

DRAFT FINAL REPORT

BIMP – EAGA Community Based Ecotourism Strategy 2010 – 2015

September 2010

ABBREVIATIONS

ADB	–	Asian Development Bank
ASEAN	–	Association of South East Asian Nations
ATSP	–	ASEAN Tourism Strategic Plan
BETC	–	BIMP–EAGA Tourism Council
BEBC	–	BIMP–EAGA Business Council
BIMP-EAGA	–	Brunei Darussalam, Indonesia, Malaysia, Philippines East ASEAN Growth Area
BIMP-FC	–	Brunei Darussalam, Indonesia, Malaysia, Philippines East ASEAN Growth Area Facilitation Center
CBET	–	Community-Based Ecotourism
CIQS	–	Customs, Immigration, Quarantine and Security
EAGA	–	East ASEAN Growth Area
GTZ	–	German Technical Cooperation
HoB	–	Heart of Borneo
ICT	–	Information and Communications Technology
IIPPT	–	International Institute for Peace through Tourism
IUCN	–	The World Conservation Union
JTDC	–	Joint Tourism Development Cluster
HRD	–	Human Resource Development
MSME	–	Micro Small and Medium Enterprises
NESC	–	National Ecotourism Steering Committee
NZAID	–	New Zealand Aid
NES	–	National Ecotourism Strategy
NEDC	–	National Ecotourism Development Council
NEP	–	National Ecotourism Plan
NGO	–	Nongovernment Organization
NTO	–	National Tourism Organization
PCU	–	Program Coordination Unit
PIU	–	Project Implementation Unit
SARS	–	Severe Acute Respiratory Syndrome
SME	–	Small and Medium Enterprise
SOMM	–	Senior Officials and Ministers Meeting
SWOT	–	Strengths, Weaknesses, Opportunities and Threats
TIID	–	Transport, Infrastructure, and ICT Development
UNESCO	–	United Nations Educational, Scientific and Cultural Organization
UNWTO	–	United Nations World Tourism Organization
WWF	–	World Wildlife Fund

NOTE

\$ refers to US dollars in this report

km = kilometers

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EXECUTIVE SUMMARY

The Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area (BIMP–EAGA) subregional cooperation framework recently adopted community-based ecotourism as a key development activity to help narrow the development gap across and within EAGA member countries. Community-based ecotourism is form of sustainable tourism that emphasizes the central role and empowerment of communities to utilize natural, cultural and historic assets for tourism that supports local economic development and heritage protection.

Current forecasts indicate that despite the global economic turmoil of 2008-09 international tourist arrivals to the BIMP–EAGA subregion could increase from 4.5 million in 2009 to 7.2 million by 2015. The corresponding rise in annual foreign exchange receipts from tourism would exceed \$4.68 billion. Domestic tourism in the subregion’s focal areas is also expanding rapidly and intra-EAGA arrivals are expected to top 18 million by 2015.

Despite harboring some of the Earth’s richest marine and terrestrial biodiversity together with vibrant cultural resources, the subregion has not been able to fully realize its potential to become a world-class ecotourism destination. Some of the main factors constraining tourism development in BIMP–EAGA, –in particular community-based ecotourism– are the lack of a coherent, mutually agreed subregional destination and site development framework; underdeveloped gateway, last mile and community infrastructure; limited private sector investment in ecotourism-related tour products and services; and a lack of knowledge and skills at the local level to exploit livelihood opportunities linked to the tourism sector. In addition, the subregion’s existing ecotourism products and Equator Asia brand are not widely known in key source markets because of a lack of targeted marketing and promotion activities.

Recognizing the need for a coordinated approach to overcome these challenges, the EAGA countries requested and received ADB technical assistance to assist them prepare the BIMP–EAGA Community-Based Ecotourism Strategy 2010-2015. The strategy is set within the context of the BIMP–EAGA Road Map to Development and ASEAN Tourism Strategic Plan. It is aligned and harmonized with EAGA government’s national tourism plans and policies and incorporates the suggestions and aspirations of a broad range of stakeholders that were consulted during its formulation.

The goal or expected impact of the strategy is *“Thematic multi-country community-based ecotourism circuits, destinations and sites are developed that attract high-yielding global markets, where communities in partnership with the private sector directly benefit from tourism activities that valorize and enhance the protection of the subregion’s rich natural and cultural heritage.”*

Three core strategic programs with nine priority projects are proposed for implementation from 2010 to 2015. Priority projects aim to improve tourism related infrastructure and enhance human resources, community and private sector participation, micro small and medium enterprise development, natural and cultural heritage protection, and marketing and promotion. The estimated cost of implementing the strategy’s priority projects from 2010 to 2015 is \$63.2 million, of which tourism related infrastructure accounts for about \$50 million.

Mainstreaming the strategy’s guiding principles into subregional tourism development will help position BIMP–EAGA as a leading community-based ecotourism destination with a range of exceptional culture, nature and adventure products that attract international tourists and offer the subregion’s citizens opportunities for wholesome recreation and educational activities. Trade, investment and tourism in the subregion will benefit from growth in the number of total tourist

arrivals and an increase in the proportion of higher spending market segments that drive demand for value-added goods and services.

Implementation of the strategy will double the share of international arrivals participating in community-based ecotourism to 20% by 2015, equivalent to 1.4 million visitors that will generate \$910 million in foreign exchange and sustain 173,000 direct and indirect jobs. Its programs will foster more inclusive economic growth, empower women, and strengthen measures to conserve and protect heritage resources which will contribute to raising at least 15,000 households above national poverty lines in the subregion's focal areas by 2015.

Overall coordination of the strategy will be performed by a small and dedicated BIMP–EAGA Tourism Council Secretariat together with the BIMP–EAGA Facilitation Center. The annual Joint Tourism Development Cluster meeting will provide policy guidance and review progress and lessons learned while implementing the strategy.

The Tourism Council Secretariat will lead implementation of the subregional marketing and promotion program that should complement the Joint Tourism Development Cluster's 'Equator Asia' initiative and ASEANs 'Southeast Asia - feel the warmth' campaign. All other programs will be coordinated by Program Coordination Units to be established in National Tourism Offices or agencies deemed appropriate by EAGA governments. Implementation of priority projects will be managed at the state and local level by line government agencies in cooperation with relevant stakeholders.

INTRODUCTION

1. Background

1. The Brunei Darussalam-Indonesia-Malaysia-Philippines East ASEAN Growth Area¹ (BIMP–EAGA) subregional cooperation framework has identified community-based ecotourism (CBET) as an important development activity that can contribute to poverty reduction, natural resource conservation, and sustaining the traditions and livelihoods of local communities. Recognizing the need for a more coordinated approach to CBET development in the subregion, the BIMP–EAGA countries requested and received ADB technical assistance² to assist them prepare a subregional community-based ecotourism strategy covering 2010 to 2015. Following several months of broad consultations with subregional tourism stakeholders a draft strategy was presented and discussed at the 7th Meeting of the BIMP–EAGA Joint Tourism Development Cluster (JTDC) on 9 June 2010 in Puerto Princesa, Palawan, Philippines. Subsequent JTDC comments and suggestions to enhance the draft strategy were incorporated into the final report that will be presented to EAGA Senior Officials for endorsement in September 2010.

2. Definition of Community-Based Ecotourism

2. Community-based ecotourism is form of ecotourism³ that emphasizes the central involvement and empowerment of communities to utilize natural, cultural and historic assets for tourism. CBET is designed and operated with due consideration given to ecological and social sustainability. It must be economically viable and socially inclusive, offer educational opportunities for host and visitor, and spread the benefits of tourism widely among communities. The central role of the community differentiates CBET from other forms of ecotourism that may emphasize nature conservation as the main objective.

3. Methodology and Approach

3. The methodology used to prepare the BIMP–EAGA Community-Based Ecotourism Strategy is characterized by a high degree of public participation. Extensive consultations between the team that drafted the strategy and local communities, private sector tourism stakeholders, and local, state and national governments has captured their aspirations for CBET in the subregion. Key documents and reports that were reviewed during the formulation of the strategy include the BIMP–EAGA 2006-2010 Roadmap to Development, reports on EAGA Senior Official's Meetings and Minister's Meetings, minutes of Joint Tourism Development Cluster Meetings, tourism development plans of EAGA countries and the draft ASEAN Tourism Strategic Plan that is expected to be approved by ASEAN leaders in late 2010. This participatory approach has produced a subregional CBET strategy that is responsive to stakeholder inputs and closely aligned with existing subregional tourism plans and policies.

¹ The focal subnational areas of BIMP-EAGA are (i) the provinces of Kalimantan, Sulawesi, Maluku and Papua in Indonesia; (ii) the states of Sarawak and Sabah and the federal territory of Labuan in Malaysia; and (iii) the provinces of Mindanao and Palawan in the Philippines. Brunei Darussalam is a full state member of EAGA. The member countries use the term BIMP-EAGA or EAGA to refer to the subregional cooperation initiative and the geographic subregion.

² Under TA - 6462 (REG): Institutional Development for Enhanced Subregional Cooperation in the aSEA Region

³ IUCN defines ecotourism as "environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and any accompanying features - both past and present) that promotes conservation, has low negative visitor impacts, and provides for beneficially active socio-economic involvement of local populations.

4. Report Structure

4. Part A of the strategy contains background information on BIMP–EAGAs subregional tourism cooperation initiatives, ecotourism assets and tourism trends. The challenges of developing tourism –in particular community-based ecotourism– are explored within the subregional context followed by a discussion on the rationale behind proposed interventions to address these challenges. Part B sets out the strategy’s proposed vision, guiding principles, impacts and outcomes. Part C presents the strategic programs to accelerate subregional CBET destination and product development, increase private sector and community participation, enhance tourism and heritage management capacity and effectively promote the subregion as a premier CBET destination. Part D summarizes the proposed organizational structure and role of key stakeholders to facilitate implementation of the strategy. Results monitoring is discussed in Part E. A list of priority projects for implementation from 2010 to 2015 is in Appendix 1 and the strategy’s monitoring framework is in Appendix 2.

A. BACKGROUND AND CONTEXT

1. Overview of the Subregion

5. The BIMP–EAGA subregion comprises a land area of approximately 1.6 million km² and has a combined population of about 60 million people, including substantial populations of indigenous ethnic groups living in its forests, coastal lands and small islands. The subregion is characterized by extremely rich terrestrial and marine biodiversity, containing the world’s most biodiverse marine ecosystem and two of the world’s largest tropical rainforests⁴. Strategically located astride the busiest shipping lane in the world the subregion has a long history of participation in the global economy, particularly through fisheries, forestry, mining, and agriculture. At present BIMP–EAGAs main economic sectors are agro-industry, fisheries, tourism, transportation, shipping, and energy. While access to some remote parts of the subregion are limited, there is good connectivity between major population centers and EAGA member states are investing heavily to improve and integrate air, sea, and road transportation networks. Subregional infrastructure investments coupled with the EAGA government’s strong support for small and medium enterprises is expected to give a boost to the tourism industry and other service sectors during the upcoming decade.

