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75ª reunión  
Nessebar, (Bulgaria), 13 y 14 de junio de 2005  
Punto 11 del orden del día provisional

### **INICIATIVA ST-EP**

#### **Nota del Secretario General**

El propósito del presente documento es informar al Consejo Ejecutivo de las actividades realizadas para llevar esa iniciativa a la práctica.

### **INICIATIVA ST-EP**

#### **Mitigación de la pobreza por medio del turismo**

1. La iniciativa ST-EP, aprobada por la Asamblea de Beijing en 2003, comenzó sus actividades sobre el terreno a principios de 2005. Después de realizar varias misiones de exploración en 2004 para seleccionar posibles proyectos encaminados a reducir la pobreza, se eligieron dos proyectos piloto para su ejecución inmediata (véase más abajo).
2. Bajo la dirección de la OMT, la iniciativa ST-EP lleva sus actividades a la práctica por medio de dos instrumentos principales:
  - La Fundación ST-EP
  - El Fondo Fiduciario de diversos donantes para la Eliminación de la Pobreza por medio del Turismo Sostenible.

#### **La Fundación ST-EP**

3. El Secretario General ha progresado satisfactoriamente en la consecución de fondos, y ha creado la estructura organizativa para producir un sistema integrado que se someterá a la aprobación de la Asamblea General en noviembre de 2005. Se espera que la Asamblea examine y apruebe los estatutos de la Fundación, el establecimiento y la puesta en marcha de su oficina y la creación del Consejo de la Fundación, y que proporcione directrices respecto de su representación pública y del establecimiento de relaciones con otros donantes, patrocinadores y actividades operativas o de investigación conexas.
4. Conforme a lo informado en la anterior reunión del Consejo Ejecutivo en Brasil:
  - El acuerdo con la República de Corea para albergar la Fundación ST-EP de la OMT se firmó el 24 de septiembre de 2004. El primer plazo (2 millones de dólares) del total de cinco millones de dólares comprometido se depositó en una cuenta de la Fundación ST-EP de la OMT en Seúl. Se redactó un proyecto de estatutos para la Fundación, conforme a la ley coreana y a los procedimientos correspondientes de las Naciones Unidas (véase el anexo 1).
  - Se ha firmado un acuerdo con el Organismo de Desarrollo de los Países Bajos (SNV) para que colabore en proyectos ST-EP por medio de contribuciones en especie (véase el anexo 2).
  - Macao contribuyó a la Fundación ST-EP con un importe inicial de 200.000 dólares en noviembre de 2004.
  - Conforme a la decisión del Consejo, se cargó al presupuesto de Cooperación Técnica la contribución de 500.000 dólares de la OMT para financiar proyectos correspondientes a la iniciativa ST-EP.



- Se ha creado un Comité Preparatorio de la Fundación bajo la presidencia conjunta del Secretario General y del Embajador Dho, que se reunió en septiembre para estructurar el proyecto de estatutos, presupuesto y gestión. También se firmó el acuerdo de sede de la Fundación ST-EP con el Gobierno de la República de Corea (véase el anexo 3)
- La OMT ha elaborado unos procedimientos operativos para la iniciativa ST-EP, el enlace con la Fundación, los proyectos piloto y la vinculación con programas en desarrollo de lucha contra la pobreza, sostenibilidad y asistencia técnica (véase el anexo 4).
- La OMT se ha puesto en contacto con los organismos internacionales, regionales y nacionales de financiación del desarrollo, con el fin de establecer un marco de coordinación de los proyectos de desarrollo – incluidos los proyectos ST-EP– para evitar innecesarias duplicaciones totales o parciales de los esfuerzos y fomentar sinergias operativas y financieras. En octubre de 2004, se celebró en Washington una provechosa conferencia con organismos de asistencia al desarrollo, y en noviembre del mismo año tuvo lugar en Madrid una reunión de coordinación con una docena de organismos especializados de las Naciones Unidas, entre otras entidades.

5. El Grupo de Trabajo de la Fundación ST-EP de la OMT, establecido por el Consejo Ejecutivo en su 74ª reunión y compuesto por Brasil, Indonesia, Italia, Jordania y Nigeria, se reunió por primera vez en Berlín el 13 de marzo de 2005 bajo la presidencia de Corea, Presidente del Consejo Ejecutivo, inmediatamente después del tercer Foro ST-EP. El Grupo de Trabajo eligió al Ministro de Turismo de Nigeria, el Sr. Frank Nchita Ogbuewu, a su presidencia. El Grupo de Trabajo pidió a sus miembros que realizaran consultas en los continentes que representan en relación con la iniciativa ST-EP y con el proyecto de estatutos.

