

Appendix Two: Milford Opportunities Project (MOP) - Summary of the business case options

The following table sets out the MOP Board’s analysis of the shortlisted options for Milford Sound Piopiotahi outlined in its business case. Option 4 (highlighted) is the Board’s preferred option.

Options from the MOP business case	Option 1: Status quo – Declining visitor experience and conservation outcomes	Option 2: Focused infrastructure investment with modest charge	Option 3: Enhanced visitor experience with charge	Option 4: World-class experience with charge MOP preferred	Option 5: Pristine with reduced use with charge
Description	<ul style="list-style-type: none"> Maintain existing business as usual activities while minimising possible harm to conservation values No material additional funding, institutional or regulatory changes Uses existing regulatory and operational mechanisms to coordinate and improve combined efforts at Milford Sound Piopiotahi 	<ul style="list-style-type: none"> Incremental changes to regulatory and operational settings to better disperse visitors, improve visitor experience, and mitigate negative conservation effects Provide new tools to manage access with a statutory charge to fund upgrades and maintenance Infrastructure upgrades focus on corridor enhancement 	<ul style="list-style-type: none"> Delivers step change in visitor and conservation management in line with core elements of the Master Plan long-term vision Conservation investment limited to mitigating negative effects 	<ul style="list-style-type: none"> Immediate interventions on regenerative management, increase visibility of cultural narrative and Ngāi Tahu footprint Effectively manage impacts of tourism on land and water Option most closely aligned with the Master Plan’s intent, vision and objectives, although some changes proposed due to current feasibility testing (particularly informed by seismic risks) 	<ul style="list-style-type: none"> Limited access to Milford Sound Piopiotahi Strong conservation focus Tourism and infrastructure investment emphasises less exclusive experiences along the corridor Less access to and infrastructure in Milford Sound Piopiotahi Remove aerodrome, replaced with planting and greenspace.
Visitor Experiences and Conservation impact	<ul style="list-style-type: none"> Place and visitor experiences likely to continue to decline Continued risk to conservation and biodiversity outcomes within Milford Sound Piopiotahi Unlikely to meet Ngāi Tahu aspirations No ability to fund additional conservation activities 	<ul style="list-style-type: none"> Introduces greater choice of experiences and activities along corridor and new commercial opportunities New Te Anau Gateway to introduce the experience, incentivise more multi-day visitors, reduce weather dependency Some ability to spread visitors through more experiences distributed throughout the journey Increased opportunity to support cultural narrative Limited ability to fund long-term conservation activities 	<ul style="list-style-type: none"> Modernised visitor experience, more diverse experiences offered. Wow experiences (such as sense of arrival at Milford Sound Piopiotahi) unable to be implemented Smoothed travel flows, mode shift encouraged through introducing carpark booking system and vehicle management Creates new concession opportunities, predominantly in corridor Significant investment in strengthened cultural narrative Some improvements in conservation outcomes at margins of investment 	<ul style="list-style-type: none"> Investment befitting of world class experience across different investment choices, enables integrated management with Ki Uta Ki Tai Travel flows smoothed with introduction of additional access management levers Investment heavily tilted towards places for accessing transport options, compared to self-drive options New significant experiences within Milford Sound Piopiotahi and corridor Increased funding available for complementary conservation activities and world class nature experiences Significant uplift in cultural narrative and Ngāi Tahu footprint 	<ul style="list-style-type: none"> Encourage visitors to spend more time in Corridor rather than Milford Sound Piopiotahi Significant increase in conservation-related activity Return Milford Sound Piopiotahi to a more ‘natural’ environment, limited additional infrastructure investment Requires cancellation/ renegotiation of concession arrangements, fewer new commercial opportunities that Option 4 Limiting access to at Milford Sound Piopiotahi to premium visitors may reduce visits and revenue from access charge (Milford Sound Piopiotahi is main draw to Fiordland National Park)
