



Overview

- Part 1: Maldives, a country in the Indian Ocean
- Part 2: Central urban and touristic development zones
- Part 3: Resorts and tourism development in the periphery

The Maldives in the Indian Ocean

- Republic of Maldives
 - consists of 26 natural atolls
 - With 1196 low lying islands
 - Average 1.6 m above mean sea-level
 - 199 are inhabited
 - Some 100 islands are exclusive tourist resorts
 - Some 900 are uninhabited
 - stretched over 820 km north to south
 - 178 km east to west
- 20 administrative units 300 km² (less than Vienna) 329,000 Malde. Up to 200,000 more pe. Out of them 20,000 To. Some 180,000 Guest workers

Climate in Maldives

- Maldives have constant tropical climate
- 28°C mean temperature on land and in water
- 1900mm precipitation on 131 rainfall days

Month	J	F	M	A	M	J	J	A	S	O	N	D
Temp (°C)	30	31	31	32	31	31	31	30	30	30	30	30
Precip (mm)	26	26	27	27	28	28	28	25	25	25	25	25

Month	J	F	M	A	M	J	J	A	S	O	N	D
Temp (°C)	114	88	74	123	219	167	150	176	199	194	221	217

Temperatur in °C, Niederschlag in mm
Quelle: WMO

Population of Maldives

- 395,650 official estimate of 2010
 - Local information say actual population is considerably higher
 - Guest workers from Bangla Desh, Sri Lanka, India and other countries are only partially registered
 - State religion is (Sunna) Islam
 - The consumption of alcohol is prohibited
 - Wearing bikinis is prohibited outside resorts
 - Exercising Christian religions is forbidden
 - Reported as one of 10 countries of Christian prosecution

State Religion is Islam

- No other religion is allowed

Culture of Maldives

- Language
 - Maldivian Language is called "Dhivehi"
 - Written with Tana script
 - English is used in parallel for communication with non Maldivians
 - Along with Islamic culture, Arabic gains some influence
- Education
 - Currently university education is opening in Maldives
 - Maldives University, since 2011
 - Mandhu College, full university status pending

Resource Use

- Maldives have
 - Unique nature
 - Marine environment and seafood
 - Coconuts
- Maldives has no or few domestic resources
 - Agriculture
 - Water availability
 - Energy
- Most commodities are imported from outside
 - Expensive country



History of Maldives

- First settlements assumingly 5th century b.C.
 - Indian and Sri Lanka fishermen
 - Hinduism, Buddhism and Animism were predominant religions
- In 12th century, Maldives converted to Islam
- Foreign Occupation & Influence
 - Portugal occupied Maldives in 1558
 - Efforts to Christianize Maldives failed
 - Netherlands established protectorate in 17th century
 - Britain took over from NL in 1796
 - kept dominance until 1887
 - From 1887 only foreign affairs
 - Establishment of Republic and later on Sultanate in 1953
 - Commonwealth member until 1968 and again after 1985

Foreign countries with Influence

- Indian influence
 - For difficult medical treatments
- Sri Lanka influence
 - Until 2011 no universities were situated in Maldives
 - higher education was primarily consumed in Colombo
- Arabic influence
 - Get increasingly stronger due to Islamic schools
 - Spreading of Arabic as language of Quran
- Chinese influence
 - Main investments and many of skilled foreign labour force comes from China
 - Many developers for urban infrastructures come from China

Politics: October 2013 Warning to Avoid Maldives

- Similar to „Arab Spring“ in Eghypt we find political unrest in Maldives
 - For many decades the country was ruled autocratic
 - 2008 the first democratic president Nasheed was elected
 - 2012 Nasheed was forced to resign
- Sept. 7th, 2013, there were elections in Maldives
 - The current people in power did not allow the second round of votes on Sept. 28th, 2013
 - The high court annihilated the votes of elections on Oct. 19th, 2013
 - As a consequence there is political unrest
 - Many governments (like Austrian on the left) gave security warnings to Maldives
- Tourism is however the most important income
 - 75% of GDP due to tourism
 - 30% of GDP directly earned by tourism
 - Each political crises costs several % of GDP



Whom to believe?