6. El tercer Foro ST-EP se celebró con éxito durante la ITB de Berlín, y contó con la asistencia de más de cien participantes, entre los que figuraban varios Ministros. En esa ocasión, la OMT presentó las conclusiones de su reciente estudio sobre el turismo y los microcréditos.

7. La segunda reunión de la Fundación ST-EP de la OMT tuvo lugar los días 25 y 26 de mayo de 2005 en Seúl (Corea), conjuntamente con la reunión «ASEAN +3». La presidencia del Grupo facilitará al Consejo la información correspondiente a esa reunión.

#### El Fondo Fiduciario de diversos donantes para la Eliminación de la Pobreza por medio del Turismo Sostenible

8. En diciembre de 2004, en colaboración con el Organismo de Desarrollo de los Países Bajos (SNV), la OMT lanzó un Fondo Fiduciario de diversos donantes con el objetivo de dar apoyo a proyectos ST-EP mediante la facilitación de asistencia técnica. El SNV aportó una contribución inicial de 2 millones de euros. El

Gobierno de Italia ha convenido ya en contribuir financieramente al Fondo, y están en marcha conversaciones con otros donantes potenciales.

9. A principios de abril, ST-EP inició las operaciones sobre el terreno en África Oriental y Occidental abriendo sus primeras oficinas sobre el terreno en Camerún y Etiopía. Los coordinadores regionales de ST-EP están a cargo de las oficinas ST-EP sobre el terreno, situadas en las oficinas del PNUD.

10. La OMT comenzó la operativa de ST-EP enviando misiones de selección de proyectos a Etiopía, Camerún, Zambia, República Dominicana, Haití, Malí, Viet Nam y Tanzania. Esas misiones han definido una serie de proyectos piloto ST-EP en cada país. El Secretario General visitó personalmente dos de las zonas donde es probable que se ejecuten proyectos ST-EP, en Etiopía y en la República Dominicana.

11. La OMT ha emprendido ya la ejecución de un proyecto ST-EP en Camerún y de dos en Etiopía (véase el anexo 5).

12. La Secretaría de la OMT ha seguido promoviendo el concepto de Reducción de la Pobreza por medio del Turismo, y la iniciativa ST-EP. Con ese objeto, diversos altos funcionarios de la OMT participaron activamente en los eventos siguientes:

- Cumbre Regional de Microcrédito para América Latina y el Caribe (Santiago de Chile, abril de 2005)
- Publicación de un nuevo libro sobre turismo, microfinanzas y reducción de la pobreza: recomendaciones dirigidas a las PYME y a las IMF
- Seminarios sobre turismo y reducción de la pobreza en:
  - Pakistán (abril de 2005) para la región de Asia Meridional
  - Ecuador (junio de 2005) para los países de la Comunidad Andina
  - Nicaragua (agosto de 2005) para los países Centroamericanos
- Comunicaciones en la conferencia de la PATA (Macao – abril de 2005), a cargo del Embajador Dho y del Secretario General, y en la Comisión de la OMT para África (Botswana – abril de 2005) a cargo del Presidente del Grupo de Trabajo y del Secretario General.

13. En 2005, la Secretaría de la OMT colaboró estrechamente con la Comisión de Desarrollo y Cooperación del Parlamento Europeo en la elaboración de una propuesta de resolución sobre turismo y desarrollo. Esa resolución parlamentaria propone que la Unión Europea proporcione apoyo financiero a la iniciativa ST-EP y plantee otras medidas importantes para promover el papel del turismo en la reducción de la pobreza.



**A N E X O 1**  
**UN-WTO ST-EP FOUNDATION**  
**DRAFT CONSTITUTION**

**Constitution of the UN-WTO ST-EP FOUNDATION**

**PREAMBLE**

The UN-WTO ST-EP Foundation (hereinafter referred to as "ST-EP Foundation") is an international not-for-profit foundation established under the initiative of the World Tourism Organization (hereinafter referred to as "WTO"), a Specialized Agency of the United Nations (hereinafter referred to as "UN"), to contribute to the UN Millennium Development Goals, with the aim to promote poverty elimination through sustainable tourism development that can be carried out together with the preservation of culture and the natural environment.