2. Ecotourism Assets

6. BIMP–EAGAs prime ecotourism attractions include large tracts of tropical forests, pristine marine areas, abundant wildlife, vibrant cultural heritage and distinct indigenous knowledge. Its rainforests are among the oldest and most biologically diverse in the world. Protecting them is a high priority of international campaigns to stem species extinction and reverse climate change. A key subregional conservation initiative included in the BIMP–EAGA cooperation framework and endorsed by ASEAN leaders is “The Heart of Borneo” (HoB) that aims to protect 220,000 km² of equatorial rainforest in Brunei Darussalam, Malaysia and Indonesia.

7. Located at the confluence of the Indian and Pacific Oceans, spanning Indonesia, Malaysia, Papua New Guinea, Philippines, Solomon Islands and Timor-Leste is the 6 million km² Coral Triangle. This ecosystem is a world-class ecotourism asset, supporting the highest concentration of marine biodiversity on the planet including more than 3,000 species of fish. Over 500 reef-building

⁴ The Coral Triangle and forests of Borneo and Indonesian province of Papua

corals and 51 types of mangrove form extensive reef ecosystems which help to buffer coastal communities from cyclones and tsunami. EAGA governments are working closely with the international nongovernment organizations (NGOs) Conservation International, The Nature Conservancy and World Wildlife Fund for Nature (WWF), among others, to establish a network of marine protected areas here to increase populations of threatened and endangered species. In addition to the HoB and Coral Triangle the subregion has several accessible UNESCO World Heritage Sites. A profile of BIMP–EAGAs ecotourism assets in each focal area and related ecotourism activities is provided in table 1.

Table 1: Profile of BIMP–EAGA ecotourism assets

Focus Area	Land Area	Est. 2009 Population	Main Gateways	Ecotourism Assets	Ecotourism Activities
Brunei Darussalam	5,765 km ²	388,190	Bandar Seri Begawan	Pristine rainforests, coral reefs, mangrove covered islands, white sand beaches and protected areas such as the renowned Ulu Temburong National Park.	Diving, snorkeling, wildlife viewing, nature walks
Indonesia					
Kalimantan	547,891 km ²	12 million in 4 provinces	Pontianak, Balikpapan, Samarinda	Extensive rainforest covered mountain, river and coastal wetland wilderness with Dayak indigenous people and 8 national parks including the 8,000km ² Betung Keerihun National Park, a proposed UNESCO World Heritage site.	Wildlife, indigenous cultural heritage, adventure and river/forest safaris
Sulawesi	174,600 km ²	16 million in 6 provinces	Makassar and Manado	Set within the Coral Triangle. Diverse lowland and mountain forests. 8 national parks, including Bunaken National Marine Park a proposed UNESCO World Heritage Site.	Diving, snorkeling, and forest wildlife
Maluku	77,990 km ²	2 million in 2 provinces	Ternate and Ambon	Extensive and rich marine biodiversity, coral reefs, vegetated volcanic islands, white sand beaches and historic heritage associated with the spice trade.	Diving, snorkeling, and sightseeing.
Papua	421,981 km ²	~ 2.6 million in 2 prov.	Sorong and Biak	Vast marine, coastal and mountain landscape including highest mountain in South East Asia with permanent glaciers at 4,884m, a large number of indigenous ethnic cultures, and 5 protected areas of which the 25,050km ² Lorentz National Park is inscribed on the UNESCO World Heritage List.	Wildlife, indigenous cultural heritage, river/forest safaris, diving & snorkeling
Malaysia					
Sabah	76,115 km ²	3.7 million	Kota Kinabalu and Sandakan Kuching	Extensive coastal and mountain rainforests, island and coral reef ecosystems with a vast array of plant and animal species, 7 National Parks including Kinabalu National Park, a UNESCO World Heritage Site with 4,095m Mt. Kinabalu.	Wildlife, forest adventure, cultural heritage, diving & snorkeling
Sarawak	124,450 km ²	2.5 million	Labuan Airport/Ferry Terminal	Extensive coastal lowland rainforest, river and mountain rainforests with a rich indigenous cultural heritage. 22 protected areas including the UNESCO World Heritage Site Gunung Mulu National Park .	Wildlife, cultural heritage, adventure, river/forest safaris
Labuan	85 km ²	90,000		Main island plus 6 smaller islands with extensive lowland tropical rainforest cover, beaches and coral formations.	Beach resort and wreck diving

Focus Area	Land Area	Est. 2009 Population	Main Gateways	Ecotourism Assets	Ecotourism Activities
Philippines					
Palawan	14,649 km ²	700,000	Puerto Princessa & Coron/ Busuanga	2,000 kilometers of coastline and islets with fine white sandy beaches. Coastal wetland and karst mountain rainforests with vast biodiversity. Puerto-Princesa Subterranean River National Park and the Tubbataha Reefs Marine Park, both UNESCO World Heritage Sites	Wildlife, forest adventure, cultural heritage, diving & snorkeling
Mindanao	97,530 km ²	21.6 million	Davao, Zamboanga, General Santos City and Cagayan de Oro	Extensive coastal wetland and mountainous interior landscape bounded by the Sulu Sea, the Philippine Sea, and the Celebes Sea containing a rich forest and marine biodiversity and indigenous ethnic communities such as the T'boli culture around Lake Sebu, and 11 protected areas including Mt. Apo National Park and the Agusan Marsh.	Wildlife, forest adventure, cultural heritage, resorts, and sightseeing.

3. Subregional Tourism Cooperation

8. The BIMP–EAGA subregional cooperation initiative was formally launched in 1994 as a joint strategy of the participating governments to accelerate social and economic development in underdeveloped and remote areas. Implementation of subregional priority projects and activities is currently guided by the 2006–2010 Road Map to Development. The overall strategic objectives of the Road Map are promotion of intra and extra-EAGA trade and investment in agro-industry, natural resources, transport, tourism, infrastructure and information and communication technology (ICT). Particular emphasis is placed on small and medium enterprise (SME) development in all sectors. 2010 targets are to increase trade and investment by 10% in all priority sectors and increase subregional tourist arrivals by 20% against 2006 baseline figures. The Road Map also includes measures to improve natural resource management, accelerate economic integration, and strengthen intra-EAGA institutional coordination. Within this context, a subregional approach to tourism development is closely linked to all of the Road Map's subregional cooperation measures and is expected to play a prominent role in narrowing the development gap between and across EAGA member countries by creating jobs and income for the poor and providing incentives for improved natural resource management.

9. To coordinate and implement projects in priority sectors subregional Working Group Clusters have been established including: (i) Transport, Infrastructure, and ICT Development, (ii) Natural Resource Development, (iii) Small and Medium Enterprise Development, (iv) Joint Tourism Development, and (v) Customs Immigration, Quarantine and Security (CIQS). Working groups generally meet on an annual basis to address a range of sector-specific and cross-cutting issues, with private sector interests represented by the BIMP–EAGA Business Council. Subregional coordination within and across working groups is assisted by the BIMP–EAGA Facilitation Center based in Kota Kinabalu, Malaysia. Working group meetings and other subregional development forums identify the issues tabled during the annual Senior Officials and Ministers Meeting (SOMM) and the BIMP–EAGA Leader's Summit. The SOMM and Leader's Summit are the main subregional forums for high-level consultations on the various EAGA cooperation initiatives.

10. Priority tourism-related initiatives included in the Road Map that were confirmed during recent consultations with the Joint Tourism Development Cluster are to (i) improve air, sea and land connectivity to and between the subregion, (ii) increase the quantity and quality of the subregion's tourism products and raise priority market's awareness of subregional product

offerings, (iii) encourage better value for money, and (iv) facilitate more convenient travel to and within the subregion by streamlining cumbersome CIQS procedures.

4. Global, Regional and Subregional Tourism Trends and Outlook

11. After growing at an annual rate of 4% for nearly a decade, global international tourist arrivals reached 880 million in 2009, a decline of 4.2% against 2008 figures. In 2009, international tourism receipts are estimated to have reached \$852 billion worldwide, down from a historic peak of \$942 billion in 2008. The 2009 decline was due primarily to the economic crisis of 2008-09 and recession that followed. The United Nations World Tourism Organization (UNWTO) reports a slightly brighter outlook in 2010, with international tourist arrivals totaling 119 million during the first two months of the year, equivalent to a 7% increase compared to the same period in 2009 but still slightly underperforming 2008.

12. Between 2001 and 2008 international arrivals to ASEAN grew by 6.5% per annum. In 2009 ASEAN is estimated to have received 62 million international arrivals or some 7% of the global market with ASEAN arrivals actually increasing by 0.5% against 2008 figures, contrary to the global decline. This increase was mainly due to robust intra-ASEAN travel and a jump in international arrivals to Malaysia. It is noteworthy that the intra-ASEAN market share of total ASEAN arrivals increased from 44.6% in 2006 to nearly 50% in 2009.

13. Total international arrivals to the BIMP-EAGA subregion peaked at 5.1 million in 2008 after increasing by an average annual rate of 8.2% between 1995 and 2008. Although 2008 and 2009 data for the entire subregion are not yet available, arrivals to Sabah and Sarawak, Indonesia, which account for about 70% of the subregion's international arrivals, indicate that total international tourism volumes to the subregion probably decreased to around 4.5 million in 2009. International visitor's average length of stay is estimated to be 7 days with per capita expenditure averaging \$650 or \$92.85 per day.

Table 2: Trends in International Tourism (million arrivals) 1995 – 2008

Area	1995	2008	2009	2008/09 change	CAGR
World	565	919	880	- 4.2%	3.2%
East Asia/Pacific	79	184	180.9	- 1.7%	6.1%
ASEAN	29.7	61.7	62	0.5%	5.4%
BIMP-EAGA*	1.5	5.1	4.5	- 11.8%	8.2%
Market Share					
Asia Pacific	14.0%	20.0%	20.6%		
ASEAN	5.3%	6.7%	7.0%		
BIMP-EAGA*	0.3%	0.6%	0.5%		

Source: UNWTO; *consultants estimates; CAGR = compound annual growth rate

14. Based on 2007 immigration data the main subregional source markets are 6 ASEAN⁵ countries, the United States, Germany, the United Kingdom, Australia, Japan, South Korea, Hong Kong, and China. About 70% of arrivals report visiting for holiday and leisure purposes. Visitor's main interests are nature and culture-based leisure and adventure activities including, for example, excursions, visiting ethnic communities, diving, trekking, white-water rafting and rock climbing. It is

⁵ Brunei Darussalam, Indonesia, Malaysia, Philippines, Singapore, and Thailand

estimated that the intra-EAGA tourism market is growing about 10% annually with 12 million domestic tourists vacationing in the subregion during 2007.

15. Data on the economic impact of tourism in the subregion is generally not available therefore assumptions are extrapolated from known multipliers in the Greater Mekong Subregion where comparable conditions exist. Based on a per capita spend of \$650 and 4.5 million arrivals total subregional tourism receipts were \$2.93 billion in 2009. The ratio of tourist expenditure to direct and indirect job creation in the Greater Mekong Subregion is one job for every \$5,159 of tourist expenditure in 2009 prices⁶. It is therefore estimated that the subregion's international tourism flows supported around 563,000 jobs in 2009.

