CENTRO DE ESTUDOS SOBRE ÁFRICA E DESENVOLVIMENTO
ISEG - Universidade de Lisboa

Working Paper

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TOURISM MASTER PLAN FOR THE ISLAND OF SANTIAGO, CAPE VERDE: 2020–2030 – Part 1

Eduardo MORAES SARMENTO et al.

CSG INVESTIGAÇÃO EM CIÊNCIAS SOCIAIS & GESTÃO RESEARCH IN SOCIAL SCIENCES & MANAGEMENT

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ABSTRACT

Cape Verde, a small insular development economy (SIDS), has been confronted and faces various economic, social and environmental constraints throughout its history that have been conditioning its growth strategy.

In recent years, tourism has been growing and consolidating an important contribution to economic development, which is observable in the evolution of the number of nights spent in the country, revenue, number of guests, employment generation, and incentive to export among others. The gross added value of tourism currently has a weight that is already more than 20% of its GDP (excluding the COVID-19 pandemic period).

Aware of this potential, the Government created conditions for a greater use of its effects as a mobilizing factor in the economy. Accordingly, various official supporting documents and strategic orientations have been approved, such as the Strategic Plan for Sustainable Development and the Main Options of the Strategic Plan for Sustainable Development for the Tourism Activity.

It was also decided that each island or region should develop its own strategic tourism plan (Masterplan). This paper integrates the main strategic reflections regarding the Tourism Master Plan for the Island of Santiago.

Revenue from tourism on the Island of Santiago, where the capital of Cape Verde is located, has been much less than the values of the main islands with a high volume of tourists – Sal and Boa Vista. However, the potential of Santiago is high, and therefore it is necessary to adopt the correct measures required to transform this potential into reality.

Therefore, this paper presents a short, medium and long-term vision, with a proposal for strategic objectives that will constitute the anchor on which all operational strategic and objectives that will translate into specific lines of action will be based.

In summary, this document proposes a strategy based on a diversified and differentiated touristic offer from the other islands of the country, which maximises its potential, counteracting regional asymmetries and preserving the historical and intangible heritage, as well as the natural resources, with the aim for the whole population to benefit from the resultant economic development, especially the most disadvantaged.

Keywords Cape Verde, Economic diversification, Tourism Master Plan.

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Introduction

The Government of the Republic of Cape Verde received a grant from the International Development Association (IDA) of the World Bank to prepare Tourism Development Projects, with the aim to create the necessary conditions to increase investment and the diversification of products in the country's tourism area.

According to the Government, tourism is seen as one of the strategic pillars of Cape Verde's economy. The Government Programme of the 9th Legislature established several goals and priorities for the sector, among which the following stand out (GCV, 2018):

• Attain 1.0 million foreign tourists per year by 2021, and 3.0 million per year in 2030 (Strategic Plan for Sustainable Development);

• Increase the revenue per tourist to above the average of its main competitors;

• Be ranked among the Top 30 most competitive countries in the world in terms of tourism by 2021 (today the country is the 86th) and among the Top 5 in Africa;

• Promote the positive externalities of tourism through the associated tourism network which covers Agriculture, Fisheries, Culture, and Sport;

• Adopt a tourism extension strategy, paying special attention to the development of new segments, such as Mountain/Ecological Tourism, Cruises and Events/Business;

• Reinforce the link between Tourism and the Environment, with a view to creating and promoting sustainability in the sector.

As a medium-income, island state, Cape Verde’s faces a huge challenge in being able to build an economy with a high level of sustainable and inclusive growth, if it is to overcome the key constraints to its development, namely: the country’s structural vulnerabilities, external dependence, high unemployment and poverty, uneven income distribution, and decreased opportunities for emigration, and potentially, declining remittances (GCV, 2018).

Cape Verde is confronted with several major vulnerabilities, examples being: a low level of agricultural production, with the country importing more than 80% of its food requirements; a limited capacity to export; environment and climate change; geographic dispersion (the insular and fragmented nature of the country, which is spread across 10 islands, with the steep and rugged topography on most of the islands having a significant impact on the costs of providing basic infrastructures, public services, and essential goods); safety, due to its extensive coastline; its exclusive economic zone; and it's energy needs, whereby Cape Verde's dependence on imported energy is approximately 75% (GCV, 2018).

It can thus be stated that Cape Verde, with its small insular economy in terms of development, has faced economic, social, and environmental constraints throughout its history that conditioned its growth strategy.

In recent years, tourism has been growing and has become consolidated as an important contribution to economic development, which is observable in the evolution of the number of nights spent, hotel revenue, number of guests, employment generation, and incentive to export. The gross added value of tourism currently has a weight which already surpasses 20% of GDP.

Aware of this potential, the Government has been creating conditions for a greater use of its support and assets as a mobilizing factor in the economy. Accordingly, the following official supporting documents and strategic orientations have been approved: the Strategic Plan for Sustainable Development, and the Main Options of the Strategic Plan for Sustainable Development for Tourism.

It was also deliberated that each island or region should develop its own strategic tourism plan (Master plan). This document constitutes the executive presentation of the Tourism Master Plan for the Island of Santiago.

Despite notable results at the national level, tourism on the Island of Santiago, where the capital of Cape Verde is located, is far from the values of the main islands with high volume of tourists – Sal and Boa Vista. However, the potential of Santiago is high, so it is necessary to take the measures that will transform this potential in reality.

Therefore, this paper presents a short, medium and long-term vision, together with the proposal of strategic objectives that will constitute the anchor on which all operational strategic and objectives will translate into specific lines of action.

In summary, this paper proposes a strategy based on a diversified and differentiated touristic offer from the other islands of the country, which maximises its potential, counteracting regional asymmetries and preserving the historical and intangible heritage, as well as the natural resources, with the aim for the whole population to benefit from the resultant economic development, especially the most disadvantaged.

1. RESEARCH FRAMEWORK

The selection of an appropriate research approach is critical to successfully meeting the research objectives. During our visits to various provinces and meetings with the population and experts, this study mostly employed a qualitative approach to analyse the tourism potential and limitations in Cape Verde as a future strategic activity.

According to Merriam (2009), qualitative research allows researchers to gain insight into how people make sense of their own experiences and the world around them, as well as the significance they place on those experiences for themselves and others. Thus, this qualitative approach will shape the researchers' perceptions of the tourist challenges and provide extra guidelines for conducting the study.

The research employed the case study design for the study. Data were collected through carrying out various semi-structured interviews, site visits, and information from the Government's platforms, as well as the collection of primary data to capture consumers' experiences in detail.

During our visits to different municipalities, various semi-structured interviews were conducted with companies, employees, directors, ministers, organizations, and even the public. A regression analysis after Liang (2021) was also carried out.

The approach to the elaboration of Tourism Master Plan for the Island of Santiago was structured in three phases, which will be explained in the Working Paper n. 193/2023 (Part 2).

This paper attempts to list some of the major aspects of tourism in Cape Verde as well as its potential and challenges, in order to obtain a solid theoretical and practical basis for the improvement of the Tourism Master Plan for the island of Santiago.

2. DIAGNOSIS OF TOURISM IN CAPE VERDE

Cape Verde is a country that stands out in world tourism due to its excellent beaches, transparent sea, mild climate, the possibility to practice water sports, beautiful natural landscapes, and ecotourism, among other features that attracted more than 760,000 tourists in 2018 (INE, 2018). The tourism sector has been boosted in the country by both public policies aimed at strengthening this activity in a sustainable way and by creating tax and customs incentives to encourage new investments.

Consequently, this activity has been registering growth rates greater than 8% per year (prior to the pandemic crisis), with an increasing trend towards an average annual rate of more than 10% during the last two years, which is more than double the world rate (Republic of Cape Verde, 2019).