Viel Sonne im Winterflugplan

Mehr als 25 Sonnenziele bei Austrian

Lieber Sonne als Schnee? Dann ab in den Flieger: Wir fliegen zwei Mal pro Woche non stop auf die Malediven und täglich nach Bangkok - und all das mit bestem Service in der neuen Business Class. Last Call für Europa-Fans: viel Sonne auch in Spanien, Italien, Griechenland und den Türkei!



Ab in die Sonne

- Austria
 - The national airline promotes sun and beach
 - new destination Male
 - The government issues warning

Sicherheit

Ständiges Sicherheitsrisiko

Das Hochgericht der Malediven hat am 7. Oktober d. J. das Ergebnis, das im September angefallene erste Round der Präsidentschaftswahlen annulliert und den Wahlgang auf den 18. Oktober 2013 verschoben werden. Seit dem Gerichtsbeschluss ist es ungewiss, ob die auf der Hauptinsel Male zu wahlenden Präsidenten gewählt werden.

Im Zusammenhang mit der allgemeinen innenpolitischen Krise in der sich das Land befindet, ist davon auszugehen, dass es insbesondere auf den größeren Inseln weiterhin noch wie Male, Atoll, Flugverkehr und Luftschiffverkehr zu Hindernissen, ungeklärten auch gesundheitlichen Zusammenhängen kommen wird. Diese können Neben sich durchstrahlung, hoch auf die Flugobjekte und die Fernverkehrsverbindungen, auf Grund von Unklarheiten und anderen Umständen, die sich im Laufe der Zeit ändern können.

Es wird empfohlen, sich vor größeren Menschenansammlungen fernzuhalten. Der Reiseverkehr wird generell, die Reiseveranstalter werden zu empfehlen und sich nach jeweiligen Reiseveranstalter über die aktuelle Sicherheitslage zu informieren.

Die Malediven sind ein wunderschönes Land, die maldivische Bevölkerung orientiert sich an der sich die kulturelle Erbschaften über einen kontinuierlichen Einfluss auf das öffentliche Leben der Inseln. Die kulturelle Erbschaften sind ein wichtiger Bestandteil der maldivischen Kultur. Die Staatsführung von Malediven fliegen von Russland für den persönlichen Konsum wird nicht haben. Die Staatsführung von Malediven fliegen von Russland für den persönlichen Konsum wird nicht haben.

November 2013 – State crisis

Malediven: Aus Gesetzesfluch wird Staatskrise
 Seitdem ist ein Land aus einem so richtigen Grund ins Chaos abgerutscht. Nach zwei verheerenden und einem unerledigten Wahlgang gelang es den Malediven nicht, rechtzeitig zum Ende der Amtszeit des alten Präsidenten einen neuen zu wählen - und zwar nur, weil in der Verfassung entsprechende Regeln fehlen.
 Nach der zögerlichen Entscheidung von Präsident Mohammed Waheed Hassan, vorerst im Amt zu bleiben, kam es gestern bereits zu ersten Ausschreitungen. Die Fronten in dem Konflikt sind klar verortet: Die Bevölkerung will den Bürgerrechtler Mohammed Nasheed als Präsidenten zurück - und Vertreter der Tourismusindustrie und des Militärs tun alles, um das zu vermeiden.
 Mehr dazu in Höchstrichter im Zweifelicht

