism Investment Facilitation

81. Land tenure remains a major obstacle for tourism development in the Comoros. The development and implementation of the Tourism Master Plan needs to be accompanied by identification of priority tourism sites and the creation of Tourism Land Reserves for investors to secure their investment projects.

4.2 Institutional Capacity Building

SHORT-TERM

Assistance and Facilitation of Public – Private and Inter Island Dialogue

82. For many years, the State has been the major player in tourism as a partner of international investors like Sun Resorts and Novotel. However consultation with private operators has not been effective, in particular in the areas of the development of similar quality tourism products or in the management of destination promotion. The system remains highly centralized: regional actors complain about the

lack of dissemination of information and transparency in decisions which impact the entire destination. A platform for regular consultation (at least once a year), before major decisions are made, needs to be set up.

Implement Tourism Statistics System

83. Given the limited number of tourists today and the need to have data for baseline studies, a tourism information system should be set up under the supervision of the DNTH. The DNTH needs to work closely with the departments in charge of immigration, BCC and Regional Directorates. A visitor survey can also be conducted to better understand the current market and tourist profile to guide development of future policies.

Support Private Sector Initiatives through Business Associations

84. The tourism industry needs to structure itself to be a reliable partner for the GUC, the communities and the technical and financial partners. Several associations have recently emerged representing specific sectors or geographic areas: their needs are to be analysed to enable them to achieve their goals to improve the global product quality and profitability.

4.3 Product Development and Competitiveness

SHORT-TERM

Conduct an Air Transport Study

85. The lack of more flights by major carriers from Europe could be attributed partly to technical reasons related to insufficient airport infrastructure, partly to commercial reasons as there is little accommodation capacity and demand, and partly to financial reasons as air transport taxes and costs are said to be high in the Comoros. The limited number of international tour operators working in the Comoros also deters airlines from establishing more frequencies or providing charter flights.

86. A comprehensive study on air transport in the Comoros should be conducted in conjunction with the Tourism Development Plan to reconcile the two closely related sectors of air transportation and tourism. This study needs to address the regulatory, technical, operational, financial and economic issues and explore possible partnerships to achieve short and long-term sustainability.

Facilitation of Inter-Island Connectivity

87. Incentives can be developed to facilitate transport between islands to increase tourist mobility and thus the overall attractiveness of Comoros. Recent private initiatives in maritime transport have stopped because of high transaction costs or low occupancy. Air connections have improved but also require support for operational management.

Implementation of a Tourism Training and Coaching Program

88. The Tourism Development Plan needs to include an analysis of the labor market to determine the number of existing jobs and to assess existing skills and needs. It will also make an inventory of existing tourism training institutions and programmes and define a support programme (training of trainers, review of existing curricula, etc.).

89. Meanwhile, in-situ training and coaching can be implemented in partnership with the regional private sector to encourage trainers to share their knowledge and expertise with existing and new staff, and support the implementation of basic procedure manuals for manager

MEDIUM-TERM

[Public Private Partnership for the Effective Management of Protected Areas and Cultural Heritage Sites](#)

90. The Tourism Master Plan will take into account the Management and Promotion Plans of protected areas and the cultural heritage sites on the basis of public-private partnerships between private operators, municipalities and the communities. Effective management of entrance fees, operations licensing or concessions can contribute to sustainable tourism development.

4.4 Destination Marketing

SHORT-TERM

[Assistance to the Definition and Implementation of the Destination Management Organizations \(DMO\) Strategic Plan](#)

91. The Comoros archipelago is a destination as well as a group of island destinations. The newly created ONTC and Regional Tourism Offices need to redefine their respective roles. They need to build capacity in the marketing plan implementation to reconcile economic objectives, business profitability and visitor satisfaction. Existing regional initiatives like the VIO and the Mozambique Channel initiatives could be considered by the DMO in the short and medium term strategic plans.

[Target Niche Tourism Markets \(i.e. adventure, nature and culture-based tourism, yachting and responsible tourism\) and Develop E-tourism Promotion](#)

92. Efforts can be made to target niche markets in search of new and unexplored destinations and who are less deterred by the inconvenience of costly and difficult air access. It is proposed that once the Tourism Development Plan has been finalized, a three-year campaign could be set up to create a positive image of tourism of Comoros in particular via an E-tourism promotion program.

SECTION 5

Conclusion

93. This study has reviewed the tourism sector of the Union of Comoros. While Comoros is still in the exploration stage of tourism development, it does have exceptional natural resources and an appealing culture. Solutions for Comoros will require a social, environmental and culturally sustainable approach as their fundamental guiding principle, in which tourism could become an instrument for economic growth.