The main tourist destinations in Cape Verde are the islands of Sal and Boa Vista, which receive 76.7% of the total foreign tourists visiting the country. These islands offer middle to upper class hotels and resort facilities, which are of the “all inclusive” type. A limited number of tourists visit the other seven islands. With the exception of the islands of Santiago, Sal, and Boa Vista, the others have yet to develop many hotels, tourist facilities, or transport infrastructure, owing to the lack of public and private investments for the development of the tourism sector. In addition, the other islands are unique and different as a tourist destination, being more related to nature and cultural tourism.

2.1 SOCIAL AND ECONOMIC DIAGNOSIS

Cape Verde had a population of approximately 544,000 people in 2018 (INE, 2010), spread over nine islands. About 85% of the population is concentrated on four islands: Santiago (56.2%), São Vicente (15.3%), Santo Antão (7.1%), and Sal (7%). The island of Brava has only 1% of the country's population (INE, 2010).

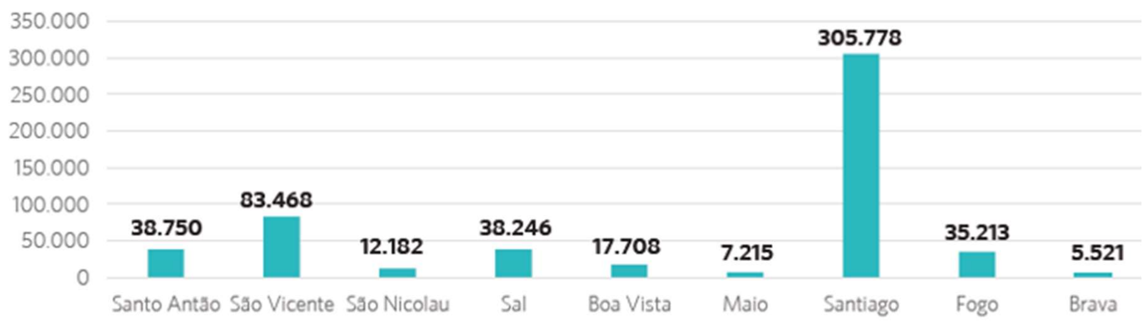

Figure 1: Demographic projection of the population by county in 2018. Source: INE (2010).

High emigration associated with a rapid drop in the birth rate led Cape Verde to experience a faster demographic transition than the rest of the African continent. It is estimated that the emigrant population is between 750,000 and 1,000,000 people, with many leaving before 1975. Since then, about 20% of the population has emigrated, mainly to Portugal, France, and the United States (WB, 2018). This population is very important for the development of Cape Verde, due to the financial resources injected into the local economy via remittances and foreign investment. According to the World Bank (2018), about 17% of small tourist businesses belong to former emigrants.

In terms of urbanization, about 66% of the population lives in urban areas (World Bank, 2018), placing Cape Verde as the second most urbanized country in Africa. Urbanization has been fuelled by frequent droughts and job creation in tourism-related activities in urban centres.

Cape Verde's economy has been progressively more dependent on the service sector, with the tourism industry representing approximately 70% of economic activities, and 65% of the workforce (World Bank, 2018).

Commerce, hotels, and restaurants are responsible for 23% of jobs, followed by public administration and public services (19%).

In terms of Gross Domestic Product, the islands with the greatest weight in the economic structure of the country in 2016 were Santiago, São Vicente, and Sal, with 52.1%, 14.8%, and 14.7%, respectively. On the other hand, the islands with the lowest contribution is Brava, with only 0.7%, which represents 1,165 million escudos (INE, 2018).

In terms of GDP per capita in 2016, the islands with the highest weight were the islands of Sal and Boa Vista, while the islands of Fogo, Maio and Brava recorded the lowest GDP per capita in Cape Verde (INE, 2018).

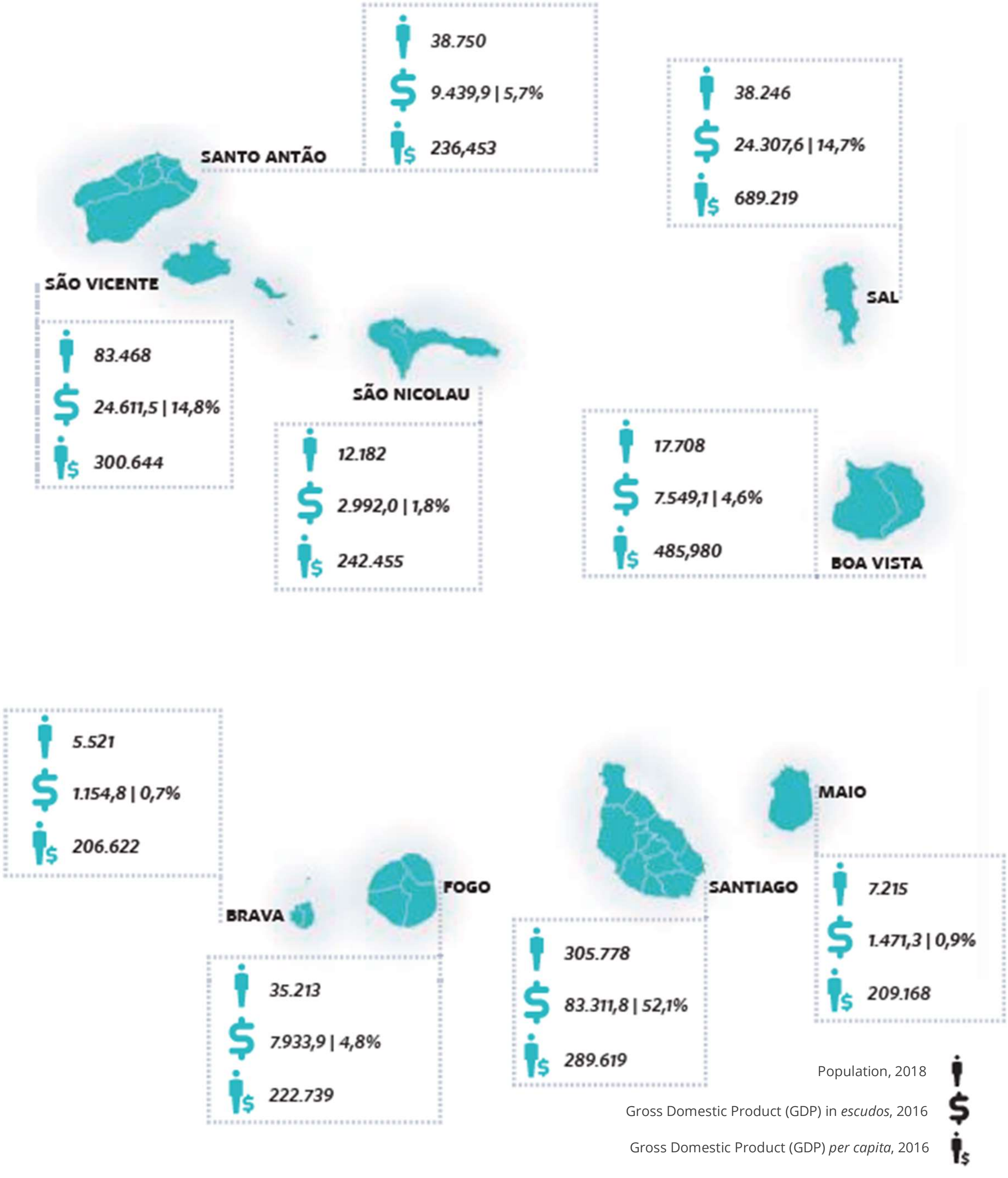

Figure 2: Population and GDP (2018). Source: INE (2018).