No free elections
 Tourism industry and military against majority of people



Economic Figures Maldives

DATA ON GDP AND ECONOMIC INFORMATION																			
Central bank	100%																		
International Reserves	US\$ 348.65 million (Source: IMF, Data updated 2012)																		
Gross Domestic Product - GDP	US\$ 2.051 billion (2009 estimate)																		
GDP (Purchasing Power Parity)	3.014 billion of international dollars (2009 estimate)																		
Real GDP growth	<table border="1"> <thead> <tr> <th>Year</th> <th>2001</th> <th>2002</th> <th>2003</th> <th>2004</th> <th>2005</th> <th>2006</th> <th>2007</th> <th>2008</th> </tr> </thead> <tbody> <tr> <td>Growth</td> <td>3.0%</td> <td>6.5%</td> <td>8.9%</td> <td>9.0%</td> <td>-4.0%</td> <td>14%</td> <td>7.2%</td> <td>12.2%</td> </tr> </tbody> </table>	Year	2001	2002	2003	2004	2005	2006	2007	2008	Growth	3.0%	6.5%	8.9%	9.0%	-4.0%	14%	7.2%	12.2%
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GDP per capita - current prices	US\$ 4.230 (2009 estimate)																		
GDP per capita - PPP	\$8,378 International Dollars (2009 estimate)																		
GDP (PPP) - share of world total	<table border="1"> <thead> <tr> <th>Year</th> <th>1980</th> <th>1990</th> <th>2000</th> <th>2010</th> <th>2010**</th> </tr> </thead> <tbody> <tr> <td>Share</td> <td>0%</td> <td>0%</td> <td>0%</td> <td>0%</td> <td>0%</td> </tr> </tbody> </table>	Year	1980	1990	2000	2010	2010**	Share	0%	0%	0%	0%	0%						
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GDP - composition by sector	Agriculture 5.9% Industry 16.9% Services 77.8% (2009 estimate) <small>(Data released on February 2012)</small>																		

Source: Global Finance 2013
www.gfmag.com/gdp-data-country-reports/225-the-maldives-gdp-report.html#axzz2LWb0QAp

Tourism in numbers

- 1 million arrivals expected in 2013
- Close to 10 million guestnights
- Between 1 and 2 billion US\$ income from tourism
- Some 5000 US\$ income per person from tourism
- Income is unevenly distributed between
 - Influential families and their supporters „Oligarchs“
 - Maldivian nationals, „Middleclass“
 - Foreign workers „Underdogs“
- Situation is source of political unrest

Tourism

- Some 100 very exclusive tourism resorts
 - Within 40 years a very exclusive tourism developed
 - Initially targeted mainly for rich European clients
 - Currently Asian markets in particular China boom
 - Guest expenditures per day/night and person ranges from US\$ 100 to US\$ 4.000
 - Only seafood locally available
 - Everything else on Maldives has to be imported
 - There is a way around Islamic laws and standards
 - Alcohol allowed
 - Bikini allowed
 - Local Maldivians not allowed, only to serve during work
 - Tourism development is widely controlled by 10 local families and their foreign supporters/investors

Politics of tourism development

- During last 40 years a highly exclusive tourism could develop
- The political rulers of the island worked together with foreign investors
- Rich, well educated tourists mainly from Germany, Great Britain, Italy, visited Maldives
- Resorts are „European“ with regard to the tourist product
- Country is islamic
- Discrepancies were solved by seperation
 - Tourists and their islands
 - Normal people and their islands
 - Minimum interaction in parallel worlds



Tourism development

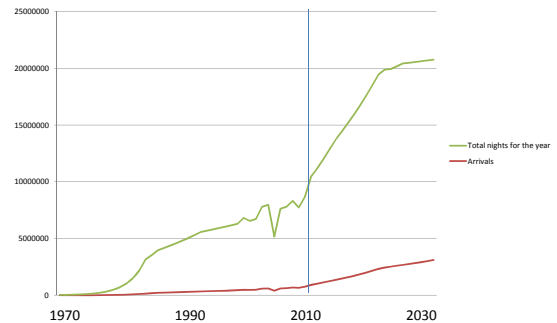
- In Reality this seperation cannot be sustained
 - Middle class inhabitants want to profit to higher degree
 - Guesthouses for middle class tourists
 - Challenge to previous exclusivity
- Democratic movements are suppressed
 - Change in tourism structure challenges also political system
 - Defense of old system with highly exclusive, targeted resorts
 - Environmental problems are likely to increase with new tourism policy

Growth of Tourism: a Government Program !?!!

- Within 10 years a doubling of tourism is expected, a tripling is possible:

The context of Maldives as a destination within the South Asia region needs to be given due consideration. The UNWTO report *Tourism Towards 2030* identifies South Asia as a primary growth region, with a forecast growth rate in international tourist arrivals of 6% a year between 2010 and 2030. This should be the base figure that Maldives should be targeting, achievement of which would produce 1.25 million arrivals in 2016 and almost 1.7 million by 2021. MOTAC's own forecasts for the period 2012 to 2017 target an average annual overall growth of 6.5%. A figure of almost 1.4 million is set for 2017 in MOTAC's forecasts, which, if the same rate were to be extended to 2021, would produce a figure of 1.75 million.

