

**GREATER MEKONG SUBREGION
TOURISM SECTOR STRATEGY MIDTERM REVIEW
&
ROAD MAP 2011-2015**

Summary Report

ENDORSED BY THE

3RD GMS NTOS MEETING

Sunday 16 January 2011, Time: 10h30 – 12h00

Sofitel Phnom Penh Phokeethra Hotel

3RD MEETING OF GMS TOURISM MINISTERS

MONDAY 17 JANUARY, 2011 Time: 13h30 – 15h30

PEACE PALACE, CHAMPEI ROOM



ABBREVIATIONS

ADB	-	Asian Development Bank
AFD	-	Agence Française de Développement (French Development Bank)
APETIT	-	Network of Asia Pacific Education and Training Institutes in Tourism
ASEAN	-	Association of Southeast Asian Nations
ASEANTA	-	ASEAN Tourism Association
BIMP-EAGA	-	Brunei-Indonesia-Malaysia-Philippines East ASEAN Growth Area
CAGR	-	Compound Annual Growth Rate
CBT	-	Community Based Tourism
CIQS	-	Customs, Immigration, Quarantine, Security
ECPAT	-	End Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes
EU	-	European Union
GDP	-	Gross Domestic Product
GMS	-	Greater Mekong Subregion
GTZ	-	German Technical Cooperation Organization
IFC	-	International Finance Corporation
JBIC	-	Japan Bank for International Cooperation
JICA	-	Japanese International Cooperation Agency
Lux-Development	-	Development Aid Luxembourg
MTCO	-	Mekong Tourism Coordinating Office
MTF	-	Mekong Tourism Forum
NGO	-	Nongovernment Organization
NTA	-	National Tourism Administration
NTO	-	National Tourism Organization
PATA	-	Pacific Asia Travel Association
PIU	-	Project Implementation Unit
PCU	-	Project Coordinating Unit
SNV	-	Netherlands Development Organization
TSS	-	Tourism Sector Strategy
TWG	-	Tourism Working Group
UNIAP	-	United Nations Inter-Agency Project on Human Trafficking
UNDP	-	United Nations Development Programme
UNESCAP	-	United Nations Economic and Social Commission for Asia and the Pacific
UNESCO	-	United Nations Educational, Scientific and Cultural Organization
UNWTO	-	United Nations World Tourism Organization
UNWTO-STEP	-	United Nations World Tourism Organization - Sustainable Tourism for Eliminating Poverty
WB	-	World Bank
WTTC	-	World Travel and Tourism Council

NOTE

In this report, “\$” refers to US dollars.



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OVERVIEW OF THE GMS TOURISM SECTOR STRATEGY 2011 – 2015 ROAD MAP

Long-term Impact:

“Contribute to an improved quality of life of the population in line with the Millennium Development Goals on poverty alleviation, gender equality and empowerment of women, and environmental sustainability.”

Outcome:

“Greater distribution of the economic benefits of tourism within the Greater Mekong Subregion and significant contribution to sustainable development, gender equality, and poverty alleviation through tourism in the GMS.”

Strategic Directions and Consolidation of Strategic Programs

1. Tourism-related Human Resource Development Program

1.1 Capacity building for mid and senior level officials to improve HRD planning at the national and provincial level

1.2 Capacity building for tourism and hospitality vocational training institutions and cascade training in priority destinations and multi-country circuits

1.3 Upgrade tourism training facilities and equipment at vocational training institutions in priority tourism destinations and the main GMS cities

2. Pro-poor, Sustainable Tourism Development Program

2.1 Safeguard heritage sites and vulnerable groups from the negative impacts of tourism

2.2 Develop pro-poor tourism products and services in the priority destinations and multi-country circuits

2.3 Develop tourism infrastructure in the priority tourism destinations

2.4 Promote private sector participation and partnerships in sustainable tourism development

3. Subregional Marketing and Product Development Program

3.1 Improve market research and harmonize arrivals statistics

3.2 Joint marketing of multi-country Mekong branded nature and culture destinations/circuits

3.3 Multi-country product development and improvement in quality standards of tourist facilities and services

3.4 Facilitate Cross Border Travel

1. Introduction

1.1 Background & Objectives

1. The Greater Mekong Subregion¹ (GMS) Strategic Framework 2002–2012 includes tourism as one of 11 flagship programs that can substantially contribute to achievement of the GMS shared vision of a prosperous, integrated and harmonious subregion. To provide a more focused direction for cooperation in the tourism sector and guide actions on common strategic issues, the GMS countries together with the Asian Development Bank and key GMS tourism sector stakeholders launched the GMS Tourism Sector Strategy (TSS) in 2005.
2. The objective of the TSS is to promote tourism growth that is environmentally, socially and economically sustainable, reduces poverty, and equitably benefits women and ethnic groups. It includes 29 priority projects grouped under 7 strategic programs:
 - marketing and product development that promotes multi-country tourism and joint promotional activities;
 - human resource development to upgrade the capacity and skills of tourism officials, academic institutions with tourism programs, and hospitality trainers;
 - heritage conservation and social impact management to improve standards of heritage management and enhance measures to prevent and manage the negative social impacts of tourism;
 - pro-poor tourism development that reduces the incidence of poverty and increases rural incomes in poor areas;
 - private sector participation and partnerships in planning, investment and subregional marketing;
 - facilitating the movement of tourists to and within the subregion, and;
 - tourism-related infrastructure improvements to improve access to tourist destinations, help spread the benefits of tourism more widely, improve environmental conditions, and protect heritage sites.
3. The 29 priority projects were to be implemented over two five-year periods covering 2006 to 2010 and 2011 to 2015. Except for the single destination marketing function, all projects are implemented at the country level with one country taking the lead to coordinate a subregional project or each country leading implementation as in the case of the pro-poor tourism program. The Mekong Tourism Coordinating Office based in Bangkok, Thailand, supports coordination of all 29 strategic projects and leads implementation of the marketing program.
4. To take stock of progress, issues and challenges in implementing the TSS, in May 2010 the GMS Tourism Working Group (TWG) decided to conduct a comprehensive midterm review to assess progress towards achieving the impact and outcome of the Strategy and determine the relevance of subregional programs and priority projects. The midterm review also sought to assess the effectiveness of institutional mechanisms to implement and coordinate the Strategy and propose priority programs and projects to implement from 2011 to 2015. This report summarizes the findings of the midterm review.