2.2 CHARACTERISATION OF THE ISLANDS

The islands of Cape Verde have different characteristics in terms of tourism and offer several possibilities for tourist activities, which are systematized in the following table.

	Beach	Aquatic sports	Business	Culture	Nature	Cruise	Residential	Health	Golf & Sports
Santo Antão	x	x		x	x			x	
São Vicente	x	x	x	x		x	x		x
São Nicolau		x		x	x			x	
Sal	x	x	x				x	x	x
Boa Vista	x	x					x	x	X
Maio	x	x				x	x	x	x
Santiago	x	x	x	x	x	x	x		
Fogo	x	x		x	x		x	x	
Brava		x		x	x			x	

Table 1: Tourism characterisation of the islands. Source: CVTI (2018)

2.3 ACCESSIBILITY AND INTER-ISLAND CONNECTIVITY

Being an archipelagic state, one of the main challenges for Cape Verde is access between the islands. Cape Verde has seven airports, four of which are international and are located at Praia (Santiago Island), Sal Rei (Boa Vista island), Espargos (Sal island), and Mindelo. Nine airlines currently fly to the country: Tui Fly, Royal Air Maroc, Binter Canarias, TAP Air Portugal, Neos, Luxair, TAAG Angola Airlines, and ASL Airlines France, in addition to TACV, which is from Cape Verde.

Inter-island connections can be made either by air or by sea. Santiago, the capital of the country, is the island that is most connected to the others. It is also possible to access the other islands in Cape Verde by the ferry service between São Vicente, São Nicolau, Boa Vista, and Santiago.

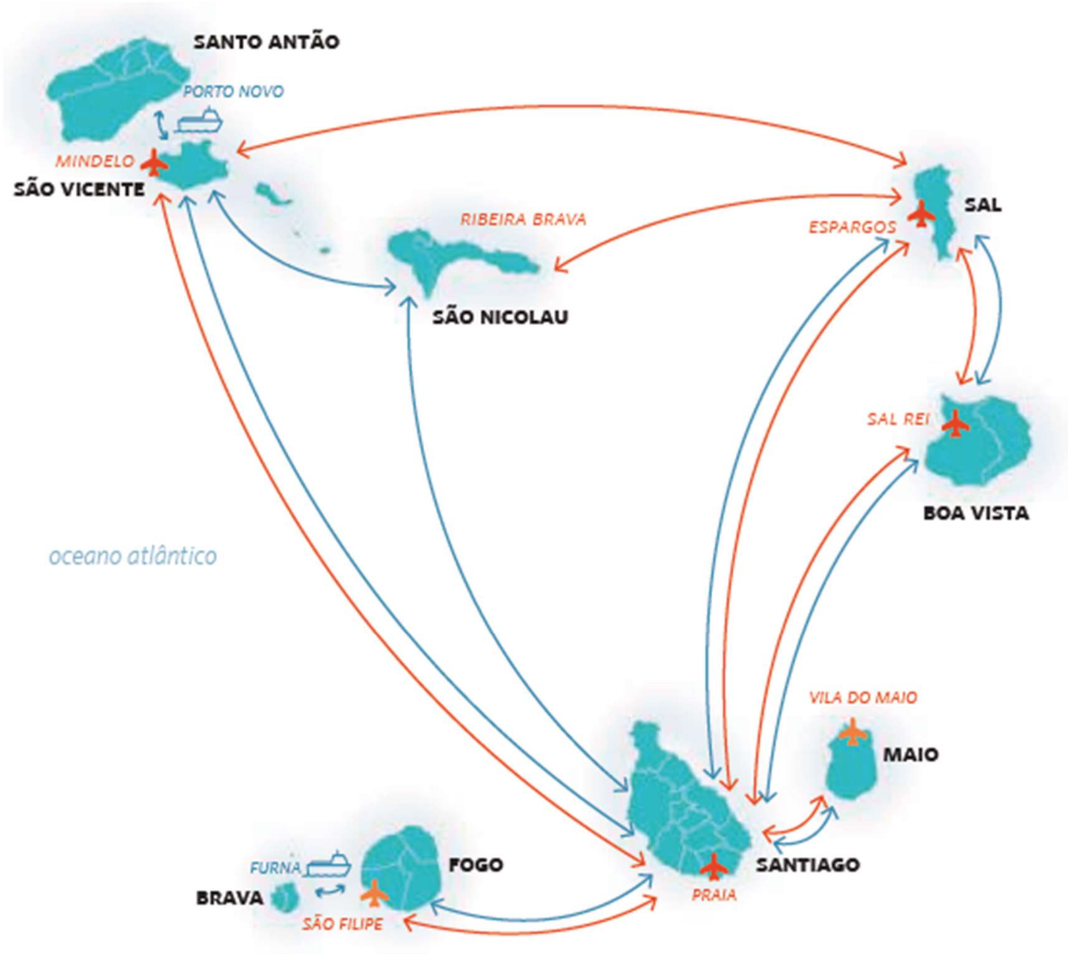

Figure 3: Inter-island connections. Source: INE (2010).

2.4 TOURISM PROFILE

Between 2009 and 2018, Cape Verde experienced a permanently increasing number of tourist arrivals to Cape Verde, which was reflected in an average annual growth rate of 9.9%. 765,696 tourists arrived in Cape Verde in 2018, representing a growth rate of 6.8% compared to the previous year. Of these visitors, about 44% visited the country in the low season (November to May), and 55% in the high season (June to October) (INE, 2018a).

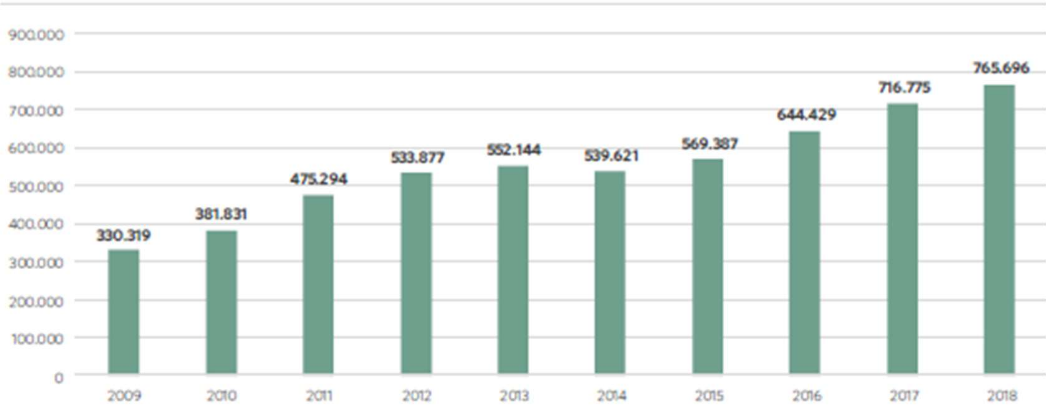

Figure 4: Arrivals of international tourists. Source: INE (2018a)

Among those tourists who visit Cape Verde, Europeans stand out, among which the British (United Kingdom) have the highest percentage, with 22.7%, followed by the Germans, French, Dutch and Portuguese, with 11.8%, 10.1%, 10%, and 9.3%, respectively. These nationalities together represented 489,134 international tourists (63.9% of the total number of tourists) (INE, 2018a). This behaviour is a direct result of the proximity of the country to Europe.