16. With growing signs the 2010 economic recovery will be sustained, UNWTO has maintained its long term forecast of 1.6 billion international arrivals and \$2 trillion in gross receipts worldwide in 2020. The corresponding 2020 forecast for the ASEAN region is 136 million international arrivals or 8.5% of the global market.

Table 3: UNWTO International Tourism Outlook (million international arrivals) 2009 – 2020

Area	2009	2015	2020	CAGR
World	880	1,202.6	1,560.0	6.3%
East Asia/Pacific	180.9	277.7	397.0	7.4%
ASEAN	62	95.2	136.0	7.4%
BIMP-EAGA*	4.5	7.2	9.9	10.7%

Source: UNWTO; *consultants estimates. CAGR = cumulative annual growth rate

5. Demand for Ecotourism

17. The International Ecotourism Society and UNWTO report that more and more international travelers are purposefully selecting vacation destinations that protect the environment and present options for socially responsible travel. This global market of "responsible travelers" is growing up to three times faster than any other market segment. Based on UNWTO and International Ecotourism Society estimates, it is probable that about 10% of the global tourism market engages in some form of ecotourism while on holiday. Applying this ratio to the subregion's current volume of international arrivals suggests that in 2009, 450,000 international visitors could be classified as ecotourists. A baseline of 450,000 ecotourists in 2009 is likely conservative given the subregion's outstanding ecotourism attractions. The Malaysian states of Sabah and Sarawak recorded 2.67 million international arrivals in 2009 and may already account for an ecotourism market of this size.

18. While in-depth market research is currently needed to better understand the subregion's international and domestic ecotourism markets, ecotourists are known to share some common traits⁷. They are usually well educated and experienced travellers with high levels of disposable income, proficient users of the world-wide-web and social networking services, and are principally influenced by the Internet and word of mouth when selecting a destination to visit. Typically urban educated professionals over 25 years old, they prefer to travel in small groups, minimize impacts on the natural and cultural landscape, and expect a high level of specialized interpretation as part of a tour program. An ecotourist will make an effort to patronize businesses that are environmentally and socially responsible and willingly pay a premium while doing so.

⁶ assuming 5% expenditure inflation off a baseline of \$3,850 in 2003

⁷ International Ecotourism Society Global Ecotourism Fact Sheet (2006)

6. Policy, Planning, and Institutional Support Framework for Ecotourism Development

19. At the ASEAN level, the ASEAN Tourism Strategic Plan 2011-2015 (ATSP) highlights the value of ASEANs world-class marine, terrestrial, and cultural tourism assets and their ability to attract long haul and intra-ASEAN travelers seeking ecotourism activities as well as traditional markets interested in resort-based and sightseeing vacations. In this context, the ATSP sets out a framework to encourage joint marketing and development of subregional circuits and packages, including ecotourism circuits and products. The ATSP also emphasizes the need to establish common tourism enterprise standards through accreditation and certification programs, improve connectivity between ASEAN members, and strengthen institutional capacities to implement and monitor regional tourism initiatives. BIMP–EAGAs Joint Tourism Development Cluster agenda and the Community-Based Ecotourism Strategy are aligned, harmonized and complimentary to the strategic thrusts of the ATSP.

20. All EAGA countries and focus areas include ecotourism as a key element of their tourism development plans and programs. There is a shared understanding that promoting ecotourism is one way to differentiate a destination, diversify markets and spread the benefits of tourism to less advantaged communities. It is also commonly accepted that well-planned ecotourism can raise funds and awareness to support natural and cultural heritage conservation.

21. The national tourism organizations (NTOs) of the four EAGA countries⁸ set the overall policy framework for tourism development and all have made good progress towards formulating and promulgating ecotourism-friendly policies. Malaysia adopted a National Ecotourism Plan in 1996 and an Eco and Agro Tourism Implementation Committee has been established to coordinate implementation of the plan. The Philippines National Ecotourism Strategy (NES) dates to 2002, with a National Ecotourism Development Council (NEDC) responsible for coordinating the implementation of ecotourism-related policies. A National Ecotourism Steering Committee (NESC) and Regional Ecotourism Committees implement programs and activities approved by the NEDC and an Ecotourism Technical Working Group (ETWG) provides technical and administrative support to the NEDC and the NESC. After joining UNWTO in 2007 Brunei Darussalam is taking steps to develop a national ecotourism strategy. Indonesia’s Environmental Impact Management Agency is formulating a sustainable tourism development strategy that will include guidelines on developing different forms of tourism, including ecotourism.

22. A range of state, regional, provincial and local governments (including one national government—Brunei) maintain tourism offices to promulgate national tourism policy guidelines. Ongoing achievements are built on the planning, product development, marketing, and regulatory functions of these tourism offices that work closely with the private sector. Most of these offices, especially in Sabah, Sarawak, and Palawan heavily promote ecotourism development. Despite a favorable policy environment and high level of interest among EAGA leaders, the institutional capacity to plan, implement and monitor ecotourism at the local level generally remains limited, especially in the subregion’s remote areas.

7. Activities of the Development Partners

23. Subregional cooperation measures to promote tourism that are included in the EAGA Road Map to Development are supported by ADB, the German Technical Cooperation Agency (GTZ), and the ASEAN Japan Centre. Recent activities of the development partners include ADB assistance to prepare the BIMP–EAGA Community-Based Ecotourism Strategy, support for JTDC

⁸ Brunei Tourism, a division of the Ministry of Industry and Primary Resources. Ministry of Culture and Tourism, Indonesia; Ministry of Tourism, Malaysia, and; Department of Tourism, Philippines

meetings, technical assistance to streamline CIQS procedures⁹ and a mid-term review of the Road Map's tourism components. GTZ provides institutional capacity building support and assisted the EAGA countries develop and launch the Equator Asia brand. In 2008, GTZ also assisted the JTDC organize a subregional community-based ecotourism conference in Manado, Indonesia. The ASEAN Japan Center supports marketing and promotion of the subregion as a single destination, subregional representation at travel and trade fairs in Japan, youth exchange visits, study tours, and capacity building for public officials and the private sector.

24. Conservation International, WWF, IUCN, and other NGOs promote ecotourism as part of wider subregional conservation programs such as the Coral Triangle and Heart of Borneo with the objective of providing alternative livelihood opportunities for poor communities living within or adjacent to marine and terrestrial protected areas.

8. Analysis of Strengths Weaknesses, Opportunities and Threats

25. With the exception of Brunei Darussalam, a lack of transport linkages and inadequate infrastructure are common impediments to CBET development throughout much of the subregion. Figure 1 summarizes an analysis of the subregion's competitive CBET strengths, weaknesses, opportunities and threats.

Figure 1: Analysis of Competitive Strengths, Weaknesses, Opportunities, and Threats (SWOT)

STRENGTHS	WEAKNESSES
<p>Resources:</p> <ul style="list-style-type: none"> • Globally significant marine and terrestrial biodiversity • Cultural diversity and authenticity of indigenous traditions and customs <p>Policies:</p> <ul style="list-style-type: none"> • Supportive government policies and legislation for tourism development • Tourism is identified as a flagship sector • Robust subregional tourism cooperation framework in place and subregional adoption of ASEAN Common Competency Standards for Tourism • ASEAN Open Skies Road Map <p>Infrastructure and Facilities:</p> <ul style="list-style-type: none"> • Good gateway infrastructure and support services at most major destinations • Improving air and overland connectivity between main urban areas • Close proximity to large Asian markets <p>Tourism Industry Framework:</p> <ul style="list-style-type: none"> • Subregional tourism cooperation framework and mechanisms in place • Strong entrepreneurial skills of the private sector • Established "Equator Asia" brand <p>Related Initiatives:</p> <ul style="list-style-type: none"> • Coral Triangle • Heart of Borneo • ASEAN Tourism Strategy 	<p>Resources:</p> <ul style="list-style-type: none"> • Inadequate protection of marine and terrestrial biodiversity • Limited human resources to lead CBET development processes <p>Policies:</p> <ul style="list-style-type: none"> • Weak enforcement of natural and cultural heritage management regulations <p>Infrastructure and Facilities:</p> <ul style="list-style-type: none"> • Inadequate small-scale community infrastructure (e.g. tourist facilities, sanitation, water supply) • Poor communication links with remote areas • Poor last mile access between the main gateways and ecotourism sites • Gaps in air links between some destinations <p>Tourism Industry Framework:</p> <ul style="list-style-type: none"> • Limited supply of quality CBET products and tour packages • Low market awareness of ecotourism opportunities in the subregion • Inconsistent service quality • Weak CBET policy, planning and project management capacities in local government institutions • Lack of a clear subregional spatial destination framework to guide CBET development • Limited local community participation in the tourism sector • Lack of private sector and community awareness about how to form mutually beneficial partnerships

⁹ R-PATA 7552 Support for Trade Facilitation in BIMP-EAGA

OPPORTUNITIES	THREATS
<p>Resources:</p> <ul style="list-style-type: none"> • Complement biodiversity conservation initiatives (e.g. Coral Triangle, Heart of Borneo) with a CBET destination development program that promotes active community and private sector participation to protect biodiversity and cultural heritage resources <p>Policies:</p> <ul style="list-style-type: none"> • Create an enabling environment to foster public, private and community partnerships that accelerate CBET development • Designate thematic multi-country ecotourism circuits with clearly identified CBET sites that are prioritized for development <p>Infrastructure and Facilities:</p> <ul style="list-style-type: none"> • Engage major donors and lenders to provide financing for improving gateway infrastructure and “last mile” access between the gateway centres and ecotourism destinations and sites. • Mobilize resources to develop small-scale community-based infrastructure • Provide incentives for private sector investment in eco-friendly resorts and tour programs at priority sites <p>Market Awareness:</p> <ul style="list-style-type: none"> • Improve subregional framework to jointly market multi-country CBET destinations and sites in the subregion, including development of sustainable finance mechanisms for marketing initiatives 	<p>Resources:</p> <ul style="list-style-type: none"> • Biodiversity loss/degradation and erosion of cultural heritage • Marine and terrestrial pollution and deforestation <p>Policies:</p> <ul style="list-style-type: none"> • Reliance on “trickle-down” tourism policies over more inclusive “bottom up” development • Inadequate enforcement of biodiversity and cultural heritage safeguards <p>Tourism Industry Framework:</p> <ul style="list-style-type: none"> • Improperly managed mass tourism • Long haul markets growing concerns with environmental impacts of inter-continental travel <p>Security, Health and Safety:</p> <ul style="list-style-type: none"> • Security concerns in some areas • Inadequate implementation of safety procedures • Infectious disease epidemics (e.g. SARS, H1N1 virus) <p>Climate change:</p> <ul style="list-style-type: none"> • Inundation of low lying coastal and island areas • Increase in violent storms and extreme weather