¹ The Greater Mekong Subregion is comprised of the Kingdom of Cambodia, Guangxi Zhuang Autonomous Region and Yunnan Province of the People's Republic of China, Lao People's Democratic Republic, Union of Myanmar, Kingdom of Thailand, and the Socialist Republic of Viet Nam



2. Situational Analysis

2.2 Tourism Assets

5. The Greater Mekong Subregion is characterized by its abundance of natural and cultural assets with the iconic Mekong River at its core. Its mountains, valleys and coastal regions contain pristine sea beaches, lush tropical monsoon forests, globally important wildlife, and some of the earliest known human settlements in Southeast Asia. Ancient and diverse cultural heritage including Buddhist traditions, religious and vernacular architecture, music, literature and indigenous knowledge enrich the subregion and add to the appeal of its striking rural landscapes and vibrant urban centers.
6. In addition to its natural and cultural tourism resources that attract leisure travelers, the GMS is also a major center for business, education, conventions and other events that are driven by its rapidly growing economies, population of more than 300 million people, and a highly competitive cost structure.

2.3 Recent Tourism Growth Trends

7. In 2009 the GMS attracted approximately 26 million international tourists and as many as 250 million domestic tourists². As shown in table 1 the subregion's cumulative annual growth rate in international arrivals is 6% and ranges from 3% to 18% among the individual GMS countries and provinces. Overall, the average length of stay for the international market is 7.5 days and spending approximately \$19.8 billion. It is estimated that the subregion accounts for 3% of global tourism and around 43% of ASEANs international arrivals. Based on World Travel and Tourism Council (WTTC) economic research data in 2009 tourism sustained 4.45 million direct jobs³ among the subregion's transportation, accommodation, travel and tour operations, shopping, entertainment and various other service and productive sectors. By 2020 the WTTC is forecasting direct employment will increase to 6.13 million and corresponding economic output to \$51.95 billion⁴ or just over 6% of subregional GDP.

Table 1: GMS International Tourist Arrivals 2000 – 2009

	2000	2002	2004	2006	2008	2009	CAGR 00-09
Cambodia	466,365	786,524	1,055,202	1,700,041	2,125,465	2,161,577	18.58%
Lao PDR	737,208	735,662	894,806	1,215,106	1,736,787	2,008,363	11.78%
Myanmar	207,665	217,212	241,938	263,514	193,319	243,278	1.77%
Thailand	9,578,826	10,872,976	11,737,413	13,838,488	14,584,220	14,087,767	4.38%
Viet Nam	2,150,100	2,627,988	2,927,876	3,583,486	4,207,895	3,742,731	6.35%
Yunnan	1,001,141	1,303,550	1,101,000	1,111,744	2,044,483	2,305,052	9.71%
Guangxi	1,229,100	1,363,400	1,175,800	1,707,729	1,620,466	1,645,264	3.29%
Total	15,370,405	17,907,312	19,134,035	23,420,108	26,512,635	26,194,032	6.1%

Source: Pacific Asia Travel Association; Mekong Tourism Coordinating Office 2009. CAGR = cumulative annual growth rate
 Statistics to Yunnan & Guangxi do not include arrivals from Hong Kong & Macao

8. About 61% of GMS international arrivals originate in Asia, led by Thailand, Malaysia, Republic of Korea, Japan, and the People's Republic of China. Europe accounts for 23.1% of the international market followed by the Americas and Oceania at 7% and 4.7% respectively. Arrivals from within ASEAN increased at an average annual rate of 13% from 2004 to 2009. Despite a slight downturn following the economic recession of 2008/09, a strong recovery is underway with 2010 arrivals on track to increase by approximately 17% compared to 2009. Based on these figures, GMS international arrivals could reach around 30 million in 2010.

² Yunnan, PRC and Thailand account for most of the subregion's domestic tourism with 120 million and 80 million annual arrivals, respectively

³ Not including Yunnan and Guangxi (see http://www.wttc.org/eng/Tourism_Research/Economic_Data_Search_Tool/)

⁴ Equal to 5.7% and 6.2% of subregional economic output in 2009 and 2020, respectively



2.4 Key Issues and Challenges

9. A situational analysis and discussions with the GMS Tourism Working Group (TWG), National Tourism Organizations (NTOs), development partners, nongovernment organizations (NGOs) and the private sector confirmed that expanding the tourism sector and making it more inclusive remains a priority of GMS Governments and industry stakeholders. Despite strong political support and impressive performance in terms of growth in arrivals and tourism-related investment, the challenges to harnessing tourism's potential to reduce poverty and underpin sustainable development remain broadly the same as they were in 2005. The midterm review found:

- improving but persistent imbalances in the distribution of tourist arrivals and the benefits of tourism between and within countries despite strong and resilient growth in total subregional arrivals;
- although improving, the capacity of tourism management systems at the national, provincial and local level to manage tourism growth in ways that are more inclusive and economically, environmentally and socially sustainable needs to be strengthened further;
- marketing and development of multi-country nature and culture based subregional tourism products continues to be challenged by cumbersome immigration procedures and policies that impede the movement of tourists and tourism operators between countries;
- infrastructure, especially last-mile access infrastructure in the less developed GMS countries is inadequate to enable broad participation of the poor in the tourism economy;
- implementation of measures to safeguard natural and cultural (tangible and intangible) heritage and vulnerable groups from the negative impacts of tourism needs strengthening;
- limited private sector adoption of responsible tourism practices and partnerships with local communities affected by tourism;
- slow adoption of new destination marketing technologies by NTOs and smaller tour operators, and;
- the need for the tourism industry to take steps to mitigate and adapt to climate change.

Table 2: Key GMS Tourism Sector Strengths, Weaknesses, Opportunities and Threats

<p>Weaknesses</p> <ul style="list-style-type: none"> • Low market awareness and destination image of less developed GMS countries. • Inadequate infrastructure and facilities at natural and cultural tourism sites. • Variable quality of tourist facilities and services. • Inadequate safeguarding of heritage sites important for tourism. • Limited private sector adoption of responsible tourism practices. • Weak public sector tourism management capacities. • Insufficient participation and empowerment of local communities 	<p>Strengths</p> <ul style="list-style-type: none"> • World-class natural and cultural heritage assets. • Improving tourism investment policies and legal frameworks. • Tradition of hospitality. • Rapidly improving subregional connectivity and gateway access. • Competitive cost structure. • Cultural diversity of ethnic groups and rich local knowledge that could underpin innovative new tourism products
<p>Opportunities</p> <ul style="list-style-type: none"> • Large untapped market interested in world-class multi-country nature and culture based tourism products. • Substantial interest in the tourism sector among domestic and international investors. • Large and growing number of consumers that base travel choices on online information 	<p>Threats</p> <ul style="list-style-type: none"> • Erosion and loss of cultural and natural heritage. • Trafficking, sexual exploitation, HIV/AIDS and communicable disease outbreaks. • Political instability within and between countries. • Natural disasters such as tsunamis,

<ul style="list-style-type: none"> • Increased demand for responsible products • Strong commitment to regional and subregional cooperation in tourism under GMS and ASEAN frameworks. 	<ul style="list-style-type: none"> • earthquakes and typhoons. • Environmental degradation and impacts of climate change.
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3. Progress and Lessons Learned

3.1 Progress Review

3.1.1 Outcome Targets

10. Progress towards achieving outcome targets listed in the TSS monitoring framework has been mixed. While distribution of arrivals is becoming more equitable, economic benefits of tourism are still mainly concentrated in the subregion's main tourism enclaves and urban areas.