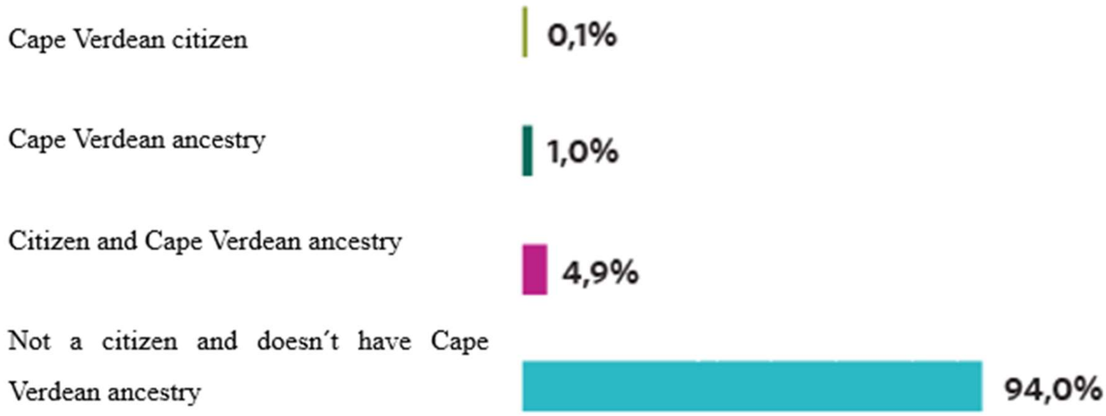

Figure 5: Distribution of tourists according to citizenship and/or ancestry. Source: INE (2018b).

Most tourists in Cape Verde travel on vacation, representing 94.2% of the total. At the same time, other tourists travel for professional and family/health reasons, with 2.7% and 1.1%, respectively (INE, 2018b).

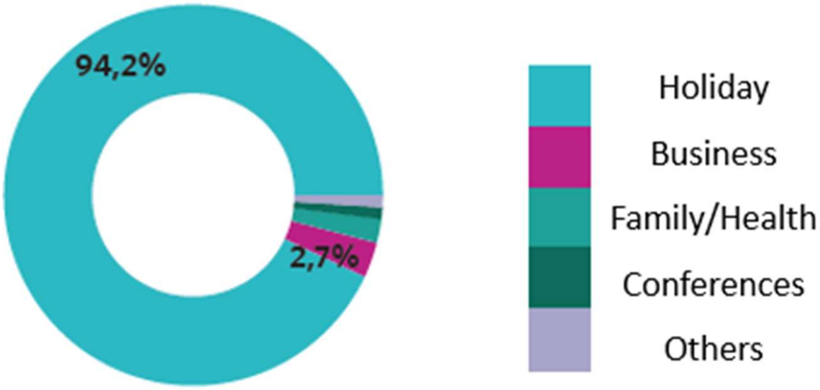

Figure 6: Distribution of tourists according to the reason for their trip (2018). Source: INE (2018b).

The distribution of the number of tourists per island in 2018 shows an overarching trend: the islands of Sal and Boa Vista receive the vast majority of tourists, together comprising 76.7% (549,825) of the total number of tourists in Cape Verde. Santiago Island is in third place, with 11.2% of the total. The remaining islands represent less than 10% of the total tourists received, with the island of Brava receiving the least, with just 1,125 tourists (INE, 2018a).

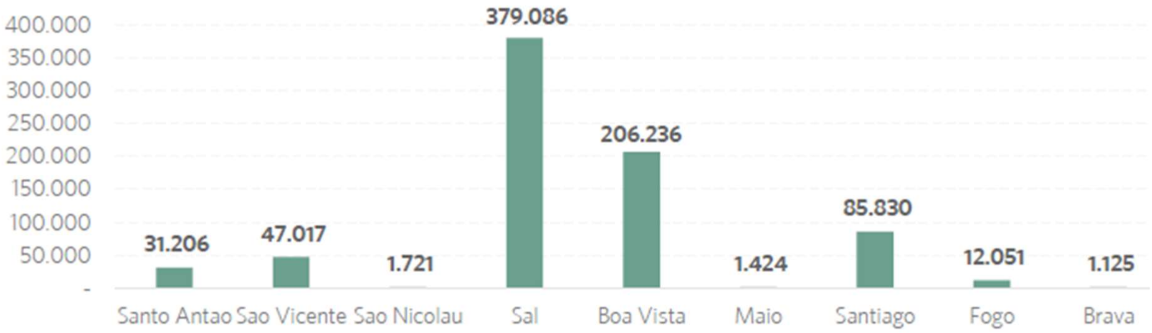

Figure 7: Distribution of the number of tourists per island (2018). Source: INE (2018a).

The average length of stay in the country was 6.4 days, with the islands with the longest stay being the islands of Boa Vista and Sal. However, most guests on these islands are part of the "all inclusive" segment. The islands of Santo Antão (2.9 days), São Vicente (2.8 days), Fogo (2.7 days), and Santiago (2.6 days) all register stays of less than 3 days (INE, 2018a).

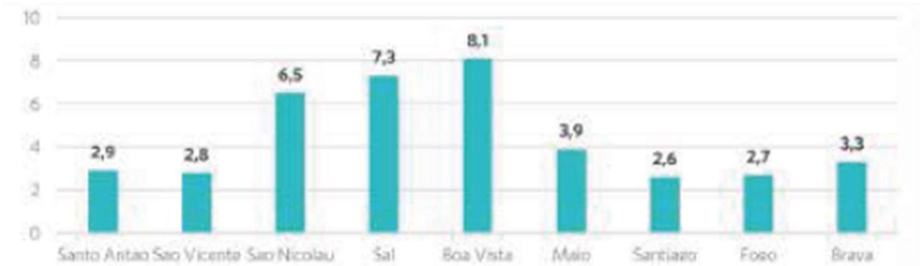

Figure 8: Average length of stay of tourists per island (2018). Source: INE (2018a).

Regarding hotel establishments, most rooms in Cape Verde are concentrated in the islands of Sal and Boa Vista, with 6,027 and 3,649, respectively. Together they concentrate 73.4% of the country's offer. The average annual occupancy rate in Cape Verde is 55%. However disparities exits, depending on the islands, as this average rate is much higher on the islands of Boa Vista (80%) and Sal (61%) (INE, 2018c).

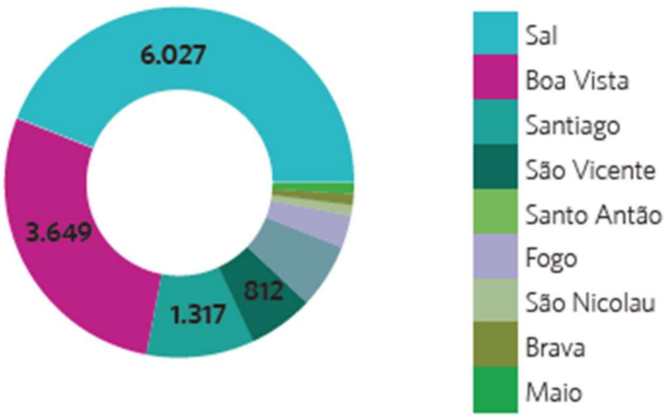

Figure 9: Number of rooms in Cape Verde per island (2018). Source: INE (2018c)

2.4 INBOUND TOURISM MARKETS

Europe is the main source of tourists, with 48% of the market, followed by Asia/Pacific, the Americas, and finally Africa and the Middle East. A growing global trend is the fact that 80% of tourists travel within their own region, reinforcing the importance of the domestic tourism trend.

In 2018, Europe was responsible for the arrival of 672.3 million tourists, Asia/Pacific for 358.7 million, the Americas for 235 million, and the rest for 135.1 million.

Regarding tourism spending in 2018, the countries that spent the most were China and the United States of America (UNWTO, 2019).