9. Strategic Challenges, Rationale and Approach

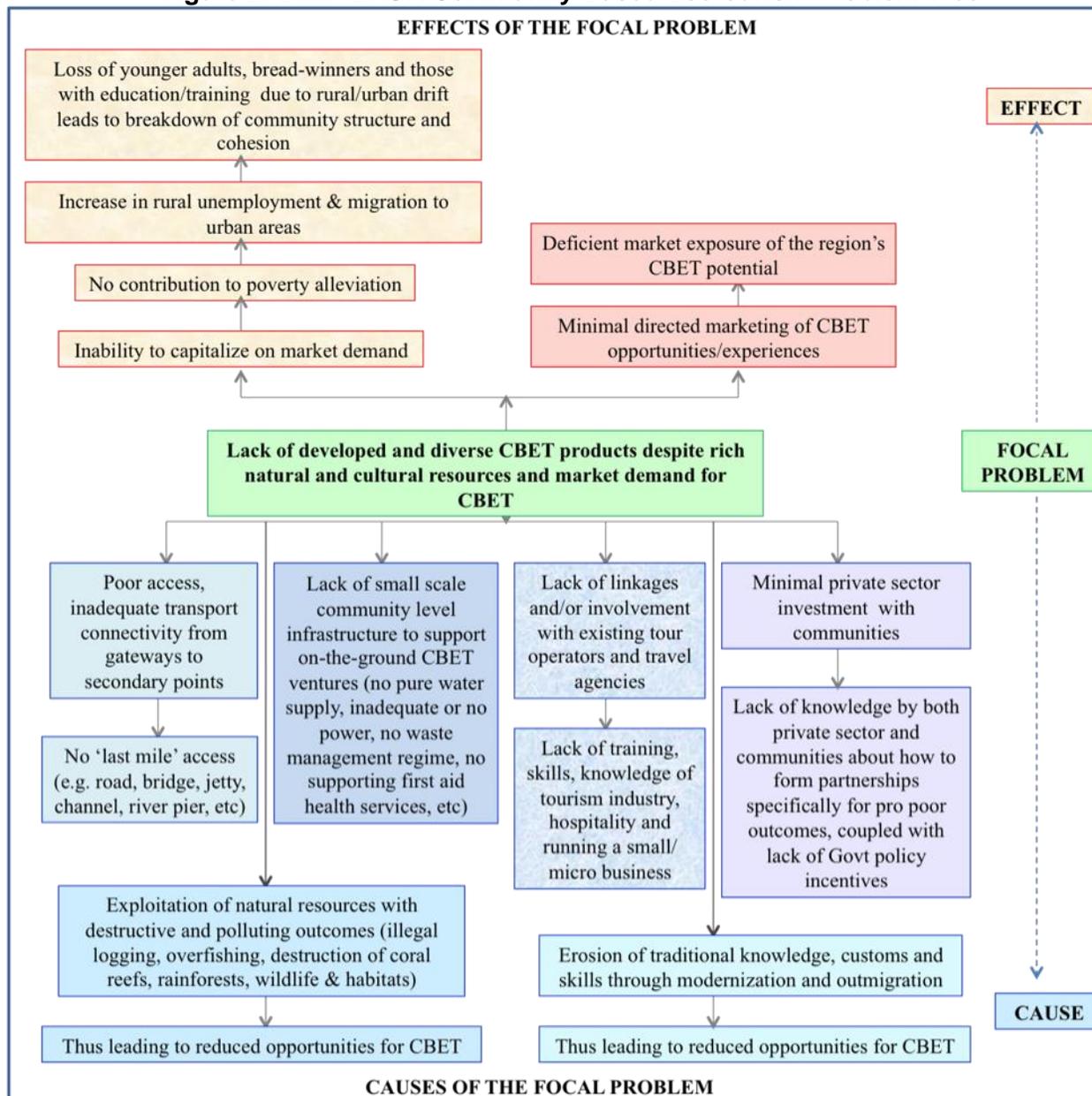
26. Overall, the strengths of the subregion are more or less offset by its weaknesses that make it difficult for it to compete successfully with emerging global destinations such as the Greater Mekong Subregion or established ecotourism destinations in Central America and Africa. Reversing the degradation of EAGAs unique natural and cultural ecotourism assets, reducing endemic poverty and promoting more inclusive economic growth are critical to the future of ecotourism in the subregion. Other pressing challenges are to reverse deforestation and unabated pollution of the marine environment, resolve ethnic and religious conflicts, and manage the impacts of climate change.

27. Strategic challenges to develop an environmentally sustainable and socially inclusive portfolio of diverse CBET products, ventures and experiences that are both responsive to market demand and protect the subregion’s natural and cultural heritage assets reflect the issues summarized in the SWOT analysis and problem tree shown in figure 2. These challenges are grouped into three interdependent sets of constraints:

- The lack of a coherent CBET destination and site development framework; inadequate transportation infrastructure and access between gateway destinations and ecotourism sites; and a lack of small-scale community level infrastructure and tourism-related services.
- Weak local capacity to prevent and mitigate natural resource exploitation with destructive and polluting outcomes; erosion of traditional knowledge, customs and skills; limited investment and participation in CBET by existing tour operators and travel agencies; limited community knowledge and business skills to operate tourism-related

micro and small enterprises; and lack of private sector/community CBET ventures and partnerships.

Figure 2: BIMP-EAGA Community-Based Ecotourism Problem Tree



- Low market awareness about the subregion's ecotourism opportunities; limited knowledge of the Equator Asia brand; lack of targeted investment promotion and limited resources for subregional marketing.

28. The rationale for adopting a concerted strategic approach to subregional CBET development is that doing so strengthens measures to protect the subregion's shared natural and cultural heritage, accelerates inclusive economic growth within and across the subregion, and facilitates harmonization of service standards and replication of best practice. Promoting the BIMP-EAGA as a single destination with world-class ecotourism will increase the viability of subregional air, sea and land linkages, stimulate demand to scale up widespread adoption of

streamlined CIQS procedures, and encourage investment in infrastructure and services that underpin value-added multi-country tour circuits.

B. THE BIMP–EAGA COMMUNITY-BASED ECOTOURISM STRATEGY

1. Vision for Community-Based Ecotourism in the Subregion

29. The Joint Tourism Development Cluster in consultation with numerous stakeholders has developed the following vision for community-based ecotourism in the subregion:

“BIMP–EAGA is a globally competitive, well-developed and connected multi-country ecotourism destination, with circuits and sites where communities are able to socio-economically benefit through participation in community-based ecotourism activities.”

30. Guided by this vision, from 2010 to 2015 subregional governments and related stakeholders will focus their efforts on developing sustainable CBET that utilizes and contributes to the conservation and protection of the subregion’s rich natural and cultural heritage. CBET will aim to achieve beneficial environmental and socio-economic outcomes for host communities and deliver highly satisfying experiences to visitors. It will be based on the principles of ecologically sustainable development, contribute to achievement of the United Nations Millennium Development Goals, mainstream responsible tourism practices¹⁰ and align and harmonize with the ASEAN Tourism Strategy and the national development policies of each EAGA government.

2. Guiding Principles

31. The BIMP–EAGA Community-Based Ecotourism Strategy is grounded in nine guiding principles that provide overall guidance to CBET stakeholders working towards its vision. Adoption of these principals into national, state, provincial and local tourism policies is an important step towards creating a more conducive environment for sustainable CBET development.

- CBET in BIMP–EAGA will be developed within a logical framework of prioritized thematic ecotourism, circuits, destinations and clusters of CBET sites with coordinated investments in infrastructure, training and capacity building and subregional marketing.
- CBET development will be approached with the understanding that it is one component of the wider “tourism system”, and promote backward and forward economic linkages with other sectors. Due recognition will be given to promoting cooperation between the public and private sectors and communities to plan and manage CBET.
- CBET will aim to improve living standards of the poor and vulnerable as defined by the national criteria of subregional governments. CBET initiatives will involve and benefit women, indigenous ethnic groups, youth and the elderly.

¹⁰ The International Conference on Responsible Tourism in Destinations issued the “Cape Town Declaration” in 2002 that defines Responsible Tourism as ‘tourism that minimizes negative economic, environmental, and social impacts; generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry; involves local people in decisions that affect their lives and life chances; makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world’s diversity; provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues; provides access for physically challenged people; and is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.’

- As part of the CBET development process, there must be broad community participation in the conception, planning, implementation, ownership and monitoring of CBET initiatives.
- Private sector participation and partnerships between the public sector, private sector and communities that promote ecologically sustainable CBET and other forms of responsible business practices which contribute to poverty reduction are encouraged, as is participation of the development partners and nongovernment organizations as “honest brokers”.
- Several development methodologies should be pursued simultaneously, including straightforward CBET development alongside value chain interventions that broaden opportunities for the poor to link into and benefit from the tourism economy.
- CBET initiatives must demonstrate that they are environmentally sustainable and include measures to effectively avoid and mitigate negative environmental and social impacts. They should include components that educate visitors and industry stakeholders about the importance of biodiversity conservation and cultural heritage protection. Local styles of architecture, local building materials and energy efficiency is encouraged.
- CBET should be consistent with the conservation and development principles of subregional, national and local conservation programs such as the Coral Triangle and Heart of Borneo. Mechanism should be developed that capture and reinvest a portion of CBET revenue into conservation activities.
- Adventure and mainstream CBET products based on marine and terrestrial wildlife, bird watching, forest trekking and cultural resources will be prioritized in order to leverage the unique selling proposition of experiencing the subregion’s globally significant biodiversity and rich indigenous cultural heritage.

3. Impact and Outcome of the Strategy

32. The overall goal of the BIMP–EAGA Road Map to Development is to narrow the development gap between and across the member EAGA countries as well as across the ASEAN-6 countries, and increase trade, investment and tourism in the subregion. In the context of the strategic challenges facing CBET development in the subregion, shared vision for CBET and guiding principles, the expected impact of the strategy is:

“Thematic multi-country community-based ecotourism circuits, destinations and sites are developed that attract high-yielding global markets, where communities in partnership with the private sector directly benefit from tourism activities that valorize and protect the subregion’s rich natural and cultural heritage.”

33. The expected outcome of the strategy is:

“Community-based ecotourism is the focus of the subregion’s tourism development approach.”

34. Progress towards the achievement of the strategy’s impact can be measured by increases in the number of tourist arrivals, tourist expenditure and length of stay, CBETs market share and tourism-related employment in the subregion. Achievement of the strategy’s outcome can be measured by assessing the extent to which the CBET strategy is incorporated into the existing

policies and plans of the subregion's national, state and provincial governments, the number of CBET sites and products developed, the number of people (and percentage of women) benefiting directly and indirectly from CBET activities, numbers of new tourism SMEs created, and the extent to which CBET ventures in the destinations have adopted and implement responsible tourism practices.

4. Targets and Indicators

35. The strategy's main impact and outcome targets and indicators are set out in table 4. Assuming that the subregion maintains its current share of ASEANs international arrivals, there will be 7.2 million international visitors in 2015 and 9.9 million by 2020. A modest seven percent compounded annual increase in EAGAs combined domestic markets suggests it will grow from 12 million in 2009 to just over 18 million by the end of 2015. With successful implementation of the strategy, the size of the international ecotourism market as a percentage of total international arrivals is forecast to double to 20%, equal to 1.44 million ecotourists that will spend \$910 million and sustain 176,390 tourism-related jobs.