94. Tourism development is a must for Comoros' economic growth and poverty reduction. The main question to be addressed is how to create a sustainable destination and put the country on the tourism demand map. The growth patterns and examples of Seychelles, Maldives and Zanzibar show there are several ways to achieve this goal. But in all cases there is a need to reach a critical number of accommodations to interest tour operators and airlines. There needs to be an initial stimulus in order for tourism development to grow triggered by a strong signal given to investors to enable confidence. Comoros is attractive enough to draw the interest of major players from the Gulf countries.

95. Comoros will need a revised tourism development plan and policy that address the specific current opportunities and constraints of each destination. In addition, it will need the institutional strength to execute the strategy and ensure proper coordination of donor tourism support projects: AFD, GEF / UNDP, Enhanced Integrated Framework, Global Partnership for Sustainable Tourism. Comoros has also seen many national and foreign investors show interest in tourism development, but for a variety of reasons they leave the country without seeing through their plans.

96. Regional tourism cooperation could provide a significant opportunity for the islands in the Indian Ocean including Comoros. Recent initiatives such as regional marketing and visa cooperation by COMESA are promising. Other examples of cooperation in the region are initiatives for training, standards and air transport. The *Vanilla Islands* and *Mozambique Channel* initiatives are evolving as vehicles to create more visibility for the region as a tourism destination and develop joint marketing. The goal for Comoros and others in the region is to learn from each other and leverage lessons in order to achieve overall success in the region.

Annexes

Annex 1: Summary of Issues and Recommendations

Constraints	Key Issues	Proposed Recommendations
<i>Tourism Policy and Development Plan</i>	<ol style="list-style-type: none"> 1. Lack of vision and visibility for tourism development 2. Unclear investment climate 3. Poor public infrastructures and services 	<ol style="list-style-type: none"> 1. Definition of a clear tourism policy and development plan 2. Improve tourism investment climate 3. Define niche tourism products 4. Review the regulatory and institutional framework 5. Create Tourism Land Reserves to promote and facilitate investment
<i>Institutional Capacity Building</i>	<ol style="list-style-type: none"> 4. Weak institutional capacity in both public and private sectors 5. Ineffective tourism monitoring and information system 6. No leadership in the private sector 	<ol style="list-style-type: none"> 6. Assistance and facilitation of Public Private and Inter Island dialogue 7. Implement a tourism statistics system and conduct a visitor survey 8. Support private sector through business associations
<i>Product Development and Competitiveness</i>	<ol style="list-style-type: none"> 7. Limited and expensive air access 8. Ineffective management of natural and cultural resources 9. Fragmented, unequal and expensive tourism products 10. Lack of qualified tourism labour 	<ol style="list-style-type: none"> 9. Conduct an air transport study 10. Facilitation of Inter Island connectivity 11. Implementation of a tourism training and coaching programme 12. Public Private Partnership for effective management of Protected Areas and cultural heritage
<i>Destination Marketing</i>	<ol style="list-style-type: none"> 11. Negative image of the destination 12. High dependence on French source market 	<ol style="list-style-type: none"> 13. Assistance to the definition and implementation of DMO strategic plan 14. Target niche markets and promote E-tourism activities