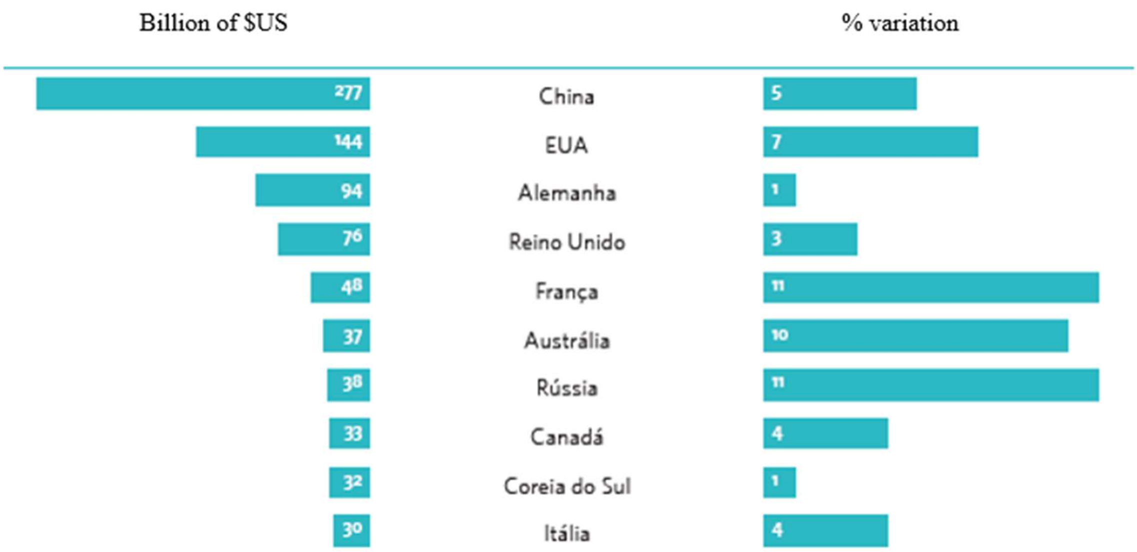

Figure 1~~10~~: Countries that spent the most money on tourism in 2018. Source: UNWTO (2019).

From among these countries, the three main outbound markets to Cape Verde are United Kingdom, Germany, and France.

3. TOURISM IN SANTIAGO

Over the past 18 years, tourism in Santiago has seen strong growth, with demand and accommodation tripling in volume.

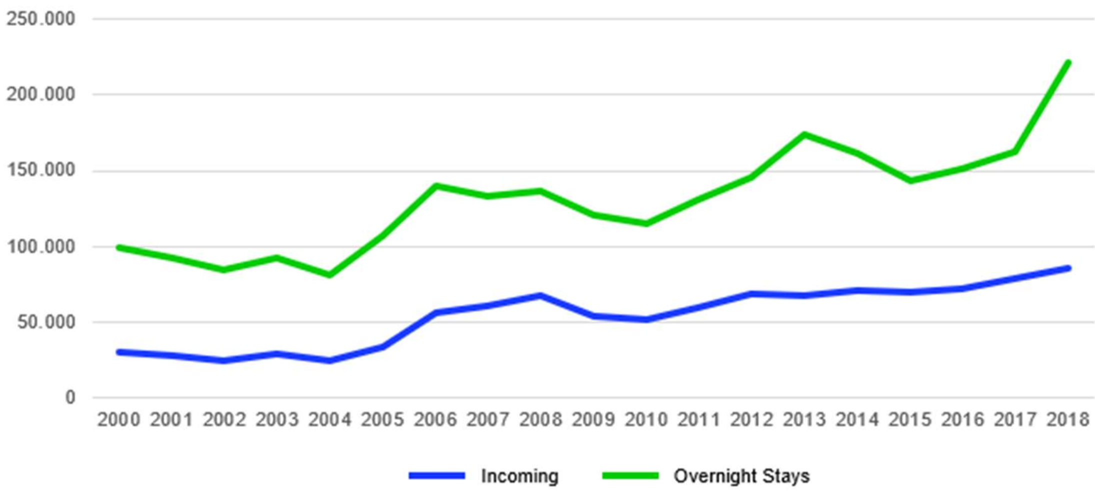

Figure 11: Growth of tourist demand in Santiago (2000-2018).

In 2018, there were 53 establishments for tourist accommodation on the island of Santiago, which was 2.4 times more than in 2000. The number of rooms have tripled, and the number of beds have multiplied by a factor of 2.6.

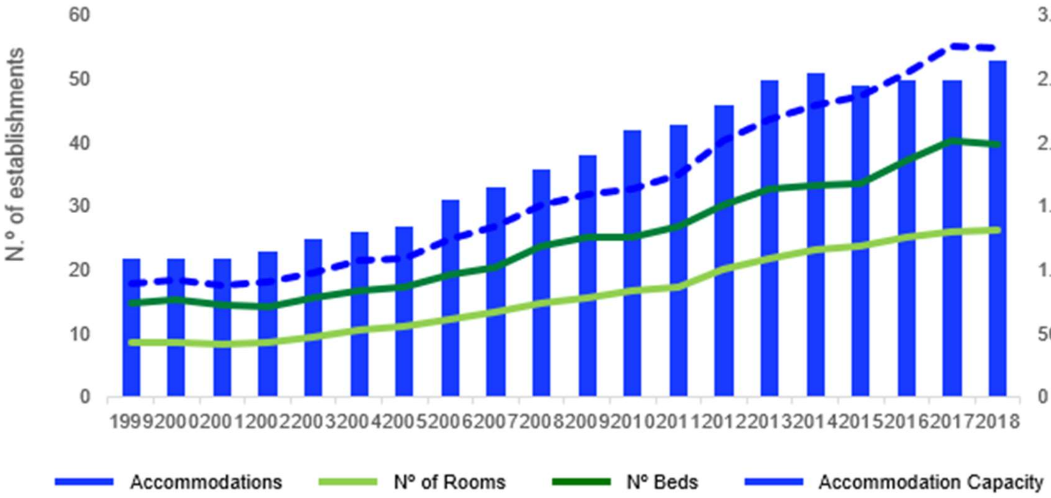

Figure 2~~12~~: Tourism offer growth in Santiago (1999-2018).

The forecast for the volume of tourists to Santiago by 2030 estimates that the total number of tourists will be 589,823 in 2030, compared to 78,845 registered in 2017, with a total Tourist Tax revenue of 7,566,384 euros (€).

3.1 PROJECT RATIONALE

The annual growth target for Cape Verde defined in the GOPEDS is 11.5% for the number of tourists, rooms, beds, and jobs.

Between 2000 and 2018, the number of hotel establishments in Santiago accompanied the general growth of establishments in the country, remaining close to 20% of the national total (INE, 2018).

Santiago represented about 10% of the total number of rooms in Cape Verde in 2018 (INE, 2018).

In recent years, the number of tourists in Santiago has grown, but at a lower rate than the islands dedicated to "mass tourism" (Sal and Boa Vista). It is therefore expected that Sal and Boa Vista will attain tourist saturation, which in turn will cause Santiago start to grow at a higher rate than the other islands.

Based on the characteristics and the reasons mentioned above, Santiago expects to concentrate 20% of the total tourists to Cape Verde by 2030, with the total number of tourists in 2030 forecast to be 590,000, corresponding to a total revenue of 7.6 million euros.