Table 4: Performance Indicators: BIMP-EAGA Community-Based Ecotourism Strategy

Key Performance Indicators	Baseline 2009	2015 Target
Impact		
International arrivals to the subregion (million)	4.5	7.2
Total size of the domestic intra-EAGA tourism market (million)	12.0	18.0
Annual revenue from international tourism market (\$ billion in 2009 prices)	2.92	4.68
Size of international ecotourism market (million) ¹¹	0.45	1.44
Annual revenue from international ecotourism market (\$ million in 2009 prices) ¹²	292.5	910.0
Number of jobs created directly/indirectly by the ecotourism sector ¹³	56,700	176,390
Community/local share of CBET-related revenue and employment in the subregion. ¹⁴	<5%	~ 40%
Outcome		
Extent to which the CBET strategy is incorporated into subregional tourism policies and plans	None	All
Number of new CBET cluster sites developed ¹⁵	None	15
Number of new CBET tours developed	--	90
Number of new CBET-related SMEs created that have adopted responsible tourism practices ¹⁶	NA	300
Number of people directly involved in and benefiting from CBET through employment, income, training and improved natural resource management, of which at least 30% are women. ¹⁷	NA	37,500

C. STRATEGIC APPROACH AND PROGRAMS

¹¹ Based on estimated ecotourism market of 10%/total arrivals in 2009 increasing to 20% or arrivals

¹² Assumes that ecotourists spend the same amount per day as the average for international visitors in the subregion, estimated at \$92.85 in 2009

¹³ Based on the assumption that the ratio of direct and indirect jobs to tourism expenditure is the same as that reported in the Greater Mekong Tourism Sector Strategy Draft Final Report, 2005, p 33, i.e. one job per \$3,860 of expenditure in 2003 or \$5,159 in 2009 prices (assuming inflation at 5% per annum between 2003 and 2009)

¹⁴ Initial estimates by consultant to be verified through surveys in project design phase

¹⁵ A CBET cluster site is assumed to comprise an average of 10 villages with population of around 5,000 people

¹⁶ Assumes that for every cluster development 20 new SMEs will be created

¹⁷ Based on 15 clusters of 5,000 people of whom 50% obtain benefits as direct beneficiaries

36. Strategic directions summarized in figure 3 aim to facilitate the development of multi-country ecotourism circuits, sub-circuits and destinations that can be promoted under the “Equator Asia” brand at the subregional level and also incorporated into ASEANs broader “Southeast Asia – feel the warmth” brand. Three programs are prioritized for implementation from 2010 to 2015.

CBET Subregional Circuit, Destination and Site Development Program involving 3 components: (i) planning and adoption of a multi-country CBET circuit, destination and site development framework, (ii) provision of public infrastructure at priority CBET destinations to improve connectivity and access, protect ecotourism assets, and increase visitor comfort and safety, (iii) development of CBET-related products and services.

Community and Private Sector Support Program with 3 components: (i) community preparation, (ii) documentation of traditional knowledge and development of specialized guide training to support thematic natural and cultural heritage tours, and (iii) promotion of SMEs in the hospitality, transportation and tour operations sectors, support for tourism-related value chain interventions and mobilization of financial resources to facilitate CBET-related enterprise development with a focus on public-private-community partnerships.

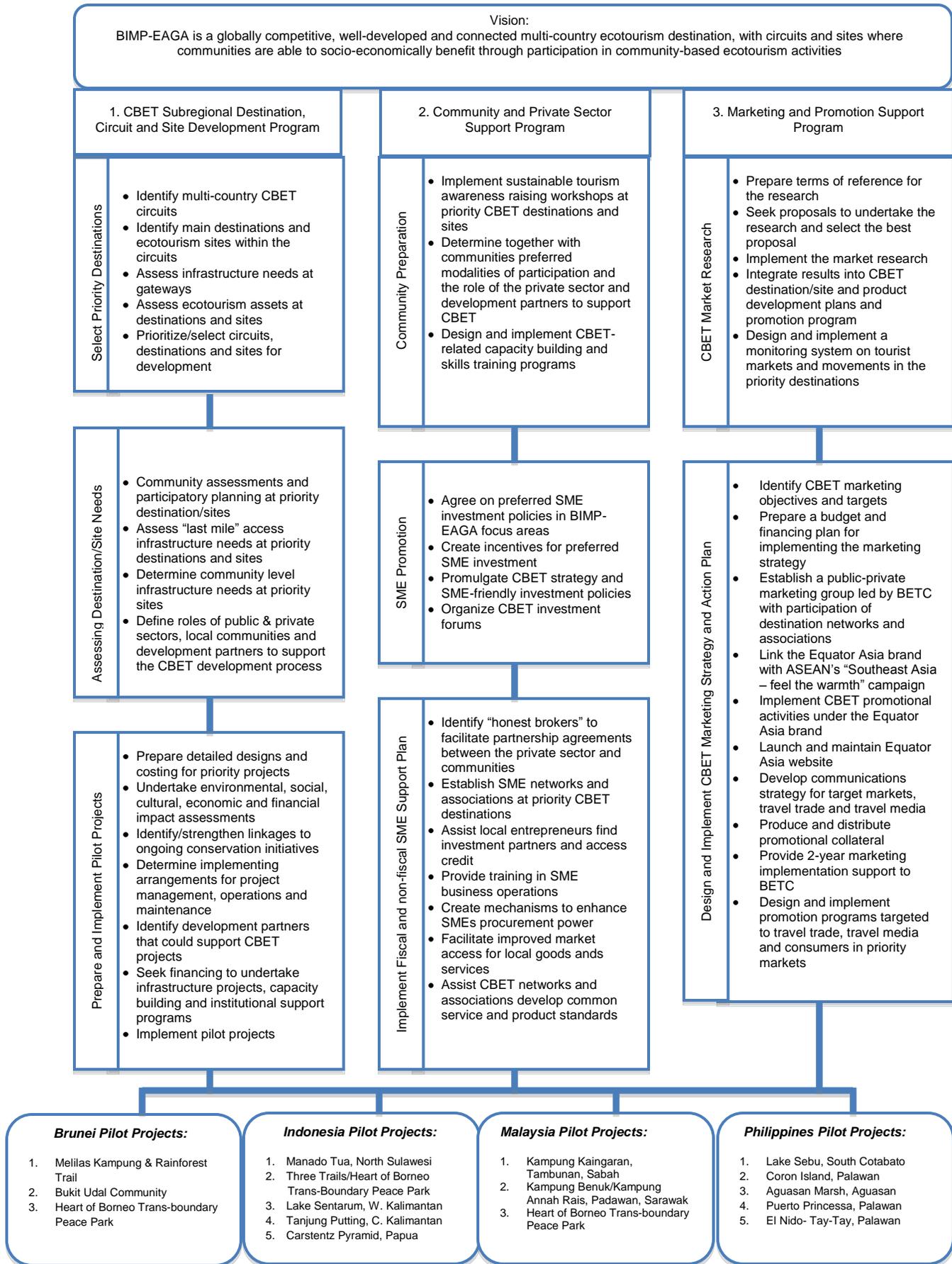
Marketing and Promotion Support Program involving 2 components: (i) international and domestic market research, and (ii) design and implementation of a CBET marketing strategy and action plan.

37. Strategic programs are both thematic and spatial in character and will be implemented initially through a series of pilot projects in each multi-country CBET circuit. They will complement existing programs that address environmental conservation, SME promotion, public health issues, travel facilitation and infrastructure development. Priority circuits proposed by the JTDC are the (i) Heart of Borneo Rainforest Wilderness Circuit (3 countries) with up to 26 CBET destinations, (ii) Mindanao-Sulawesi-Moluccas Marine Adventure Circuit (2 countries) with up to 12 destinations, (iii) Palawan-Borneo Sulu Marine and Forest Wilderness Corridor (4 countries) with up to 40 destinations including 26 in the Heart of Borneo, and (iv) Moluccas-Papua Marine and Forest Wilderness Adventure sub-circuit linked by air either to the Heart of Borneo and/or the Mindanao-Sulawesi-Moluccas circuit. At least 90 new CBET destinations/tours will be developed within these circuits by 2015.

38. Specific examples of CBET products and services to be promoted within the main subregional circuits and conservation areas identified¹⁸ are snorkeling and diving, trekking, sailing, cruising, water sports, climbing, volunteer tourism, marine and terrestrial wildlife viewing, bird watching, visits to island communities, and sightseeing. The BETC plans to develop an Equator Asia Yacht Rally/Cruise that includes the four EAGA countries. There is a modest potential to develop marine-based CBET products and services linked to the circuit.

¹⁸ Coral Triangle, Heart of Borneo, various UNESCO World Heritage Sites

Figure 3: Strategic Directions 2010 – 2015



39. A summary of the objectives, scope, expected outputs and implementing arrangements of the strategic programs is in table 5.

Table 5: Summary of Strategic Programs

Immediate Objectives	Program Scope	Expected Program Outcome/Outputs	Implementing Arrangements
Strategic Program 1: CBET Subregional Destination, Circuit and Site Development Program			
Component 1.1 Tourism infrastructure development			
<p>To ensure key access infrastructure is in place to facilitate travel to and within the subregion and install “last mile” and basic community infrastructure that allows communities to capture CBETs economic opportunities.</p>	<ul style="list-style-type: none"> • Identify priority infrastructure, including roads, coastal and river facilities, pure water supply, sanitation and other supporting facilities. • Technical assistance for participatory planning and a feasibility study of each priority project. • Social and environmental impact studies and social impact monitoring. • Investment in large public infrastructure and small-scale community infrastructure. 	<p>Convenient access to CBET destinations and sites that creates income generating and employment opportunities for the poor.</p> <p>The main outputs of the program will include CBET development plans and construction of priority infrastructure.</p>	<ul style="list-style-type: none"> • Each country will create a Program Coordination Unit (PCU) to monitor and supervise the implementation of the program and sub-projects. • Each participating country/state/focal area will establish one or more Project Implementation Units (PIU) that will undertake the day-to-day supervision and implementation of priority projects. • Each country will report project progress to the BIMP-EAGA Facilitation Centre which will report to and coordinate with the Joint Tourism Development Cluster, Ministers and Senior Officials.
Component 1.2: Marine and terrestrial CBET product development			
1.2.1: Develop community-based marine ecotourism products within thematic multi-country circuits			
<p>Within the framework of the Coral Triangle conservation initiative, support the creation of additional economic opportunities through the development of community based marine ecotourism products.</p>	<ul style="list-style-type: none"> • Work collaboratively with The Nature Conservancy, WWF and other agencies to identify priority intervention areas. • Create an enabling environment that encourages participatory planning and product development by communities in association with the private sector and NGOs. • Focus on the utilization of marine resources without creating adverse impacts. • Provide basic infrastructure, especially ‘last mile access’ facilities such as jetties. • Raise quality standards in home-stay lodging, hygiene and waste management. • Engage local and international tour operators to 	<p>Improved conservation practices and poverty reduction in areas with CBET.</p> <p>The main outputs of the program are training and capacity building to facilitate establishment of CBET ventures, facilities, and supporting infrastructure development.</p>	<p>As above.</p>