- The share of total arrivals to the countries of the GMS excluding Thailand increased from 38.4% in 2004 to 46% in 2009;
- Based on the number and magnitude of pro-poor tourism projects and related initiatives implemented between 2006 and 2010, it is estimated that at least 133,000 people were taken out of poverty through their participation in tourism-related livelihoods compared to the original target of 160,000 by 2010;
- While improving, the capacity to implement measures to protect natural, cultural and historical resources in the key tourism zones remains limited;
- Despite substantial investments in tourism-related HRD the subregion remains challenged to meet its capacity and training requirements.
- While in most instances women dominate lower paid service professions in the tourism sector a disproportionate number of public and private sector management positions are filled by men.
- Private sector investment in tourist accommodations and other micro, small and medium sized tourism enterprises has been strong and accelerating, in particular in the main tourist destinations and urban centers. All GMS countries have various industry associations and some have nascent tourism marketing and promotion boards.
- The NTOs and in some cases the private sector frequently attend multi-sector subregional and national working groups that aim to prevent negative social impacts of tourism such as HIV/AIDS, trafficking, and child sex tourism.

3.1.2 Strategic Programs & Output Targets

11. Notwithstanding the challenges mentioned above and the complex political, legal, financial, and security issues that have delayed implementation of a single visa scheme, the mid-term review found that good progress has been made towards achieving the output targets of the strategic programs.

- Subregional marketing and promotion by MTCO and the NTOs has been strengthened, as exemplified by the ExploreMekong campaign, revival of the Mekong Tourism Forum in 2010, and increased visibility of the Mekong brand at tourism trade shows and other networking events. At the country level, marketing and promotion in cross border areas is gaining momentum as evidenced by SNV/UNWTO support for the Mekong Discovery Trail in northeast Cambodia, JICA support to promote tourism along the East West Economic Corridor in Lao PDR, and ADBs GMS Sustainable Tourism Development Project that promotes tourist attractions and investment along segments of the East West and North South Economic Corridors in Lao PDR and Viet Nam.
- Most countries have endorsed national tourism HRD plans. Projects to strengthen tourism vocational training institutions are active in less developed GMS countries and those with established programs are providing scholarships for their neighbors. Some cascade train-



the-trainers training has recently been implemented as a result of these programs. Tourism competency standards have been endorsed by ASEAN leaders but implementation of the standards in the GMS countries has been slow. Lux-Development and the European Union (EU) have provided substantial assistance to Viet Nam and Lao PDR to establish national Tourism and Hospitality Vocational Training Centers.

- A limited number of officials have participated in train the trainer programs that aim to improve natural and cultural heritage management and tourism planning. The UNESCO Cultural Heritage Specialist Guide Training Program has trained heritage site managers and guides to plan, interpret, and manage tourism activities at World Heritage Sites more effectively. ADBs GMS Phnom Penh Plan for Development Management has held an annual learning program on tourism management in the GMS since 2006. Biodiversity conservation corridors that are utilized for nature based tourism development have been created in priority tourism areas under the GMS Biodiversity Conservation Corridors Initiative⁵.
- At least 35 pro-poor tourism projects or activities have been supported by the development partners between 2005 and 2010. Pro-poor tourism has been prioritized in all national tourism development plans/policies, and if not already included, is being incorporated into national socio-economic development plans as they are updated. Pilot approaches to pro-poor tourism development are being expanded to include both community-based tourism and value chain interventions based on cutting edge research supported by SNV and GTZ. Many community based ecotourism activities have been supported by NZAID, World Wildlife Fund, Wildlife Conservation Society and other NGOs.
- Private sector participation has increased substantially at the subregional and country level as indicated by (i) investment in an additional 92,084 accommodation rooms in Viet Nam, Lao PDR and Cambodia alone between 2006 and 2010, of which an additional 14,537 rooms in Cambodia and Lao PDR were supplied by 817 new small-scale guest-house establishments, (ii) liberalization of investment policies and designation of tourism as a priority sector for investment, (iii) increasing numbers of micro and small enterprises controlled by women, and; (iv) more industry associations that are able to effectively engage governments. In Cambodia and Lao PDR the number of travel operators increased by 63% between 2005 and 2009.
- Some of the barriers to cross-border travel have been relaxed by eliminating visa requirements for nationals of ASEAN⁶ and many other countries. Visa on arrival facilities have been improved at the major immigration checkpoints and eVisa pre-clearance systems introduced in Viet Nam and Cambodia.
- There has been considerable investment in infrastructure designed to improve access to tourist sites, improve environmental conditions in key destinations, and help to protect natural and cultural heritage sites. Infrastructure investments have mainly been led by GMS governments with the assistance of multilateral development banks⁷, other development partners and the private sector.

12. While the progress towards achieving the TSS output targets is quite impressive much remains to be accomplished in all of the seven priority programs. For example:

- The subregional marketing program has had limited success in mobilizing resources and coordinate the private sector stakeholders and NTO marketing departments. The TSS proposal to establish a subregional Tourism Marketing and Promotion Board has generated limited interest.

⁵ Asian Development Bank. (2008). Core Environment Program and Biodiversity Conservation Corridors Initiative in the Greater Mekong Subregion TA-6289 REG:

⁶ The ASEAN Framework Agreement on Visa Exemption exempt citizens of ASEAN Member Countries holding valid national passports from visa requirement (to visit other ASEAN countries party to the agreement) for a period of stay of up to 14 days provided that such stay shall not be used for purposes other than visit.

⁷ As demonstrated by the GMS Mekong Tourism Development Project (2003-2008) in Cambodia, Lao PDR and Viet Nam, and the GMS Sustainable Tourism Development Project (2008-2014) in Lao PDR and Viet Nam.



- Coordination of all strategic programs at the subregional level has been challenged by limited financial and human resources. There is scope to improve MTCOs subregional tourism web-based knowledge center.
- There is a need for more investments in tourism-related human resource development at the provincial and local level to narrow the gap between service standards and tourism management practices in emerging and established destinations.
- Immigration policies and customs regulations continue to hinder the operation of multi-country tours. Some GMS countries are reluctant to eliminate tourist visa fees and typically issue only single entry visas, making travel between the countries less competitive in terms of price and convenience. Though improving, the difficulty in moving private vehicles across borders is suppressing growth in self-driving tours.
- Practices to avoid and mitigate the negative impacts of tourism need to be improved and mainstreamed.
- Pro-poor tourism approaches involving both community based tourism and broader value chain interventions have yet to be widely adopted.
- Environmentally and socially responsible practices including actions to mitigate climate change and protect unique ecosystems need to be expanded.
- Expansion of pilot programs that promote equitable partnerships between the private sector and communities has been slow.