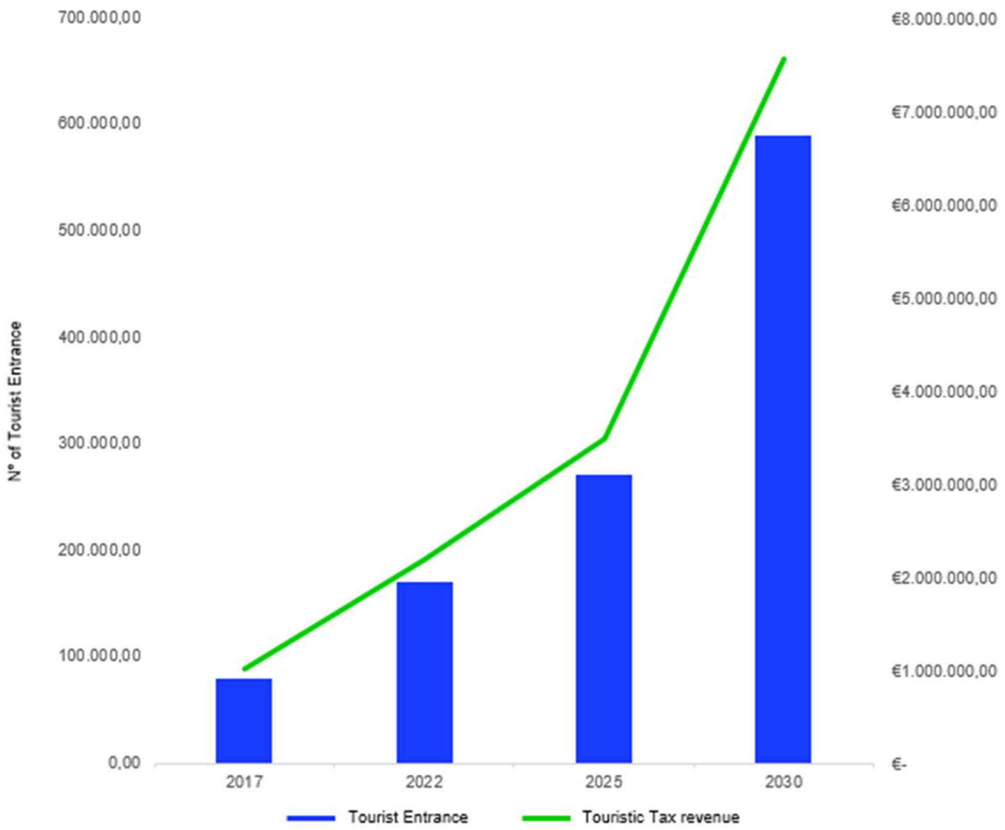

Figure ~~31~~3: Projection of tourism of Santiago until 2030.

Up until 2030, the island of Santiago will require an increase of 6,700 rooms and 3,100 hotel staff to respond to the projections of the number of incoming tourists (590,000 tourists), as well as a requirement for more rooms to accommodate them (8,000 rooms).

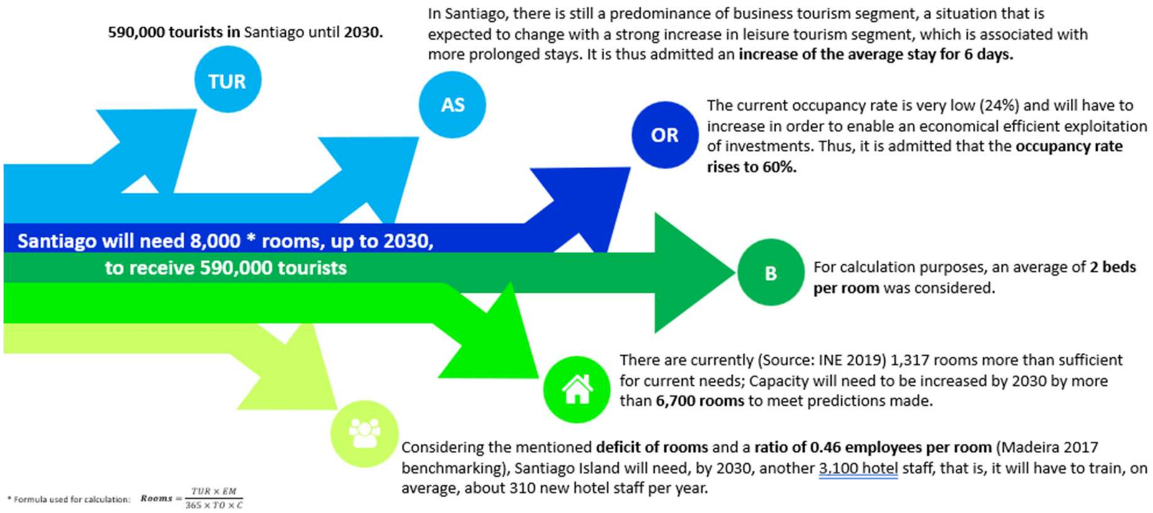

Figure 414: Model assumptions.

After the analysis of both the past evolution and the future projection of the demand and supply for the island of Santiago, a diagnosis of the current situation is summarised below of the 12 most important aspects for the development of tourism in Cape Verde.

Figure 5~~15~~: Main aspects for the development of tourism in Cape Verde.

1. Accessibility

Santiago suffers from some constraints regarding the provision of air and road transport (frequency, capacity…) and also the state of the road networks.

Main conclusions

There are internal connections to all islands with an airport, except Brava and Santo Antão. The cost of flights (e.g., from Portugal) has been high in the recent past.

Airport passenger terminal with theoretical capacity to move 1,100 passengers per hour is modern and efficient. However, the procedures of the border police lead to long waiting times.

In response to complaints by several tour operators, feasibility studies for the future expansion of the airport runway have been made, which will allow the movement of larger aircraft.

Santiago has about 417.4 km of national roads. The roads are in good condition and ensure convenient connections between the main urban centres. Since 2015, one new programme funded by the World Bank has been improving the state of rural roads.

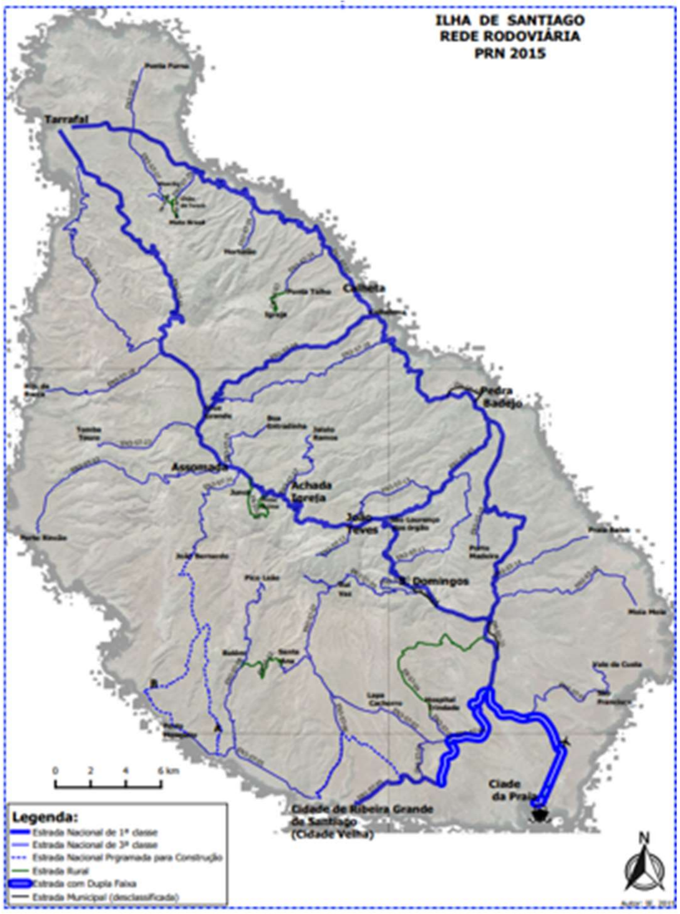

Image 1: Road network in Ilha de Santiago.

The dirt road secondary network is of very high interest for tourists, which provides routes through the interior of the island. These roads are in poor condition, and therefore roadworks will be very important for the development of rural tourism.

The fact that taxis are not equipped with meters creates a difficult situation for tourists, who never know what the tariff is, especially for the routes from the airport to the city.