Immediate Objectives	Program Scope	Expected Program Outcome/Outputs	Implementing Arrangements
	develop and market marine nature, culture, and adventure tour products.		
1.2.2: Develop community-based forest landscape and culture-based CBET products in the Heart of Borneo and Papua			
Within the framework of the Heart of Borneo (HoB) forest conservation initiative, and those in Papua, support the creation of additional economic opportunities through the development of community based forest landscape and culture-based ecotourism products.	<ul style="list-style-type: none"> • Collaboration between the national and provincial government authorities, especially the forestry departments and other agencies that have already established programs in the HoB and Papua areas to identify specific areas for intervention. • Relevant agencies create an enabling environment for the establishment of a HoB Trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre. • Focus on the development of sustainable ecotourism ventures with minimum impacts. • Provide basic infrastructure such as feeder roads and trails. • Provide supporting facilities and training for communities on home-stay management, hygiene and waste management. • Engage local and international tour operators to develop and market the Heart of Borneo and Papua as a major component of the 'Equator Asia' brand. 	<p>Improved conservation practices and poverty reduction in HoB and Papua.</p> <p>Outputs are establishment of a Trans-boundary Peace Park, CBET infrastructure, and training and capacity building that supports CBET ventures and facilities.</p>	<ul style="list-style-type: none"> • PCUs and PIUs are established in each country/site as above. • The JTDC will seek EAGA Leaders endorsement for the Trans-boundary Peace Park and facilitate establishment of a special Heart of Borneo CBET Task Force. The Task Force will work with relevant stakeholders to formulate a Memorandum of Understanding (MoU) to establish the Park within the HoB. • Support for and endorsement of the Trans-boundary Peace Park should be sought from the United Nations Environment Programme (UNEP) and the International Institute for Peace Through Tourism (IIPTT). • An invitation to the official opening could be extended from HoB countries to the patron of the IIPTT, Her Majesty the Queen of Jordan which would provide global media exposure for the initiative as well as reinforce international Islamic ties with the countries concerned.
1.2.3: Develop community-based ecotourism focusing on wildlife at multi-country circuits, destinations and sites			
To develop appropriate forms of wildlife tourism that will bring a range of benefits to impoverished communities.	<p>Geographically, this covers all areas included in multi-country circuits, destination and sites and focuses on activities related to:</p> <ul style="list-style-type: none"> • Wildlife-watching, both terrestrial and marine. • Sanctuary based semi free-wildlife tourism • Fishing tourism e.g. sports fishing at coastal areas, islands and inland lakes. 	<p>Improved conservation practices and poverty reduction in areas with CBET.</p> <ul style="list-style-type: none"> • New CBET ventures developed based on terrestrial and marine wildlife viewing and bird watching. • Many new community managed trails established. 	<ul style="list-style-type: none"> • PCUs and PIUs are established in each country/site as above.

Immediate Objectives	Program Scope	Expected Program Outcome/Outputs	Implementing Arrangements
	These opportunities could be combined with trekking, camping, wildlife photography, canoeing and kayaking, adventure tourism, caving, etc.	<ul style="list-style-type: none"> • Access and small-scale site infrastructure provided to support ecotourism activities. • Small community based visitor information centres provided. • New guiding and hospitality skills mastered by community members. 	
Strategic Program 2: Community and private sector CBET support program			
Component 2.1: Documenting traditional knowledge, interpretation and guiding			
To ensure that visitors to a CBET venture gain maximum satisfaction from the experience through interaction with well prepared communities and local guides that have been trained to interpret traditional and scientific knowledge about natural and cultural heritage.	<p>Participatory consultations with target communities will explore and record aspects of traditional knowledge that may be incorporated into tour programs, as well as how to structure village visits.</p> <ul style="list-style-type: none"> • Train trainers/facilitators to conduct site specific sustainable tourism awareness seminars. • Communities nominate local guides for specialized heritage training and appropriate language training courses. • Traditional knowledge and conventional scientific disciplines will serve as a basis for interpretation through story telling and experiential learning to enhance visitors understanding of ecology, anthropology, geology, traditional medicine and local cultural beliefs and practices. 	<p>Increased understanding of sustainable tourism principles and improved interpretation of natural and cultural heritage in target areas.</p> <ul style="list-style-type: none"> • Sustainable tourism seminars implemented in all participating communities. • 20 guide training courses will train 400 guides and community trainers. Training programs will teach techniques to interpret traditional and scientific knowledge. • Infrastructure for exhibiting and interpreting local knowledge and natural heritage (i.e. visitor centers, signage) is professionally maintained. 	<p>Establishment of PCU/PIUs as above</p> <p>Technical assistance will be required to ensure that the two disciplines are combined in a professional way so that tour programs effectively increase visitor understanding of tangible and intangible heritage.</p> <ul style="list-style-type: none"> • A team of specialist educators with experience in traditional knowledge and community based guide training will be appointed with responsibility for organizing short courses (3-4 weeks) as new CBET ventures are developed. Training will involve train-the-trainer courses for locals who would in turn train community members as guides. • Where possible, language institutes located in the BIMP-EAGA countries should be utilized for long term language training to build capacity and continuity in the delivery of such training.
Component 2.2: Facilitating private sector CBET investment, SME/MSME promotion and partnerships			
To promote different types of profitable business models and	<ul style="list-style-type: none"> • Undertake value chain analysis to identify private sector and community partnership business 	An enabling environment for CBET development is established that raises income levels and	<p>Establishment of PCU/PIUs as above</p> <ul style="list-style-type: none"> • Employ two or three expert

Immediate Objectives	Program Scope	Expected Program Outcome/Outputs	Implementing Arrangements
<p>partnerships among the private sector, communities and other stakeholders that deliver poverty reduction benefits and positive conservation outcomes.</p>	<p>opportunities.</p> <ul style="list-style-type: none"> • Assist companies already working with communities to analyse their current operations with a view to achieving more targeted and greater poverty alleviation outcomes. • Conduct an outreach campaign to identify private sector operators and entrepreneurs in the subregion that are interested in achieving triple bottom line outcomes, and facilitate their engagement with communities to launch new ventures. • Implement pro-poor tourism pilot projects to demonstrate how the private sector can make a greater contribution to the Millennium Development Goals. • Enhance SME supply chains in the tourism and other sectors to broaden poverty reduction benefits. • Develop frameworks for legal partnerships between local people and investors to share equity and generate favourable financial returns on their natural and cultural assets. 	<p>standards of living in participating communities.</p> <ul style="list-style-type: none"> • At least 50 companies are working with communities in ways that demonstrate mutual benefits and corporate social responsibility. • Increased business opportunities and client base for companies that practice corporate social responsibility. 	<p>facilitators over the first 5 years with a budget for subregional travel and workshops.</p> <ul style="list-style-type: none"> • The BIMP-EAGA Facilitation Centre may wish to contact the United Kingdom's Overseas Development Institute to seek advice and assistance to implement this program.
Strategic Program 3: Marketing and promotion support program			
Component 1: Market research and design of a 5-year subregional CBET marketing strategy and action plan			
<p>To prepare a plan for the financing, implementation, monitoring and evaluation of a highly effective subregional CBET marketing strategy and action plan.</p>	<ul style="list-style-type: none"> • Market research to develop promotional strategies, action plans and targets consistent with CBET products available. • Design 5-year marketing strategy and annual action plans aligned with the JTDCs existing joint tourism marketing program. • Design web-based marketing and distribution applications and collateral materials targeting consumers, the travel trade and travel media. • Develop a financing scheme for the CBET marketing 	<p>Improved understanding of the intra-regional and long haul CBET and mainstream tourist markets.</p> <ul style="list-style-type: none"> • Five-year marketing strategy and rolling annual marketing and promotion program. • Financing plan and recommendations for a public-private partnership to implement joint tourism marketing programs. 	<p>A marketing services firm with experience in undertaking tourism market research in global markets and preparing and implementing marketing strategies and action plans should be commissioned to:</p> <ul style="list-style-type: none"> • Undertake the market research • Design the 5-year strategy and action plan. • Develop proposals for financing the strategy and action plan. • Make detailed recommendations for a

Immediate Objectives	Program Scope	Expected Program Outcome/Outputs	Implementing Arrangements
	program. <ul style="list-style-type: none"> • Facilitate public-private partnerships to implement marketing programs. 		public-private institutional arrangement and implementation to be discussed and agreed by the JTDC and BETC.
Component 2: Implementation of the 5-year subregional CBET marketing strategy and annual action plans			
To market and promote the thematic multi-country circuits and CBET investment opportunities.	<ul style="list-style-type: none"> • Deployment of appropriate support systems including web-based marketing. • Production and distribution of collateral materials for use by consumers, the travel trade and travel media. • Conduct signature events • Monitoring and evaluation of results against baseline targets. 	Increased knowledge of the subregion's CBET portfolio among tour agents and consumers in priority markets that increases arrivals to and within the subregion. Increased investment in CBET by local and international investors. <ul style="list-style-type: none"> • Appropriate multi-media promotional materials to complement the 'Equator Asia' and ASEANs 'Southeast Asia - feel the warmth' campaigns. 	A marketing specialist with experience in devising imagery and appropriately sensitive 'messages' concerning communities and tourism would be contracted to assist the marketing divisions of the NTOs to formulate appropriate multi-media promotional material for the diverse CBET products in their countries/provinces. At an appropriate time the JTDC may consider establishing a CBET marketing coordinator position (under the BETC) that is based in the BIMP EAGA Facilitation Center. The position would be funded by contributions from the BIMP-EAGA countries as well as development partners and the private sector.