3.1.3 Effectiveness of the MTCO

13. While the basic structure and function of the MTCO appears to be acceptable to the countries there is scope to improve its effectiveness. The midterm review notes:

- MTCOs capacity to market the subregion as a single destination could be strengthened by reinvigorating the private sector support group, updating the subregional marketing strategy and action plan, tapping the support of industry champions to help mobilize private sector financial support, and exploring ways to establish itself as a legal entity. A lack of legal recognition has prevented MTCO from entering into formal agreements with development partners and the private sector, thus making it difficult to mobilize financial resources.
- Limited staff and financial resources, compounded by difficulties in obtaining regular progress reports from the countries has challenged MTCO to effectively coordinate 29 projects across six countries. MTCOs project coordination function could be streamlined by consolidating the number of priority projects and implementing a simple, easy-to-use results monitoring system that produces regular progress reports for public dissemination.
- Resource mobilization, harmonization of activities, and project coordination could be enhanced through establishment of multi-stakeholder tourism development networks that meet regularly in each country. Repackaging subregional projects into country components would facilitate funding by the development partners as the Government institutions that execute development assistance exist only at the country level.
- MTCOs forward planning and resource mobilization capabilities could be enhanced by prioritizing strategic projects and activities in a five-year resourcing strategy with revolving one-year action plans. The plan would cover the marketing, project coordination, and secretariat functions of MTCO and reflect the revised GMS TSS Road Map 2011 - 2015. After endorsement by the TWG, the plan would be presented to GMS governments and development partners to source financing.
- Although the outcome and strategic programs of the TSS remain relevant going forward, the Strategy's 2005–2010 action plan was clearly too ambitious given the MTCO and NTOs limited institutional capacity and limited resources to effectively implement and coordinate 29 complex subregional projects.

3.2 Lessons Learned

- 14. Marketing and Product Development.** Key lessons include the value of (i) regularly updating the marketing strategy based on regular market research to reflect anticipated situations such as recession or recovery; (ii) forming partnerships between NTOs, transportation providers, accommodation and tour operator groups to leverage resources; (iii) making greater use of country resources already deployed in key markets to promote the subregion; and (iv) online destination marketing and favorable public relations.
- 15. Tourism HRD.** Key lessons include (i) the importance of establishing effective cooperation mechanisms between all stakeholders to develop national tourism human resource development strategies and implement subregional standards; (ii) the need to secure sustainable finance for vocational tourism training activities, for example through public-private partnerships and income from training hotels and restaurants; (iii) the capacity of trainers and hospitality managers to update curriculum that meets changing industry demands can be accelerated by enhancing partnerships and structured exchanges between tourism training institutions within and outside the subregion; and (iv) local communities require improved access to tourism training opportunities such as scholarships and outreach programs to prepare them to access higher paying jobs in the sector. The skills and capacity of provincial, district and community trainers need to be enhanced and resources provided to implement cascade training in emerging tourist destinations.
- 16. Safeguarding Heritage and Vulnerable Groups.** Key lessons include the need to: (i) assist national implementing agencies mobilize technical and financial resources to institutionalize and implement cascade training after master trainers are trained; (ii) translate training materials into local languages; (iii) include local communities in training activities; (iv) promote adoption of more responsible tourism practices by the private sector; (v) employ a wide range of approaches to combat negative social impacts of tourism on women and vulnerable groups, including education and information campaigns, strengthened legal frameworks, and law enforcement; and (vi) obtain government and industry support to mainstream responsible tourism practices that include environmental and social safeguards.
- 17. Pro-poor Tourism.** The main lessons include the importance of (i) allocating enough time and resources to implement participatory development methodologies that enable local communities to plan and manage tourism; (ii) using diagnostic tools such as value chain analysis when designing pro-poor tourism initiatives; (iii) early involvement of the private sector in the planning, development and marketing of pro-poor tourism products and services; (iv) including measures in project design to enhance equitable participation of women and ethnic groups; (v) implementing simple and effective results monitoring and evaluation systems; and (vi) promoting partnerships and transparency among stakeholders.
- 18. Travel Facilitation.** The main lessons include the importance of acknowledging the complexity of single visa schemes and the need to bring together several GMS working groups and line ministries to address this issue. In order to avoid market confusion and loss of competitiveness when entry visas are required there is a need for consistent immigration policies, procedures and privileges. E visa and multiple entry visas greatly favor increased length of stay and repeat visitation.
- 19. Private Sector Participation.** The main lessons include: (i) the need for clear policies and transparent procedures to guide investment in tourism; (ii) the importance of establishing efficient one-stop approval and permit processing centers; (iii) the importance of forming strong associations that are able to effectively articulate industry concerns to government; (iv) the importance of working closely with local communities and other local stakeholders when undertaking tourism investments, and; (v) recognition of the role that the development partners and civil society can play as “honest brokers” to facilitate equitable community participation in tourism enterprises.

3.3 Recommendations for Updating the Strategy and Road Map for 2011-2015

20. **Consolidate and integrate the strategic programs.** The “soft” program components dealing with marketing, human resources development, heritage conservation, pro-poor tourism, private sector participation and travel facilitation, needs to be better integrated with the spatial destination and tourism infrastructure development components.
21. **Agree on a clearer spatial cooperation framework.** The current spatial destination component of the TSS is too fragmented, not sufficiently market orientated, and needs to be rationalized around a single organizing principle. For example, the current framework that includes 11 zones could be adjusted so that the Mekong River Tourism Corridor shared by the 6 GMS countries is the “core” and natural and cultural attractions/destinations are linked to this core by thematic multi-country touring circuits.
22. **Adopt a focused and resource sensitive implementation approach.** Consolidate the seven strategic programs to three to better align with the institutional capacity and resources of the NTOs and encourage multi-sector cooperation during implementation. It is suggested the programs are reorganized as follows:
 - Programs involving training of senior and mid-level public sector tourism officials, deans and professors and trainers in education and vocational institutions are included in the proposed **Tourism-related Human Resource Development Program**.
 - Heritage safeguarding, tourism infrastructure development, pro-poor tourism initiatives, and private sector participation are consolidated into the proposed **Pro-poor Sustainable Tourism Development Program**.
 - Joint marketing, product development, development and implementation of quality standards, and travel facilitation are folded into a subregional **Marketing and Product Development Program**.
23. **Enhance subregional and national implementing arrangements.** The implementation arrangements for subregional projects at both the subregional level and national level needs to be strengthened. It is recommended the NTOs establish (i) a subregional multi-sector task force for each reorganized priority program, (ii) project coordination units (PCUs) at the country level, and (iii) project implementation units (PIUs) at the project site level. This approach has been successfully trialed during implementation of the GMS Mekong Tourism Development Project and can be expanded to support project implementation and coordination in all GMS countries. It will help to ensure that all the hard and soft elements of the priority programs are implemented in an integrated, focused and results orientated way.
24. **Enhance monitoring and evaluation.** Communications between the TWG, MTCO and other stakeholders needs to be more interactive to facilitate enhanced data collection and reporting. Improved communication would also allow MTCO to better coordinate priority programs and capture and disseminate lessons. Moreover, MTCOs data collection methodology should be refined to improve collection and analysis of empirical data that can be used to measure progress against indicators in the TSS design and monitoring framework. While MTCO has effectively monitored tourist arrivals and distribution of arrivals among the GMS countries, resource constraints have limited systematic monitoring of other indicators.
25. **Practice adaptive management.** It is recommended the TWG, MTCO and key development partners together review the proposed the TSS Road Map 2011–2015 on a regular basis to ensure its relevance in dynamic situations and adjust plans/programs if necessary. Adequate time for this discussion should be allocated during one of the semi-annual TWG meetings.
26. **Mobilize resources to implement the priority programs.** While the development partners are an important source of financial and technical assistance more needs to be done to harness the private sector’s innovation, access to finance, and marketing expertise to develop and mainstream pro-poor sustainable tourism.