2. Accommodation

In terms of accommodation, hotels are the main type of accommodation, with a strong concentration in the municipalities of Praia and Tarrafal.

Main conclusions

In 2018, there were 53 establishments for tourist accommodation, 2.4 times more than in the 2000. The number of rooms has tripled from 2000 to 2018 and the volume of beds has multiplied by a factor of 2.6.

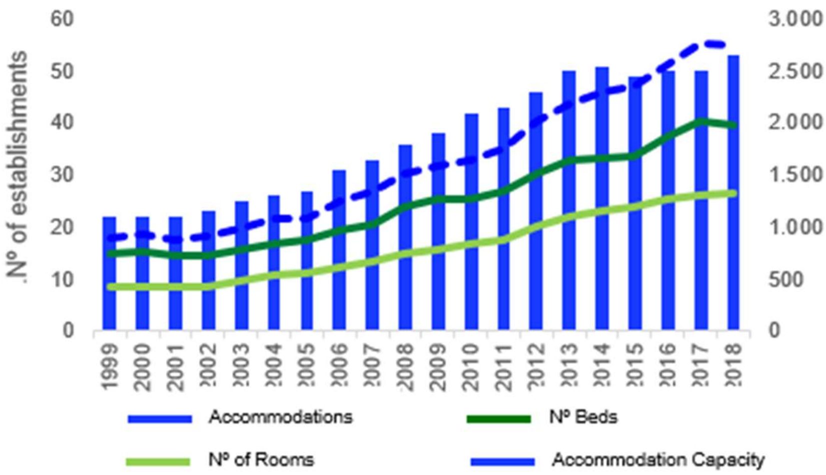

Figure 16: Tourism offer growth in Santiago.

Santiago island has 20% of the total hotel units in the country: 37% of the hotels, 11% of the pensions, 20% of the inns, and 10% of the guesthouses. At a room level, Santiago represents about 10% of the national total.

At the national level, the average number of rooms per hotel is 139. In Santiago the average number of rooms per hotel is 35.

The large international hotel chains have not yet entered Santiago, however there are some projects that have already been approved for the construction of hotels by these international chains.

On the island of Santiago, the most frequent units have between 6 and 60 employees and only 6% are of large size, namely: Pestana Trópico Hotel, Praia Mar Hotel and VIP Praia Hotel, Pérola Hotel and Santiago Hotel.

The "1 Family, 1 Tourist" programme is in a very embryonic stage, as it is still necessary for each of the municipalities to define which localities and families will receive support under this programme.

3. Electricity and Water

Electricity and water is substantially more expensive when compared to other countries.

- Of the 428 GWh of electricity produced in 2017, 87% was injected into the grid for consumption, with the remainder being used for energy production consumption and for desalination and the pumping of produced water.
- About 16% of the energy produced comes from renewable sources. Electra owns and operates a solar park on the island of Santiago and another on the island of Sal, with total available power of 5,700 kW, as well as a wind farm on the island of S. Vicente, with available power of 600 kW.
- Electricity costs in Cape Verde cost the triple of that of the United States and twice as much as Portugal. In terms of quality of service, in 2017 on average each client suffered 29 power cuts that totalled 50 hours without power.
- The high price of electricity and power cuts have led to the hotel units having to install their own means of production (generator sets).
- The distribution of water to consumers is mainly made through an old network, which generates much waste. When power cuts affect the water network, contaminants are infiltrated, which impairs the quality of the water consumed.
- There are five wastewater treatment plants in Santiago, with the largest having an installed capacity in WWTP of 8,120 m^3 per day.

4. Health Infrastructures

The health sector in Santiago is characterised by the concentration of hospitals, physicians and nurses in the city of Praia.

Main Conclusions

- About 61% of the hospital beds in Cape Verde are located in the Hospital Agostinho Neto, in the city of Praia.

Geographic area	Central Hospitals	Regional Hospitals	Health Centres	Total
Cape Verde	522	263	276	1061
Tarrafal	-	-	26	26
Santa Catarina	0	90	0	90
Santa Cruz	0	0	28	28
Praia	321	0	0	321
São Domingos	0	0	17	17
São Miguel	0	0	19	19
S. Salvador do Mundo	0	0	0	0
S. Lourenço dos Órgãos	0	0	0	0
Ribeira Grande Santiago	0	0	0	0

Table 2: Total hospital beds according to sanitary structures (2017). Source: INE (2019).

- 58% of doctors are concentrated in Santiago;
- Cape Verde has 7.68 doctors for every 10,000 inhabitants, with the equivalent value being 47.9 in Portugal, and 41.9 in Germany;
- The National Health Service has no quality or capacity to respond to a demand for tourists with the appropriate quality standards, in particular for the segment of senior tourism;
- The practice of medicine is liberalised and there are already four private clinics offering health care in Praia city, which are more or less equipped.

5. Demand

Cape Verde is a tourist destination that is mainly sought by European tourists as a holiday destination, where most of them intend to return.

Main Conclusions

- In 2017, the main tourism incoming markets for Cape Verde were the United Kingdom, Germany, France, Belgium and Holland, and Portugal.

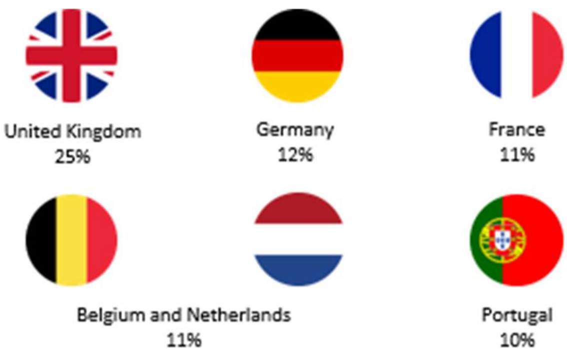

Figure 6~~17~~: Main issuing countries for Cape Verde. Source: INE (2019).

- 48% of tourists travelling to Cape Verde earn an annual income exceeding 36,000 euros;
- 91.5% of tourists come on vacation, 3.5% for professional reasons, and only 1.8% for conferences, fairs and similar (MI);
- The average age of tourists in 2017 was 45 years, with 54.3% being men. Tourists aged 44 years or less accounted for 51% of the total. Seniors (more than 64 years) represented 9%;

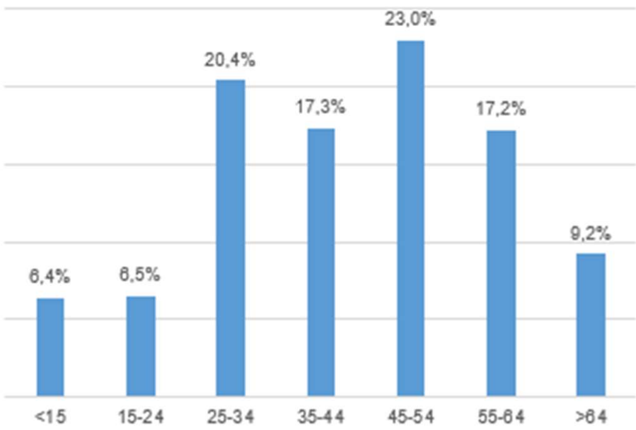

Figure 18: Average age of tourists in Cape Verde (2017). Source: INE (2019).

- In 2017, the average stay of tourists on the island of Santiago was 8 days, with those who do not travel on package holidays staying for longer (8.7 days).

6. Touristic Products (Supply)

The municipalities of Praia, Ribeira Grande, and Tarrafal are those that present more developed offers and tourist products and able to attract tourism nowadays.

Main Conclusions

Santiago presents several differentiators, such as: "history, culture and identity, and building heritage", "rural communities", and "nature". The leverage assets of Santiago are the amene climate, the sea, and its strategic location (proximity to Europe, America, and Africa).