Managing access	<ul style="list-style-type: none"> Incremental improvements, primarily through the Milford Road Alliance 	<ul style="list-style-type: none"> Improve the management of access over time through existing and new concession arrangements to spread the flow of visitors and reduce congestion 	<ul style="list-style-type: none"> Improved model for managing access through concession arrangements Introduce incentives for visitors to reduce private vehicle use 	<ul style="list-style-type: none"> Managed access model to optimise visitor flow, primarily through concession arrangements and carparking management Provide alternative transport options through new concession arrangements to reduce private vehicle use 	<ul style="list-style-type: none"> Restrict access via private vehicles and a permit system Alternative transport options in place
Infrastructure prioritisation	<ul style="list-style-type: none"> Renewals and maintenance required to manage current levels of service 	<ul style="list-style-type: none"> Maintain current levels of service Modest investment in cultural narrative Targeted investment in small number of corridor experiences to achieve incremental dispersal of vehicles Minimal changes are Milford Sound Piopiotahi 	<ul style="list-style-type: none"> New and improved experiences and accommodation options in the corridor to disperse visitors Improvements in Milford Sound Piopiotahi focused on enabling smooth flow of visitors and ferry terminal improvements Moderate reduction in car parking (40%) Investment in cultural narrative within the Milford corridor and Milford Sound Piopiotahi 	<ul style="list-style-type: none"> New and improved experiences and accommodation options in the corridor to disperse visitors Provision of further short experiences in Milford Sound Piopiotahi to complement boat cruises Ferry terminal improvements Significant reduction in car parking (60%) Investment in cultural narrative within the Milford corridor and Milford Sound Piopiotahi 	<ul style="list-style-type: none"> Limited further visitor infrastructure in Milford Sound Piopiotahi, with focus on limiting the physical footprint Refurbishment of existing visitor centre, provision of lookout points and short walk experiences New and improved experiences and accommodation options in Milford corridor, to disperse visitors
Managing commercial activities	<ul style="list-style-type: none"> Work within current concessions framework, renegotiation as terms expire 	<ul style="list-style-type: none"> Renegotiate concessions on good faith to achieve outcomes 	<ul style="list-style-type: none"> Renegotiate concessions to achieve visitor experience and conservation outcomes New concessions opportunities created through new experiences and infrastructure 	<ul style="list-style-type: none"> New, bespoke concessions approach with greater scope for setting conditions relative to visitor experience and conservation outcomes Renegotiate and re-issue concessions to promote competition and enable innovation/enterprise New concessions opportunities created through new experiences and infrastructure 	<ul style="list-style-type: none"> New, bespoke concessions approach with greater scope for setting conditions relative to visitor experience and conservation outcomes Renegotiate and re-issue concessions to promote competition New concessions opportunities created through new experiences and infrastructure
Funding	<ul style="list-style-type: none"> Crown/Agency baselines 	<ul style="list-style-type: none"> Introduce modest access charge Seek through other funding sources (e.g. NLTF) 	<ul style="list-style-type: none"> Introduce charge to fund key infrastructure upgrades and conservation projects Potential Crown funding required 	<ul style="list-style-type: none"> Charge to fund key infrastructure upgrades and conservation projects on an ongoing (financially sustainable) basis 	<ul style="list-style-type: none"> Charge to fund key infrastructure upgrades and conservation projects on an ongoing (financially sustainable) basis
Governance and delivery implications	<ul style="list-style-type: none"> Likely delivered through existing planning (FNPNP) and delivery arrangements 	<ul style="list-style-type: none"> Likely requires incremental changes made through existing planning and institutional arrangements 	<ul style="list-style-type: none"> Likely requires non-statutory instruments to establish shared vision and strategy to guide DOC, local government and private operators Existing roles likely to continue 	<ul style="list-style-type: none"> New approach and introduction of specific investment and delivery entity (either within DOC or separate) Backed by new and/or adapted statutory instruments 	<ul style="list-style-type: none"> New approach and introduction of specific investment and delivery entity (either within DOC or separate) Backed by new and/or adapted statutory instruments