4. NEW DIRECTIONS 2011 - 2015

4.1 *Impact, Outcome and Expected Outputs to 2015*

27. Reflecting on achievements, challenges and lessons learned during 2005–2010 the expected impact, outcome and outputs of the GMS Tourism Sector Strategy remain as stated in 2005⁸:

Impact: Contribute to an improved quality of life of the population in line with the Millennium Development Goals on poverty alleviation, gender equality and empowerment of women, and environmental sustainability.”

Outcome: Greater distribution of the economic benefits of tourism within the Greater Mekong Subregion and significant contribution to sustainable development, gender equality, and poverty alleviation through tourism in the GMS.

Outputs: (i) strengthened subregional marketing and product development; (ii) enhanced human resource development capacities in the subregional tourism sector; (iii) improved heritage management and social impact management capabilities; (iv) increased contribution to poverty alleviation from the tourism sector; (v) increased private sector participation in the tourism sector; (vi) reduction of barriers to cross border travel; and (vii) construction of tourism-related infrastructure for promoting greater distribution of tourism benefits in the subregion and protecting natural and cultural heritage resources of interest to tourism.

4.2 *Strategic Directions and Targets 2011 - 2015*

4.2.1 *Revised Spatial Strategy*

28. The proposed spatial strategy focuses on segments of the Mekong River Corridor and linked circuits. It provides a more market oriented approach towards implementing the reorganized strategic programs without detracting from the strategic agenda of poverty reduction, gender equity and sustainable development. Suggested Mekong segments and subregional tour circuits for development during 2011 to 2015 are:
- » **‘Mekong Discovery Trail’** extending from northeast Cambodia into southern of Lao PDR and including new segments of the river in the Green Triangle, Emerald Triangle, and Shangri-la-Tengchong-Myitkyina tourism zone in northern Yunnan and Myanmar, among others;
 - » **‘Mekong Delta and Southern Coastal Corridor’** comprising the Southern Economic Corridor that links the Mekong Delta in Viet Nam to the southern coast of Cambodia and Thailand’s eastern seaboard;
 - » **‘Mekong Heritage Trails’** represented by the East-West Economic Corridor and the TSS Heritage Necklace. The Northern Heritage Trail under development in Lao PDR proposes to link Northern Thailand, Lao PDR and Northern Viet Nam. There are many options for developing trails and circuits that link to the Mekong River;
 - » **‘Mekong Karst Landscapes’** linking Luang Prabang and Houhapanh, Lao PDR to Northern Viet Nam, Guangxi Zhuang Autonomous Region, and central Viet Nam and south-central Lao PDR;
 - » **‘Mekong Tea Horse Trail’** covering segments of the North-South Economic Corridor and Mekong River that link northern Thailand to northwest Lao PDR, northern Myanmar, and Yunnan, PR China;
 - » **‘Steps of Shiva and the Lord Buddha’** retaining the same focus as the TSS priority project 11 - In the Steps of Shiva and the Lord Buddha: Linking the Ancient Monumental Heritage of the GMS.

⁸ Performance targets and indicators are listed in appendix 2 of the GMS Tourism Sector Strategy



4.2.2 Strategic Programs

29. In the context of the recommended spatial framework and consolidated strategic programs it is proposed GMS NTOs, development partners and the private sector focus resources on implementation of the three consolidated strategic programs in the priority Mekong segments and subregional tour circuits from 2011 to 2015. Suggested activities for immediate implementation under each strategic program are listed below:
- **Tourism-related Human Resource Development Program:** (i) capacity building of the NTOs and training of senior officials at the national and provincial level to develop and implement tourism HRD plans; (ii) capacity building and skills training for tourism and hospitality vocational training institutions and trainers; (iii) upgrade tourism training facilities and equipment at the vocational training institutions; (iv) expand training opportunities for micro, small and medium tourism and hospitality enterprises and (v) language training for border officials.
 - **Pro-poor Sustainable Tourism Development Program:** (i) enhance efforts to safeguard heritage⁹ and vulnerable groups from the negative impacts of tourism and improve heritage interpretation at key sites; (ii) accelerate development of pro-poor tourism products and services including tourism value chains and community based tourism; (iii) develop “last mile” tourism infrastructure that improves access to tourist sites, install protection infrastructure¹⁰ at priority sites and destinations, and improve tourist information at border facilities; (iv) promote private sector investment in responsible tourism ventures, including partnerships with local communities; and (v) promote energy efficiency, pollution abatement, and the use of environmentally friendly technologies.
 - **Subregional Marketing and Product Development Program:** (i) facilitate multi-country product development by the private sector and improvements in quality standards of tourist facilities and services; (ii) joint marketing of the priority Mekong segments and subregional tour circuits; (iii) continue to streamline cross border travel formalities; and (iv) harmonize the collection, analysis and dissemination of international and domestic tourism statistics.
30. The proposed 2011 to 2015 Road Map with priority programs, projects and budget estimates is in Appendix 1.

5. Implementation and Monitoring

31. The current implementation and monitoring approach involves several groups at the subregional and national level. Overall leadership and policy guidance is provided by the **GMS Tourism Ministers and Senior Officials**. Semi-annual meetings of the **GMS Tourism Working Group**¹¹ review implementation of the subregional priority programs and projects, exchange lessons on the implementation of projects, coordinate with development partners and report to the GMS Tourism Ministers and Senior Officials. The TWG also has the mandate to interact with other GMS working groups such as Environment, Human Resources, Trade Facilitation and the GMS Transport Forum.
32. **The Mekong Tourism Coordinating Office** (i) coordinates implementation of TSS projects and programs, (ii) leads the single destination marketing program, and (i) serves as the TWG secretariat. It also monitors tourism developments in the subregion, maintains a promotional website and an institutional website with a GMS tourism web based knowledge center, and maintains relations with the development partners, a range of NTOs, and the private sector.