Santiago holds gastronomic, oenological, and artistic events, as well as sporting and cultural qualifiers, with emerging assets being welfare, health, and MICE.

The existing tourist offer of note includes the following: MICE (the City of Praia is the capital of the country), the Old Town (World Heritage), natural parks (Malagueta, Rui Vaz, and Baia de Inferno), turtle hatching (Caretta Caretta, Morna, Tabanca, and Tarrafal beaches), nautical sports and cruises, musical events, pilgrimages, and local festivals.

The City of Praia stands out for the MI tourist product, which is complemented by beach tourism and cultural tourism, with a hotel network and more developed tourist infrastructures than most other municipalities.

The municipality of Ribeira Grande is known for the Old City, a UNESCO World Heritage Site, which is its main tourist product, with the Tarrafal beaching standing out for the tourist product of sun, sea, and nature.

The remaining municipalities need to develop their tourist infrastructures and increase their supply capacity, however there is a high potential for the development of the tourism product related to nature.

7. Marketing & Promotion (National and International)

With the increasing use of the Internet in the search for travel, Cape Verde is still not readily promoted as a destination on the institutional site of the country.

Main Conclusions

The country's website has an old-fashioned appearance and navigation is not user-friendly, with little appeal.

At the language level, the official website of Cape Verde is only available in Portuguese, English, and Italian.

The country's presence on the Facebook social network already appears to be more modern and dynamic, with a more appealing presentation, but without new publications since July 2017.

There are several Cape Verde promotion websites that stand out: https://www.turismo.cv/pt_PT/; http://www.caboverde.com/; http://www.caboverde-info.com/.

The presence in tourism fairs is carried out on an individual basis, and there is no central and integrated strategy between the municipalities of Santiago and between islands.

8. Human Resources

At the level of human resources, Cape Verde suffers from a lack of qualified human resources, with most of these being concentrated in the hospitality sector.

Main Conclusions

The School of Hospitality and Tourism of Cape Verde (EHTCV) has the capacity for 300 students and 450 vacancies for continuous training for staff who already possess professional experience.

The EHTCV also has the capacity to provide training services for other educational establishments and offers four technical courses – kitchen, restaurant and bar, hotel reception, and travel and tourism agencies technicians.

The projected growth of tourism on the island, as well as the number of approved projects serve to indicate that the number of trained personnel will not be enough for the needs of the tourism industry.

Hotel units are also currently encountering difficulty in recruiting sufficiently trained intermediate managers, as well as qualified personnel in the maintenance area. Furthermore, there are no trained or certified tour guides on the island of Santiago.

Hotels are the largest employers, responsible for 84% of employment in Cape Verde.

9. Hospitality industry

Although there is an increase in the number of restaurants and their quality of service, this sector is characterised by greater fragility in most municipalities in Santiago.

Main Conclusions

Hospitality is one of the most fragile sectors in several municipalities of Santiago, mainly in the interior regions of the island, i.e.: São Domingos, Santa Catarina, São Salvador do Mundo, Santa Cruz, and São Lourenço dos Órgãos.

Goods and Services	2011	2014	2015	2016	2017
Restaurants and Bars	3,6	3,9	3,9	3,9	4,0
Global Assessment	4,2	4,3	4,3	4,3	4,4

Figure 19: Evolution of the classification of goods and services made by tourists. Source: INE (2018b).

The classification given by tourists for catering services has evolved positively over the past few years, but is below the overall assessment of goods and services.

Although still incipient, the tertiary sector has verified a growth of services in the business of commerce and hospitality.

38 restaurants are identified and registered by the DGTT (2018) on the island of Santiago, the vast majority being located in the municipality of Praia.

Overall, there has still not been much investment in restaurants and bars hiring properly-trained staff. This reality is even more visible in the island of Santiago.

10. Basic Sanitation

Less than 33% of households are connected to the public sewage system and no central garbage recycling plant is yet in operation.

Main Conclusions

The proportion of households connected to the public sewage network is 26.3%, while 53.6% are connected to a septic tank.

There are five wastewater treatment plants in Santiago (WWTP).

Solid waste is deposited in open-air landfills.

In the city of Praia, a waste recycling plant is planned to start operating in the short term.

11. Security

The National Police has increasingly focused on prevention through CCTV surveillance and the presence of police in tourist areas.

Main Conclusions

The National Security Plan, which includes the Tourism Security Plan, is ongoing and is in line with Cape Verde's ambition to be one of the Top 30 tourism destinations worldwide.

Border security is a priority and it is the ambition of the National Police to introduce electronic passport control.

There is a need to strengthen security in the rural areas of Santiago Island, particularly in the Serra da Malagueta, Pico da Antónia, and Tarrafal.

The installation of CCTV cameras in Praia has had a positive impact on reducing crime.

12. Legislation and Governance

The GOPEDS define the guidelines, planning, and sustainable development of tourism in Cape Verde, with the Tourism Institute being responsible for its management.

Main Conclusions

Resolution No. 1/2019 of the Council of Ministers approved the Broad Options of the Strategic Plan for Sustainable Tourism Development 2018-2030, which is the basic document that guides the planning and sustainable development of tourism.

Decree-Law No. 37/2019, of the 25 July, created the Cape Verde Institute of Tourism, I.P, a fully public State entity, with administrative, financial, and patrimonial autonomy.

The National Tourism Council, which was created by Decree-Law No. 18/2018 of the 23 April, is a support body for the Government for the design, monitoring, and evaluation of all matters of tourism policy, with the power to issue recommendations and opinions, as well as to produce reports and studies.

There is no official regulation for tourism in Cape Verde.

There are numerous tourism support associations, institutions, and agencies in Cape Verde, including: Santiago Tourism Association, Cape Verdean Cruises Community, PROEMPRESA, Social Sustainability Fund for Tourism, PRÓ-CAPITAL, and PRÓ-GARANTE.

CONCLUSIONS

As has been verified above, Cape Verde has consistently experienced an increase in tourism over the years, making this activity extremely important as a way to broaden the country's limited internal resources and activities.

Within this context, the creation of a Master Plan for Tourism (Working Paper n. 193/2023 - Part 2) appears to be a vital instrument that can both serve as a guiding document of reference for tourism, as well as allow a better articulation of the vision and objectives for the development of this sector.

This paper represents an initial reflection/instrument to bring together all the entities involved in tourism. Although it presents numerous measures and proposals, this paper does not pretend to exhaustively cover all the planning actions that can and must be carried out to achieve an adequate development and management of tourism on the island with the aim to benefit the Government, entrepreneurs, and the local community alike.

As referred to by the national authorities, the Government's vision of the future for Cape Verde attempts to overcome the challenges and traditional vulnerabilities facing the country as a so-called Small Island Developing Country (SIDS) by adopting the concept of the dynamic insertion of Santiago island and thus Cape Verde itself in the global economy.

> As described above, Cape Verde is considered to be a Small Island Developing State (SIDS), due to its size, location, remoteness, and the fact that it faces additional costs resulting from its insularity and its archipelagic nature. Accordingly, it faces great difficulties in achieving economic success outside the framework of the global economy, even though significant economic opportunities are potentially available. The economic performance and success of the country depends, necessarily and fundamentally, on its insertion into the global economy and this can only be carried out through the implementation of a successful tourism strategy which results in attracting the inbound international tourism market.

This insertion into the global economy could be a significant opportunity, should it occur as a structured process which is guided by permanent, articulated, and strategic action at both the internal and external level, which in turn can condition or promote development (GCV, 2018).

Managing these external elements creates the best conditions to ensure the optimisation of the advantages of insertion into the global economy, taking into account, in particular, the economic and security contexts.

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