Annex 2: List of Tourism Stakeholders in Comoros

Name	Title	Organization
<i>Public Sector</i>		
Ms. Sitti Attoumani	National Director of Tourism and Hospitality	Minister of Telecommunications, Transport and Tourism
M. Nidhoimi Halidi	General Secretary	Vice President in charge of the Ministry of Finance, and Commerce
Ms. Baraka Mmadi Moundji	Regional Tourism Director	Commissariat au Tourisme (Ngazidja)
M. Kassim Badrouline	Regional Tourism Director	Commissariat au Tourisme (Anjouan)
M. Madi Toiouilou	Regional Tourism Director	Commissariat au Tourisme (Mwali)
<i>Parastatals</i>		
Ms. Hissane Guy	President	National Comoros Tourism Office
M. Mbapandza Mohamed	Coordinator Private Sector	Commissariat Général au Plan
M. Daoud Saidali Tohir	CEO	Investment Promotion National Agency
M. Fakriddine Abdoulhalik	Cooperation and Training Officer	UCCIA
M. Anfane Saïd Mchangana	CEO	Port Authority
Ms. Zalhata Dahalani M. Saïd Abdou Salime	Expert in Trade Policy National Coordinator	Enhanced Integrated Framework
Mr. Attoumani Mohamed	CEO	Civil Aviation Authority (ANACM)
<i>Private Sector</i>		
Ms. Nafissa Mlanao	President	Association Comorienne du Tourisme (ACT)
M. Omar Toiouil	President	Association des Guides Touristiques des Comores (AGTC)
M. Mohamed Chamsiddine	Member	Association des Professionnels du Tourisme d'Anjouan (APTA)
M. Ayad Bourhane	Chief Executive Officer	AB Aviation
M. Wissam Saoud	General Manager	Cristal Itsandra Beach Hotel (Ngazidja)
M. Cyriaque Jean Baptiste	General Manager	Al Amal Hotel (Anjouan)
M. Richard Krebs	Hotel Manager	Laka Lodge (Moheli)
<i>Donors and Other Organizations</i>		
M. Douglas Coutts	United Nations Representative Resident	UNDP
M. Riad Meddeb	Economist	UNDP / Enhanced Integrated Framework
Ms. Anna Costantini	Officer	European Union
Ms. Dominique Roby	Consultant	GEF/UNDP
M. Frédéric Brignot	Cooperation Officer	France Embassy
M. Jean-François Vavasseur	Director	AFD
M. Bicarima Ali	Project Manager	AFD
M. Said Ali Antoissi	Consultant	The World Bank
M. Hugh Doulton	National Coordinator	ECDD project (Anjouan)
M. Ahmed Ouledi	President	Ulanga NGO
M. Azali Said Ahmed	Vice President	Comoros Vision Association

Annex 3: Overview of Main Hotels and Guest Houses in Comoros

Hotel Name & Location	Opening	Rooms	Comments
<i>Grande Comore (Ngazidja)</i>			
Retaj Moroni Resort (Moroni)	1984	58	Originally built by Accor for a Novotel. Currently under a lease agreement with Doha based Retaj Group. Hotel in poor condition. No alcohol served.
Les Arcades (Moroni)	1998	12	Privately owned and operated. Recently taken over by Reunion based investors. In poor condition.
Cristal Itsandra Beach Hotel (Itsandra – Moroni)	1984	60	Government-owned and formerly operated by Sun International, now operated by Abu Dhabi based Cristal Hospitality Group. Considered as the benchmark hotel in the Comoros with its private beach and casino.
Karthala International Hotel (Vouni)	2010	28	Badly damaged by recent rains and under rehabilitation. KMF 300 million loan with Exim Bank which it is challenged to pay.
Villa Jessica (Moroni)	n.a.	06	Privately owned and operated by Comoros born French. Successful guest house. No restaurant.
Le Jardin de la Paix (Moroni)	n.a.	15	Privately owned and operated by a national operator (also President of Women Entrepreneur Association)
<i>Moheli (Mwali)</i>			
Relais de Singani (Fomboni)	1984	20	Government owned until 1997 and since then privately owned and operated.
Laka Lodge (Nioumachoua)	1997	14	Privately owned and operated. Benchmark hotel in Mohéli that is located in the Moheli Marine Park.
Les Abou (Bandar Salam)	n.a.	15	Privately owned and operated. Main business hotel in Moheli.
Choini Bungalows (Nioumachoua)	2011	03	Privately owned and operated. Located in the Mohéli Marine Park. Partnership with a diving club (Chisiwa Diving).
La Grande Plaine (Djoiézi)	n.a.	08	Privately owned and operated. Former villa that became a guest house.
<i>Anjouan (Ndzuan)</i>			
Al Amal (Mutsamudu)	1984	22	State owned property. Under Accor management (Novotel) from 1983 to 1994. 50 year lease granted to Sodeco in 2004.
Mapongée Palace Hotel (Mutsamudu)	2012	18	Privately owned and operated by a Mutsamudu businessman. Initially real estate project (apartments). No alcohol served.
Johanna Livingstone Hotel (Mutsamudu)	n.a.	40	Privately owned and operated (same family as Mapongée Palace owner). On-going expansion. No alcohol served.
Le Papillon (Mutsamudu)	n.a.	10	Privately owned and operated by a French Comorian from the diaspora. On-going expansion.
Loulou Hôtel (Domoni)	n.a.	16	Privately owned and operated. Located in the historical capital city of Anjouan.
Moya Beach (Moya)	1995	09	Privately owned and operated. Successful small guest house with direct sea view and closed by the Moya Beach.

Source: DNTH (2013)

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