⁹ “Heritage” is broadly defined as natural protected areas, cultural and historic sites and cultural practices

¹⁰ Examples of protection infrastructure are reticulated wastewater treatment facilities, sanitary landfills, river embankment protection, environmentally sensitive walkways in caves, mangrove forests and appropriate wildlife viewing facilities.

¹¹ TWG representation includes Director-General or above officials from the 5 GMS NTOs and the Directors of the Yunnan and Guangxi Zhuang Provincial Tourism Departments.



33. When requested by TWG, members of an **ad-hoc advisory board** comprised of development partners, civil society, and tourism industry organizations are called upon to provide advice, policy guidance and technical assistance.
34. In 2005 it was envisioned that a **private sector partners group** consisting of representatives from GMS Tourism Marketing Boards, various tourism-related industry associations and the air and land carriers would be established to support the marketing and product development functions of the MTCO and support the annual Mekong Tourism Forum. However, the private sector partners group has not been formalized and few initiatives have been launched.
35. **National Tourism Working Groups** or inter-ministerial committees involving tourism exist in one form or another in all the GMS countries. The extent to which these groups are informed of and drive the subregional tourism agenda is unclear. When a project or program is financed a **project coordination unit** is typically established in the NTO, Government Ministry, or provincial department to administer the project. A **project implementation unit** supervises day-to-day implementation and reports to the PCU, which in turn reports to the TWG country representative.
36. Conceptually this approach appears adequate to coordinate and implement strategic programs and projects. As noted it has been challenging to put into practice. Based on feedback from the TWG, MTCO, and other stakeholders, it is recommended implementation, coordination and monitoring of the strategy would be enhanced by:
- appointment of two focal points in each NTO/provincial tourism department to coordinate development projects (1 person) and subregional marketing initiatives (1 person) together with MTCO;
 - reinvigorating the private sector partners group;
 - broader participation of the ad-hoc advisory board during TWG meetings; and
 - greater involvement of other GMS working groups in TWG meetings and strategic tourism programs to address crosscutting issues, bring a fresh perspective to the TWG, and enhance complementarities with related sectors.
37. **Proposed Implementation Support Technical Assistance:** Past experience indicates that the MTCO requires a substantial increase in resources to allow it to more effectively undertake project coordination, monitoring, subregional marketing, and carry out its TWG secretariat function. A total of \$2 million in technical assistance funds are sought for three to five years to support (i) establishment of a sustainable finance mechanism to expand and sustain subregional marketing efforts; (ii) preparation of project proposals for priority projects on behalf of NTOs and other stakeholders including small and medium tourism enterprises; (iii) development and implementation of improved reporting, monitoring and evaluation systems; (iv) strengthening institutional arrangements to implement the TSS priority programs at the subregional and national level, and (v) improvement of the GMS tourism web-based knowledge center and training on project coordination and implementation for NTO officials.

APPENDIX 1. PROPOSED GMS TOURISM SECTOR STRATEGY IMPLEMENTATION ROAD MAP 2011 – 2015

Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
1. Tourism Related Human Resource Development (HRD) Program				
<p>1.1: Capacity building for mid and senior level officials to improve tourism-related HRD planning</p> <p>Expected Benefits:</p> <ul style="list-style-type: none"> Increased capacity of mid and senior level officials to effectively plan HRD strategies Increased competitiveness of tourist facilities and services Increased investment in tourism facilities and service champions in each country 	<ul style="list-style-type: none"> Undertake capacity building needs analysis in the priority destinations and multi-country circuits Prepare a corresponding capacity building program to meet capacity building needs. Undertaking capacity building for middle and senior level officials in the NTOs to work with the related agencies to prepare HRD plans. Prepare HRD plans for the priority destinations and multi-country circuits 	<p>Coordination by MTCO with country implementation by NTOs in coordination with related Ministries. Potential development partners: Regional universities and schools, APETIT, SNV, ADB, GTZ, AFD, JICA, EU, and Lux Development.</p>	<p>Capacity building and HRD planning: \$1 million</p>	<p>2011</p> <p>2011 to 2012</p> <p>2012 to 2013</p> <p>2012 to 2014</p> <p>2011 to 2015</p>
<p>1.2: Capacity building of tourism and hospitality vocational training institutions and cascade training</p> <p>Expected Benefits:</p> <ul style="list-style-type: none"> Increased supply of entry level industry training Improved quality and competitiveness of tourist facilities and services 	<ul style="list-style-type: none"> Assess the capacity building needs of deans, professors, and instructors in vocational institutions of the priority destinations. Design a capacity building program for deans, professors, and instructors Implement the capacity building program. Implement cascade training for entry level hospitality professions Create a GMS Tourism Education and Vocational Training Institutions Network. 	<p>Coordination by MTCO with country implementation by NTOs in coordination with related Ministries. Potential development partners: Regional universities and schools, APETIT, SNV, ADB, GTZ, AFD, JICA, EU, and Lux Development.</p>	<p>Train-the-trainers and cascade training program in 20 institutions: \$10 million</p>	<p>2011</p> <p>2011 to 2012</p> <p>2011 to 2012</p> <p>2011 to 2015</p>
<p>1.3: Upgrade tourism vocational training facilities and equipment in provincial education and training institutions and in the main cities of GMS countries</p> <p>Expected Benefits:</p> <ul style="list-style-type: none"> Increased supply and quality of entry level industry training Increased competitiveness of tourist facilities and services 	<ul style="list-style-type: none"> Identify and assess target vocational training institution facilities and equipment requirements. Prepare a program of works to upgrade target training institution facilities and equipment. Implement the program with the support of the development partners. 	<p>Coordination by MTCO with country implementation by NTOs in coordination with related Ministries. Potential development partners: Regional universities and schools, APETIT, SNV, ADB, GTZ, AFD, JICA, EU, and Lux Development.</p>	<p>Vocational training school upgrading program: 20 schools @ \$500,000 or \$10 million</p>	<p>2011 to 2011</p> <p>2011 to 2013</p> <p>2013 to 2014</p> <p>2011 to 2015</p>