D. IMPLEMENTATION PLAN

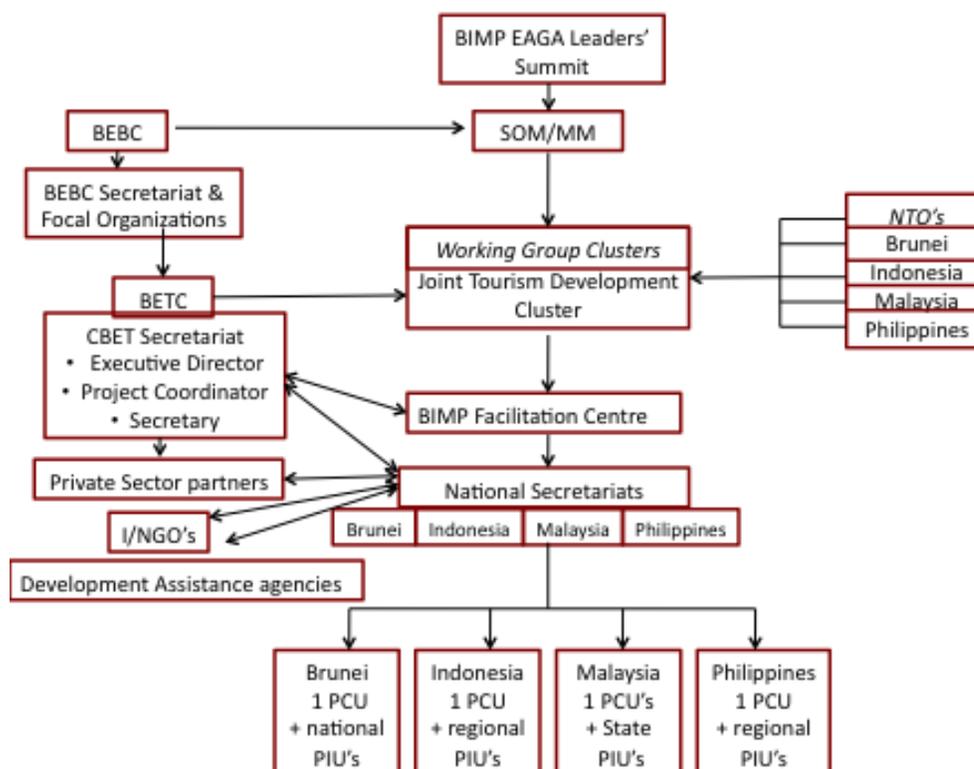
1. Institutional Arrangements

40. National Secretariats comprised of NTO staff and/or staff of other agencies deemed appropriate by EAGA governments will serve as Program Coordinating Units (PCUs) for the various subregional and national CBET initiatives. Project Implementation Units (PIUs) will be established in line government agencies at the state and local level to take the lead on the day-to-day implementation and management of projects. PIUs will contract experts and consultants to build local capacity and support government and private sector counterparts as needed. PCU and PIU managers will meet at least at least once per year together with JTDC and other sector-specific cluster meetings. To enhance coordination and promote investments in CBET and related sectors, private sector leaders associated with the BEBC and BETC will be invited to attend cluster meetings. The budget to finance the proposed implementing arrangements will be sourced from project loans and grants as well as regular government budgets.

41. Based on an analysis of the capacities of the various existing subregional institutions and their current mandates, particularly the BIMP-EAGA Tourism Council (BETC), it is proposed a small and dedicated BETC Secretariat is established within the BIMP-EAGA

Facilitation Center to coordinate implementation of the CBET strategy with National Secretariats and BETC members, private sector partners, NGOs, and development partners. The BETC Secretariat will be responsible for the overall coordination of the strategy's implementation, including the coordination of subregional marketing programs and dissemination of progress reports, lessons learned and business opportunities. The official BIMP–EAGA website¹⁹ may be utilized to publicize this information or a dedicated site could be developed and maintained by the BETC Secretariat. Figure 4 illustrates the proposed organizational arrangements to implement the strategy.

Figure 4: Implementing arrangements: BIMP–EAGA community-based ecotourism strategy



2. Action Plan for Priority Projects

42. Strategic projects for implementation from 2011 - 2015 are listed in Appendix 1. Preliminary cost estimates for the 9 projects is \$63.2 million. Mobilization of resources to conduct pre-feasibility studies and agreement on detailed arrangements to finance and implement priority projects will take place during 2010 and 2011. Five CBET destinations have been prioritized by the JTDC for immediate implementation because of their typicality, ease of accessibility for pre-feasibility evaluation and utility as CBET demonstration models. They include (i) Melilas Kampung and Rainforest Trail in Brunei, (ii) Manado Tua, in North Sulawesi, Indonesia (iii) Kampung Kaingaran, Tambunan, in Sabah, Malaysia (iv) Kampung Benuk, and Kampung Annah Rais, Padawan, in Sarawak, Malaysia and (v) Coron Island, Palawan and

¹⁹ www.bimp-eaga.org

Lake Sebu, in South Cotabato, Mindanao, Philippines. Some concern has been raised about security in the Lake Sebu area therefore Philippines may opt to select an alternative pilot site.

Table 6: Priority community-based ecotourism projects in the BIMP–EAGA subregion

Brunei Darussalam	Indonesia	Malaysia	Philippines
<ul style="list-style-type: none"> • Melilas Kampung and Rainforest Trail • Bukit Udal Community • Bruenei component of the proposed HoB Trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre 	<ul style="list-style-type: none"> • Three trails to Heart of Borneo's Lake Sentarum, West Kalimantan • Lake Sentarum, West Kalimantan • Tanjung Putting, Central Kalimantan • The Kalimantan component of the proposed HoB Trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre • Manado Tua, North Sulawesi • Carstentz Pyramid, Lorenz National Park 	<ul style="list-style-type: none"> • Kampung Kaingaran, Tambunan, Sabah • Kampung Benuk, and Kampung Annah Rais, Padawan, Sarawak • The Kalimantan component of the proposed HoB Trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre 	<ul style="list-style-type: none"> • Lake Sebu, South Cotabato, Mindanao • Samal Island, Davao Gulf • Aguasan Marsh, Aguasan • Initao, Camiguin, Northern Mindanao • Del Carmen Wetlands, Surigao Island • Pujada Bay, Davao Oriental • Sarangani, Southern Mindanao • Duka Reef, Misamis Oriental • Coron Island, Palawan • San Vicente-El Nido-Tay Tay, Palawan • Puerto Princess and Tubataha Reef Area

E. RESULTS MONITORING

43. The strategy's monitoring framework is shown in Appendix 2. Progress towards achieving the strategy's impact, outcome and outputs will be monitored at the subregional and national levels on an ongoing basis. Data will be disaggregated by gender and ethnicity before being consolidated into annual reports delivered by the BETC Secretariat and other stakeholders at JTDC and SOMM meetings. Detailed baseline data on CBETs market share, number of CBET ventures, benefits flowing to communities, and the adoption of responsible tourism practices is currently not available and will be obtained during feasibility studies.

44. Notwithstanding the lack detailed baseline data, the strategy is targeting 7.2 million international arrivals and total subregional tourism revenue of \$4.68 billion in 2015. The number of international ecotourists vacationing in the subregion is expected to rise to 1.44 million, with this market segment generating \$910 million that would sustain about 176,000 direct and indirect jobs. Data sources to monitor these and other impact targets include customs and immigration reports, tourist exit surveys, airline statistics, and other statistical reports issued by government and industry.

45. The strategy's outcome will be measured by determining the extent to which the CBET strategy is mainstreamed into subregional, national and local policies and plans. Mainstreaming the strategy into tourism development policy will create an enabling environment that by 2015 is

expected to lead to the creation of at least 300 new CBET-related SMEs and destination development at 15 sites that will raise 15,000 households above the poverty level and benefit 37,500 people, of which at least 30% will be women. Data sources to monitor progress towards achieving these outcome targets are BETC Secretariat annual reports and minutes of JTDC meetings, reviews of subregional, national, state and local tourism policies and plans and government statistics and reports.

46. Outputs linked to priority projects will be monitored by PIUs and PCUs, which will produce baseline reports then perform ongoing monitoring as appropriate. PIU and PCU annual reports will be summarized and passed on the BETC Secretariat for reporting at annual JTDC meetings. Indicators for the CBET destination, circuit and site development program will include, for example, the number and length of roads built, number and distance of trails constructed, number of water supply and sanitation facilities built, number of information centers, jetties, bridges, and number of people trained in the operation and maintenance of these facilities.

47. Community and private sector support program indicators include the number of CBET ventures established, guides trained, number of CBET partnership agreements involving the private sector, number of institutions providing CBET-related training and number of people trained, awareness seminars conducted, and number of CBET ventures.

48. Marketing support program outputs are CBET market research reports, a subregional CBET marketing strategy and action plan, number and type of promotional materials distributed and signature events staged. Specific targets for the marketing program will be developed as part of the proposed market research.

49. In addition to PCU and PIU reports, outputs will be monitored by reviewing government and nongovernment organization's reports, statistical reports, tourist and community surveys, interviews with training institutions, communities and private sector associations.

STRATEGIC PROJECTS FOR IMPLEMENTATION 2010 – 2015

Project Name	Project Description	Participating Countries	Estimated Cost	Lead Country
Strategic Program 1: CBET Subregional Destination, Circuit and Site Development Program				
Project 1.1: Tourism infrastructure development				
Brunei:	One project comprising one package that will provide: (a) CBET destination and site analysis, (b) sealed car park for 2 buses and 20 cars and improvement to river landing with public toilets and rain shelter, and (c) small-scale community infrastructure at the two priority areas of (i) Melilas Kampung and Rainforest Trail and (ii) Bukit Udal Community.	Brunei	\$300,000	Brunei
Indonesia:	One project comprising 5 packages each involving: (a) CBET destination and site analysis, (b) last-mile access and related facilities such as parking, shelter, jetties, and public toilets, and (c) small-scale community-based infrastructure in (i) Three Trails to Heart of Borneo Kayan Mentarang National Park (assuming 10 core village out of 57 villages), to Betung Kerihun National Park (assuming 3 core villages out of 11 villages), and the Sangkulirang Limestone Forest Nature Reserve (assuming 15 core villages out of 176 villages), (ii) Lake Sentarum, West Kalimantan (assuming 5 villages), (iii) Tanjung Putting, Central Kalimantan (assuming 5 villages), (iv) Manado Tua area (3 villages), in North Sulawesi, and (v) the Carstentz Pyramid (assuming 5 villages), in Lorenz National Park, Papua.	Indonesia	\$18,800,000	Indonesia
Malaysia	One project comprising two packages: Package 1: (a) CBET destination and site analysis, (b) 10 km 4-wheel drive trail, last-mile access improvement and related facilities such as parking, shelter, and public toilets, and (c) small-scale community-based infrastructure improvements at Kampung Kaingaran, Tambunan, Sabah Package 2: (a) CBET destination and site analysis, (b) parking, shelter, and public toilets, and (c) small-scale community-based infrastructure improvements at Kampung Annah Rais and Kampung Benuk.	Sabah, Malaysia Sarawak, Malaysia	\$300,000 \$350,000	Malaysia
Philippines	One project comprising two packages: Package 1: (a) CBET destination and site analysis, (b) last-mile access improvement (around 50 km) and related facilities such as parking, jetties, shelter, and public toilets, and (c) small-scale community-based infrastructure improvements in up to 15 villages on Coron Island, Northern Palawan Package 2: (a) CBET destination and site analysis, (b) last-mile access	Palawan Province, Philippines	\$9,500,000	Philippines

	improvement (around 15 km) and related facilities such parking, shelter, and public toilets, and (c) small-scale community-based infrastructure improvements at up to 10 villages at Lake Sebu T'Boli ethnic groups in South Cotabato, Mindanao	South Cotabato Province, Mindanao, Philippines	\$4,500,000	
Project 1.2: Marine and terrestrial CBET product development				
Brunei:	One project comprising two packages: Package 1: (a) community preparation and training, (b) development of a CBET adventure trail (~20 km) with adventure activity points, suspension bridges and other CBET facilities and structures at the two priority areas of (i) Melilas Kampung and Rainforest Trail and (ii) Bukit Udal Community	Brunei	\$500,000	Brunei
	Package 2: (a) community preparation and training and (b) development of 25 km interpreted trail and interpretation centre to link to the Brunei component of the proposed HoB trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre.	Brunei, Indonesia, and Malaysia	\$250,000	
Indonesia:	One project comprising two packages: Package 1: Five CBET product development interventions at 46 sites each including: (a) community preparation and training, (b) development of interpreted forest trails (~30 km) or marine trail developments (~ 1,000 m), (c) small-scale community-based infrastructure at (i) Three Trails to Heart of Borneo Kayan Mentarang National Park, to Betung Kerihun National Park, and the Sangkulirang Limestone Forest Nature Reserve, (ii) Lake Sentarum, West Kalimantan, (iii) Tanjung Putting, Central Kalimantan, (iv) Manado Tua area, in North Sulawesi, and (v) the Carstentz Pyramid, in Lorenz National Park, Papua.	Indonesia	\$11,500,000	Indonesia
	Package 2: One intervention comprising (a) community preparation and training and (b) development of 25 km interpreted trail and interpretation centre to link the Kalimantan component of the proposed HoB trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre.	Brunei, Indonesia, and Malaysia	\$250,000	
Malaysia:	One project comprising three packages: Package 1: (a) community preparation and training, (b) development of interpreted forest trails (~30 km), (c) small-scale community-based infrastructure at Kampung Kaingaran, Tambunan, Sabah	Sabah, Malaysia	\$300,000	Malaysia
	Package 2: (a) community preparation and training, (b) development of interpreted forest trails (~30 km), (c) small-scale community-based infrastructure at Kampung Annah Rais and Kampung Benuk CBET Destination.	Sarawak, Malaysia	\$600,000	
		Sabah and Sarawak,	\$250,000	