Growth of Tourism in Maldives



Source: Ministry of Tourism, Art and Culture, 2012, Fourth Tourism Masterplan 2012-17, Own interpolation

Vision of Marketing Organization

- The best tropical island destination in the world
- The most exclusive destination in South Asia
- The top tourism earner in South Asia
- An example of sustainable tourism development in small island nations

Protection of Environment: a Government Duty !?!!

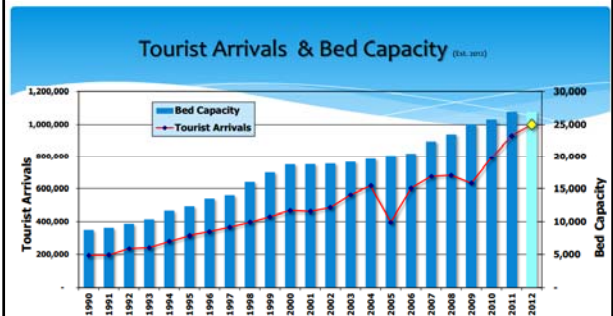
- No single aim towards save guarding the environment
- A tripling of capacity within 10 years is not impossible according to 4th tourism development plan
- No particular concern for the issue of the environment

Major Markets of Maldives Tourism



Source: Ministry of Tourism, Arts & Culture, Maldives 2011

Tourism in numbers



Source: Moosa Zameer Hassan (2012)
Ministry of Tourism Arts & Culture, Maldives

Development in last five years

Table 4: Bed Nights, Occupancy Rate and Duration of Stay, 2008 - 2012

Year	Bed Capacity in Operation (annual average)	Bed Night Capacity	Tourist Bed Nights	Bed Night Growth (%)	Occupancy Rate (%)	Average Duration of Stay (days)
2008	19,117	6,996,640	5,446,937	2.9	77.8	8.0
Resorts & Hotels	19,117	6,996,640	5,446,937	2.9	77.8	8.0
Guest Houses & Vessels	NA	NA	NA	NA	NA	NA
2009	20,137	7,338,221	5,150,688	-5.4	70.2	8.6
Resorts & Hotels	20,137	7,338,221	5,150,688	-5.4	70.2	8.6
Guest Houses & Vessels	NA	NA	NA	NA	NA	NA
2010	23,649	8,631,809	5,986,342	-	69.5	7.6
Resorts & Hotels	21,541	7,861,955	5,829,589	13.2	74.2	7.4
Guest Houses & Vessels	2,108	769,854	156,753	-	20.7	0.2
2011	24,493	8,939,306	6,529,200	9.1	73.1	7.0
Resorts & Hotels	22,507	8,214,987	6,358,578	9.1	77.5	6.8
Guest Houses & Vessels	1,987	724,319	170,622	8.8	23.4	0.2
2012	25,062	9,148,755	6,450,794	-1.2	70.6	6.7
Resorts & Hotels	23,483	8,572,045	6,317,206	-0.7	73.8	6.6
Guest Houses & Vessels	1,579	576,710	133,588	-21.7	23.4	0.1

Source: Ministry of Tourism, Arts and Culture
Note: Revised ✓

Yearbook 2013



Climate Change in Maldives

- Sea level rise up to 60cm in 2100
 - Highest points of Maldives is 2.6m
 - About 50% of the country would end up under water
- State savings for buying land to migrate all Maldivians
 - Nasheed the former and likely new president of Maldives announced this in a Spiegel interview in 2009

<http://cartethemes.com/maldives-islands-11273-hd-wallpapers.html>

Climate Change and Maldives

- Water temperature increase
 - can change the coral reef and the aquatic ecosystems

<http://www.grandshomaling.com/curapagos.htm>

New Development Projects

- More islands to be transformed to tourist resorts

<http://www.maldivian.com>

Sewage line into the Ocean