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
2. Pro-poor Sustainable Tourism Development Program				
2.1: Safeguarding Heritage Sites and Vulnerable Groups				
2.1.1: Capacity Building for Tourism Management and Protection of Tangible and Intangible Cultural Heritage Expected Benefits: <ul style="list-style-type: none"> Improved awareness of the importance of protecting cultural heritage Enhanced protection of cultural heritage sites Limits of acceptable change established and enforced at heritage sites Increase funding for heritage conservation works and maintenance 	<ul style="list-style-type: none"> Train a corps of cultural heritage guide trainers at the subregional level and guides at the country and local level targeting the priority destinations Strengthen the tourism management capacities of cultural heritage site managers in the priority destinations Establish and maintain a subregional ethnographic databank which documents and preserves the memory of the region's ethnic diversity, provides accurate information about traditional ethnic minority cultures, and a set of principled guidelines for working with ethnic groups Develop interpretation materials and tools in local and foreign languages 	Coordination by MTCO with country implementation and UNESCO as executing agency. Potential development partners: UNDP, ADB, AFD, and others.	3 Subregional heritage guide train-the-trainer trainings: \$ 150,000 18 national guide trainings: \$360,000 4 Subregional tourism site management trainings: \$ 200,000 Ethnographic databank \$1 million Interpretation materials and tools \$150,000 per site	2011 to 2014 2012 to 2015 2011 to 2014 2011 Ongoing
2.1.2: Mitigate the Negative Impacts of Tourism Expected Benefits: <ul style="list-style-type: none"> Strong partnerships and coalitions NTOs adopt strategies to combat negative social impacts in their National Tourism Plans New sets of innovative materials in a larger range of languages Private sector is actively engaged in combating negative impacts 	<ul style="list-style-type: none"> Formation of subregional working group Organization of a forum on managing the negative impact of tourism to devise an action plan Support the work of UNIAP, ECPAT, World Vision and UNESCO through mobilization of tourism sector groups and raising industry awareness to safeguard vulnerable groups 	MTCO to coordinate with NTOs providing membership of the working group. Potential development partners: UNDP, ADB, WB, JICA, AFD, and others.	Proposed MTCO TA and in-kind contributions	2011 to 2011 2011 to 2012 2011 ongoing
2.1.3: Ecotourism Development in the Trans-boundary Biodiversity Corridors Expected Benefits: <ul style="list-style-type: none"> Improved protected area management Reduced pressure on biodiversity resources Improved livelihoods and poverty reduction 	<ul style="list-style-type: none"> Design and implementation an ecotourism development program including interpretation materials in local & foreign languages in the protected areas within and adjacent to the Mekong Discovery Trail, Southern Coastal Corridor, Emerald and Green Triangle, Mekong Heritage Trail between Lao PDR and Viet Nam, and the Golden Mekong priority destinations and multi-country circuits 	Coordination by MTCO with country implementation. ADB/CEP-BCI, IUCN, UNEP, as executing agencies with implementation by NTOs and conservation NGOs	4 Subregional tourism site management trainings: \$ 200,000 Community and private sector ecotourism interventions in 5 destinations: \$10 million	2011 to 2013 2011 to 2015



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
2.2 Develop Pro-poor Tourism Projects in priority destinations and multi-country circuits				
<p>2.2.1: Developing Pro-poor Tourism Projects in the Priority Destinations</p> <p>Expected Benefits:</p> <ul style="list-style-type: none"> Expansion of pro-poor tourism initiatives involving at least 480 cluster communities (336,000 people of whom 270,000 are poor) 	<ul style="list-style-type: none"> Design and implementation of a major pro-poor tourism project with private sector participation that targets the priority Mekong destinations in each country for total of 7 packages including one each for Yunnan and Guangxi 	<p>MTCO to coordinate with NTOs</p> <p>Potential development partners: ADB, AFD, France Regional Cooperation, WB, JBIC, GTZ, AFD, AECID, NZAID, SNV, JICA, UNDP, WB, and others.</p>	<p>Cambodia: 50 communities at \$12.5 million</p> <p>Lao PDR 30 communities at \$7.5 million</p> <p>Myanmar: 50 communities at \$12.5 million</p> <p>PRC: 200 communities at \$50 million</p> <p>Thailand: 50 communities at \$12.5 million</p> <p>Viet Nam: 100 communities at \$25 million</p> <p>Total Cost is \$120 million</p>	<p>Q4 2010 to Q1 2011</p> <p>2011 to 2011</p> <p>2011 to 2013</p> <p>2012 to 2015</p>
2.3: Develop Tourism Infrastructure in the Priority Multi-country Destinations				
<p>2.3.1: Tourism Infrastructure Development (including border facilities)</p> <p>Expected benefits:</p> <ul style="list-style-type: none"> Increased tourism volumes Visitor experience improved Tourism benefits reach communities New products developed Improved integration of conservation and development at site level Potential negative impacts minimized 	<p>Cambodia:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure along the coastal corridor in the Cambodian portion of the Southern Coastal Corridor Package 2: Improving sustainable tourism infrastructure in the Kratie-Stung Treng-Ratanakiri sections of the Mekong Discovery Trail Package 3: Improving sustainable tourism infrastructure in the Siem Reap-Preah Vihear-Monduliri, Oddar Meanchey sections of the Emerald Triangle and In the Steps of Shiva and Lord Buddha Circuit <p>Lao PDR:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Southern provinces of Pakse, Attapeu, Saravanh as part of the Green Triangle, the Emerald Triangle, In the Steps of Shiva and Lord Buddha Circuit, and the extension of the Mekong Discovery Trail in the Mekong River Tourism 	<p>National Tourism Organizations and other executing and implementing agencies</p> <p>National Tourism Organizations and other executing and implementing agencies</p>	<p>To be assessed</p> <p>To be assessed</p>	<p>2011 to 2015</p>



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
	<p>Corridor.</p> <ul style="list-style-type: none"> Package 2: Improving sustainable tourism infrastructure in the Lao PDR portion of the Mekong Heritage Trail in Savannakhet and Khammouane province Package 3: Improving sustainable tourism infrastructure in the Lao PDR portion of the Mekong Karst Landscapes tourism zone in Luang Prabang and Huaphanh Province. Package 4: Improving sustainable tourism infrastructure in the Mekong Tea Horse Trail sector of Lao PDR on the North South Economic Corridor covering the provinces of Bokeo, Luang Nam Tha and Udomxai. <p>Myanmar:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Myanmar portion of the Mekong Tea Horse Trail including the Shan State in Myanmar. Package 2: Improving sustainable tourism infrastructure in the Myanmar portion of the Shangri-la-Tengchong-Mitkyina tourism zone in the Kachin State. Package 3: Improving sustainable tourism infrastructure in the Myanmar portion of In the Steps of Shiva and Lord Buddha Circuit <p>People's Republic of China:</p> <p>Yunnan:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Yunnan portion of the Mekong Tea Horse Trail along the North South Economic Corridor in Pu'er and Xishuangbanna Prefectures. Package 2: Improving sustainable tourism infrastructure in the Yunnan portion of the Shangri-la-Tengchong-Mitkyina tourism zone. <p>Guangxi Zhang Autonomous Region:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Guangxi portion of the Mekong Karst Landscapes tourism zone. <p>Thailand:</p> <ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Thailand portion of the Emerald Triangle and In the Steps of Shiva and Lord Buddha Circuit. Package 2: Improving sustainable tourism infrastructure in the Thailand portion of the Mekong Heritage Trail centered on the East-West Economic Corridor Package 3: Improving sustainable tourism infrastructure in the Thailand portions of the Mekong Tea Horse Trail along the North South Economic Corridor. Package 4: Improving sustainable tourism infrastructure along the Thailand portion of the Southern Coastal Corridor. <p>Viet Nam:</p>	<p>National Tourism Organizations and other executing and implementing agencies</p> <p>Provincial Tourism Administration and other executing and implementing agencies</p> <p>Provincial Tourism Administration and other executing and implementing agencies</p> <p>National Tourism Organization and other executing and implementing agencies</p>	<p>To be assessed</p> <p>To be assessed</p> <p>To be assessed</p> <p>To be assessed</p>	<p>2011 to 2015</p>