	Package 3: (a) community preparation and training and (b) development of 25 km interpreted trail and interpretation centre to link the Malaysia component of the proposed HoB trans-boundary Forest Biodiversity Peace Park and Trilateral Interpretation Centre.	Malaysia		
Philippines:	One project comprising two packages: Package 1: (a) community preparation and training, (b) development of interpreted trails (~30 km) and marine trail developments (~ 1,000 m), (c) small-scale community-based infrastructure at up to 15 villages on Coron Island in Northern Palawan Package 2: (a) community preparation and training, (b) development of interpreted forest trails (~30 km), (c) small-scale community-based infrastructure at up to 10 villages at Lake Sebu T'Boli ethnic groups in South Cotabato, Mindanao.	Palawan Province, Philippines South Cotabato Province, Mindanao, Philippines	\$4,500,000 \$3,000,000	Philippines
Project 1.3: Training and capacity building				
	One package for each country focusing on training and capacity building to enhance CBET operations and maintenance. Project components include (a) tourism infrastructure planning and development, (b) infrastructure project management and administration skills and capacities, and, (c) infrastructure operations and maintenance capacities	All	\$75,000 per country or \$300,000	All
Strategic Program 2: Community and Private Sector CBET Support Program				
Project 2.1: Documenting traditional knowledge and specialist guide training in each country and CBET focal area				
	One project with 4 country packages comprising the following elements: (a) documentation of traditional knowledge of local communities and scientific assessment of natural and cultural heritage assets of the destination and site, (b) developing interpretative materials and training curriculum for local guides, (c) identify and strengthen training institutions in the subregion's focus areas to undertake curriculum development, training of trainers, and local guides, and (d) develop a monitoring and evaluation system to measure results.	All	\$400,000	Malaysia
Project 2.2: Facilitating private sector participation, SME/MSME development and CBET partnerships				
	One project with 4 country packages comprising the following elements: (a) inventory and outreach to interested private sector operators and entrepreneurs interested in triple-bottom-line outcomes, (b) linking interested private sector partners with community counterparts at priority CBET destinations, (c) legal advocacy and support for private sector/community partnerships and contract agreements, (d) fiscal and non-fiscal incentives for CBET-related SMEs/MSMEs, and (e) monitoring and evaluation system to measure results.	All	\$600,000	Malaysia
Project 2.3: CBET training and capacity building				
	One project with four country packages that will enhance stakeholders capacity to	All	\$75,000 per	All

	(a) undertake CBET-related training needs analysis institutional capacity assessments, (b) design training and capacity building interventions for master trainers/facilitators, (c) conduct community awareness seminars and preparatory activities, and (d) train master trainers and facilitators		country or \$300,000	
Strategic Program 3: Marketing and Promotion Support Program				
Project 3.1: Market research and development of a subregional marketing strategy and action plan				
	One project with one package comprising the following elements: (a) market research, (b) design of 5-year CBET marketing strategy and action plan, (c) identification of finance mechanisms to implement the strategy, and (d) gain stakeholder agreement on implementing arrangements.	All	\$250,000	Philippines
Project 3.2: Implementation the subregional CBET marketing strategy and action plan				
	One project with one package comprising: (a) consumer promotions (events and web-based), (b) trade promotion (familiarizations and trade fairs, and (c) travel media promotion (events, familiarizations and public relations) on an annual basis over 5 years in ASEAN, East Asia, Europe, and North America.	All	\$1,600,000/yr x 4 = \$2,400,000	BETC/Countries
Project 3.3: Marketing and promotion training and capacity building				
	One project with four country packages for training and capacity building to enhance skills and capacities of public and private stakeholders to (a) design and implement market research, (b) prepare marketing strategies and one-year promotion programs and budgets, and (c) implement and monitor results-orientated marketing programs and promotion plans	All	\$75,000 per country or \$300,000	All

BIMP–EAGA COMMUNITY BASED ECOTOURISM STRATEGY MONITORING FRAMEWORK

Design Summary	Performance Targets/Indicators	Data Sources/Reporting Mechanisms
<p>Impact</p> <p>Thematic multi-country community-based ecotourism circuits, destinations and sites are developed that attract high-yielding global markets, where communities in partnership with the private sector directly benefit from tourism activities that valorize and enhance the protection of the subregion's rich natural and cultural heritage.</p>	<p>Increase in subregional tourist arrivals, expenditure and tourism-related employment</p> <p>By 2015:</p> <ul style="list-style-type: none"> • 7.2 million international arrivals of which 1.44 million participate in community-based ecotourism during their stay. • 18 million domestic arrivals in EAGA focal areas. • \$4.68 billion in international tourist expenditure of which \$910 million is generated by ecotourism. • 176,000 ecotourism-related jobs sustained • 15,000 households are raised above the poverty line. • 37,500 people participate in and benefit directly from CBET of which at least 30% are women. 	<ul style="list-style-type: none"> • Annual visitor surveys • Tourist exit surveys • Customs and immigration annual reports • Airline statistics • Government statistics and reports • Academic studies and reports by nongovernment organizations
<p>Outcome</p> <p>Community-based ecotourism is the focus of the subregion's tourism development approach.</p>	<p>By 2015:</p> <ul style="list-style-type: none"> • The BIMP-EAGA CBET Strategy is mainstreamed into all subregional, national, state and local tourism plans and policies. • Tourism investment in the 4 thematic multi-country CBET circuits is promoted by the EAGA governments and private sector. • At least 15 new CBET destinations are developed. • 300 new CBET-related SMEs created. • Measures are in place to ensure tourism contributes to cultural and natural heritage protection and gender equality 	<ul style="list-style-type: none"> • Review of subregional, national, state and local tourism and investment policies • BETC Secretariat annual reports and minutes of JTDC meetings • Government reports and statistics • Review of tourism and heritage management policies
<p>Outputs</p> <p>1. Gateway access to multi-country thematic CBET circuits and destinations is improved.</p>	<ul style="list-style-type: none"> • International air, road and sea transportation connections are established to facilitate travel between the main gateways of each multi-country circuit. • Domestic air, road and sea connections are established between the main 	<ul style="list-style-type: none"> • Review of air, sea and road carrier schedules • Review of subregional vacation packages • Public sector reports on air, sea and road infrastructure

	<p>gateways in each country and 15 CBET destinations.</p> <ul style="list-style-type: none"> Increases in the number and length of feeder roads, airports, water supply and sanitation, jetties and river piers at priority destinations. 	<p>projects</p> <ul style="list-style-type: none"> BETC Secretariat annual reports. Minutes of JTDC meetings
<p>2. Last-mile access and small scale infrastructure facilitates installed in priority CBET destinations and sites in the country segments subregional CBET circuits developed.</p>	<ul style="list-style-type: none"> Number of information centers, trails, small ports, channels, small-bridges, water supply and sanitation, purpose built CBET facilities 	<ul style="list-style-type: none"> PIU/PCU reports Field surveys and interviews with communities BETC Secretariat annual reports. Minutes of JTDC meetings.
<p>3. CBET tours operational in priority CBET destinations and sites within the country segments of subregional CBET circuits.</p>	<ul style="list-style-type: none"> 90 new marine and terrestrial CBET activities/tours developed, focusing on the Coral Triangle and Heart of Borneo 10,000 people trained in CBET related professions, e.g. hospitality, guiding, handicraft production, scuba diving masters certificate, etc., of which at least 30% will be women. 	<ul style="list-style-type: none"> PCU/PIU reports Survey of tour operators Survey of training institutions, NGOs and government agencies Community surveys BETC Secretariat annual reports. Minutes of JTDC meetings
<p>4. Subregional cultural/natural heritage specialist guide training curriculum is created and training implemented.</p>	<ul style="list-style-type: none"> Database of traditional and scientific knowledge of natural and cultural heritage created. Heritage specialist guide training curriculum and training program established 15 specialist guide training courses implemented 500 specialist guides drawn from CBET communities are trained and 50 specialist tour packages available, i.e. ecology, biology, archaeology, geology, ethnic cultural traditions 50% increase in visitor satisfaction rates (for excursions/tours) against 2010 baseline 	<ul style="list-style-type: none"> Report on ethnographic and natural heritage database Review of curriculum and training course/reports Visitor surveys Survey of tour operators BETC Secretariat annual reports. Minutes of JTDC meetings
<p>5. Private sector participation in the development, operation and marketing of CBET products in partnership with communities is enhanced.</p>	<ul style="list-style-type: none"> Pilot partnership models are developed in each country/ focal area 90 CBET public-private-community partnership agreements in place At least 50 subregional tour operators offer CBET tours Framework and investor kits to facilitate legal partnerships between private 	<ul style="list-style-type: none"> Review of partnership agreements Survey of tour operators and communities Review of investment kits Review of investment policies

	sector and local communities available in each EAGA focal area <ul style="list-style-type: none"> • CBET SME/MSME support program in place in each focal area 	
6. Subregional CBET marketing and promotion is strengthened	<ul style="list-style-type: none"> • Awareness of “Equator Asia” brand increased among consumers and industry stakeholders by 200% against 2010 baseline • Media exposure of “Equator Asia” brand up fourfold by 2015 • 10 types of promotional media produced and at least 300,000 items distributed • Financial resources are in place to implement the plan 	<ul style="list-style-type: none"> • Visitor surveys • Immigration statistics • Review of media reports • Industry surveys • NTO reports • BETC Secretariat annual reports. Minutes of JTDC meetings

BETC = BIMP-EAGA Tourism Council; CBET = community-based ecotourism; JTDC = BIMP-EAGA Joint Tourism Development Cluster; NGO = Nongovernment Organization; NTO = National Tourism Organization; MSME = Micro, Small and Medium Enterprise