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
	<ul style="list-style-type: none"> Package 1: Improving sustainable tourism infrastructure in the Viet Nam portion of the Mekong Delta and Southern Coastal Corridor. Package 2: Improving sustainable tourism infrastructure in the Viet Nam portion of the Mekong Heritage Trail and East-West Economic Corridor. Package 3: Improving sustainable tourism infrastructure in the Viet Nam portion of the Green Triangle. Package 4: Improving sustainable tourism infrastructure in the Viet Nam portion of the Mekong Karst Landscapes tourism zone. 	National Tourism Organization and other executing and implementing agencies	To be assessed	2011 to 2015 2011 to 2015 2011 to 2015
2.4: Private Sector Promotion and Partnerships in Sustainable Tourism Development				
2.4.1: Promotion of Responsible Tourism Practices Expected Benefits: <ul style="list-style-type: none"> Mainstream adoption of responsible tourism practices 	<ul style="list-style-type: none"> Hold a forum to discuss and agree an action plan for adopting responsible tourism practices by tourist enterprises Creation of a subregional private sector tourism association as a subgroup of ASEANTA that would focus on among other things, the adoption of responsible tourism practices Adjust current incentive mechanisms and tourism business accreditation procedures in each country encourage adoption of responsible tourism practices as criteria for eligibility Create an awards program to highlight sustainable tourism best practices. Present the awards at the Mekong Tourism Forum Enhance online resources to promote responsible tourism (mekongtourism.org and explore mekong.org) 	MTCO to coordinate with NTOs undertaking implementation in each country. Potential development partners: ADB, GTZ, AFD, AECID, SNV, UNDP, WB, JICA, and others.	Forum: \$50,000 Proposed MTCO TA and in-kind contribution of subregional associations MTF Awards: \$50,000 over 5 years with in kind contribution for prizes	2011 2011 2012 to 2013 2012 to 2015
2.4.2: Promotion of Micro and Small Tourism Enterprise Expected Benefits: <ul style="list-style-type: none"> Expansion of pro-poor tourism initiatives that involve local communities, ethnic groups, and women 	<ul style="list-style-type: none"> Micro and small enterprise promotion program to assist local communities and entrepreneurs plan and develop enterprises linked to the tourism economy. The main activities involve value chain diagnostics, skills training, improved access to affordable credit, small infrastructure and marketing. 	MTCO to coordinate with NTOs undertaking implementation in each country. Potential development partners: ADB, GTZ, AFD, AECID, SNV, UNDP, WB, JICA, and Australia / UK / Canada Small Business Volunteer Service.	12 priority destinations: \$18 million	2011 to 2015



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
3. Subregional Marketing & Product Development Program				
Project 3.1: Improve Market Research and Harmonize Statistics Arrivals Expected Benefits: <ul style="list-style-type: none"> Improved data for tourism planning, research, marketing, and management. Improved monitoring and evaluation of program/project outcomes and impacts 	<ul style="list-style-type: none"> Establishment of a GMS task force for the development of a market research methodology including qualitative and quantitative surveys and harmonization of tourism statistics Organization of a forum on harmonizing tourism statistics in the GMS to promote awareness and support among key agencies and devise action plan. Implementation of training programs and adoption of harmonized procedures Organize surveys at major border checkpoints 	MTCO to lead supported by subcommittee including national statistics offices and immigration departments. Development Partners: UNWTO, PATA and ADB.	\$800,000.	Forum and Training: 2011 to 2012 Implementation: 2013 to 2015
Project 3.2: Joint Marketing of Multi-Country Mekong Branded Circuits Expected Benefits: <ul style="list-style-type: none"> Priority destinations and circuits positioned in international and regional markets Increased destination awareness Increased sale of multi-country nature and culture tourism products Increased benefits to local communities 	<ul style="list-style-type: none"> Undertake market research on multi-country tourism in the subregion Update the GMS marketing strategy and action plan to cover 2011 – 2015 Update www.ExploreMekong.org Establish the Mekong Private Sector Partners Group Establish GMS NTO Mekong Marketing groups in key markets using existing NTO offices there Undertake production of promotional materials for use at trade shows and promotional events Implement the 'Explore Mekong Campaign' targeting the travel trade, travel media, and consumers 	MTCO to lead supported by GMS NTOs, and key private sector groups such as carriers, accommodation chains, etc. Potential development partners: ADB, JICA, and PATA.	\$250,000 per year in cash (or \$1.25 million over 5 years) + in kind contributions of at least 60% of total budget.	2011 to 2015
Project 3.3: Multi-country Product Development Expected benefits: <ul style="list-style-type: none"> Increased number of tour operators offering multi-country tour products Increased tourism and revenue in priority Mekong nature and culture destinations and circuits Increased benefits to local communities 	<ul style="list-style-type: none"> Develop an action plan including budget estimation and roles of each on implementation, based on market research findings and discussions with NTOs, and PS. MTCO, NTOs and tour operators prioritize multi-country tour products Hold product development workshops in the priority Mekong nature and culture destinations Conduct familiarization tours for tour operators and the media in priority Mekong nature and culture destinations Maintain a register of multi-country tour products on Mekongtourism.org Coordinate the introduction of product standards and industry codes of conduct 	MTCO to lead supported by GMS NTOs and tour operators interested in or already operating multi-country tour products in the subregion. Potential development partners: ADB, JICA, and PATA.	\$500,000	2011 ongoing



Revised Strategy and Action Plan Elements	Description	Organizations/Roles	Budget Estimates	Timing
<p>Project 3.4: Facilitate Cross Border Travel</p> <p>Expected Benefits:</p> <ul style="list-style-type: none"> • Faster and more convenient immigration processing • Increased rate of multi-country tourism • Increased tourism and revenue in Mekong nature and culture destinations • Increased number of tour operators offering multi-country tour products 	<ul style="list-style-type: none"> • Physical and software audit of the key land border points in the priority multi-country destinations. • Preparation and financing of a physical and software improvement program. • Implementation of the improvement program • Working towards a common visa on arrival policy for non-ASEAN resident arrivals with or without electronic clearance prior to arrival. 	<p>TWG and MTCO to coordinate relevant GMS working groups and development partners such as ADB, JICA, and EU, and others.</p>	<p>10 land borders ~\$7 million</p>	<p>2012 to 2015</p>