The ST-EP Foundation shall contribute to the safeguarding of natural and cultural heritage and to socio-economic development by cooperating with international organizations, governments and related authorities, foundations, corporations, associations and individuals who are willing to contribute to countries and mankind through the Sustainable Tourism-Eliminating Poverty Initiative (hereinafter referred to as "ST-EP Initiative").

**ARTICLE I**  
**TITLE**

The title of the foundation will be the UN-WTO ST-EP Foundation as agreed in the Memorandum of Understanding between the Ministry of Culture & Tourism of the Republic of Korea and the WTO.

**ARTICLE II**  
**STATUS AND CAPACITY**

1. The ST-EP Foundation shall operate under Korean laws, as an autonomous organization which is international in status and non-political in management, staffing and operations and shall have full juridical personality and legal capacity for the exercise of its functions and the fulfilment of its aims .

2. The ST-EP Foundation shall have the capacity to:

- (i) receive, acquire or otherwise lawfully obtain from any governmental authority or from any corporation, company, association, person, firm, foundation or other entity, whether international, regional or national, by donation, grant, exchange, bequest, purchase or lease, either absolutely or in trust, contributions consisting of such properties, real, personal, or mixed including funds and valuable effects or items, as may be useful or necessary to pursue its aims and activities and to hold, operate, administer, or use of the said assets;
- (ii) enter into agreements and contracts;
- (iii) employ persons according to its own regulations;
- (iv) institute, and defend in, legal proceedings; and
- (v) perform all acts and functions as may be found necessary, expedient, suitable or proper for the furtherance, accomplishment or attainment of any or all of the purposes and activities herein stated.

### **ARTICLE III HEADQUARTERS AND SUBSIDIARY BODIES**

The main office of the ST-EP Foundation shall be located within the Republic of Korea (hereinafter referred to as "Host Government") and if necessary, subsidiary offices may be established in locations within and outside of the Republic of Korea.

### **ARTICLE IV GUIDING PRINCIPLES**

The ST-EP Foundation provides support to countries and organizations for the conduct of research and development projects that aim at eliminating poverty through sustainable tourism development programmes and projects.

The ST-EP Foundation is a vital complementary institution which enhances the value of the WTO Sustainable Tourism Development programme for poverty elimination.

The ST-EP Foundation shall fully cooperate with the UN-WTO in determining the technical aspects and other areas of its programmes that relate to the mandate of the UN-WTO.

## **ARTICLE V ACTIVITIES AND PROJECTS**

The ST-EP Foundation shall focus on work to encourage tourism that is socially, economically and ecologically sustainable, and that contributes to eliminating poverty.

To accomplish this it may:

- 1) strengthen international cooperation and forge new relations to achieve poverty alleviation objectives through sustainable tourism development in developing countries.
- 2) conduct promotions, events, fund-raising activities and other self-financed operations to reinforce ST-EP's own image and brand
- 3) implement ST-EP projects through close coordination with the UN-WTO
- 4) support research and tourism projects that are in line with the UN Millennium Development Goals and meet UN standards
- 5) cooperate and carry out projects with countries, international organizations and associations, and corporations focusing on sports, culture, education, human resource development as they relate to poverty elimination
- 6) provide training, operational support, technical assistance, human resources development and tourism development programmes for alleviating poverty, including the identification of tourism investment opportunities and the preparation of investment plans, for developing countries
- 7) conduct research and forums linked with the public, private and international community and publish reports with their results
- 8) implement other activities in line with the aims of the ST-EP Foundation.

## **ARTICLE VI ORGANIZATION**

The organization of the ST-EP Foundation shall consist of:

1. The Board of Governors
2. The ST-EP Council
3. The Chief Executive Officer, Director General and Staff



## **ARTICLE VII COMPOSITION**

1. The Board of Governors is composed of:
  - The Chairperson of the WTO Executive Council
  - One Representative from the Government of the Republic of Korea
  - The Secretary-General of WTO
  - The Chief Executive Officer of the ST-EP Foundation
  - The Director-General of the ST-EP Foundation
  - Two members elected by the ST-EP Council, representing respectively, donors and beneficiary countries

The ST-EP Council may decide to increase the number of Governors to nine if considered necessary.

2. The ST-EP Council is constituted by considering the provision of contributions to the ST-EP Foundation. Agencies and countries that provide a minimum of US\$ one million, in cash or in kind, have the right to designate a Council member for a two-year period, renewable if the contribution is renewed.

In addition, the ST-EP Council will include:

- Senior personalities from various fields of activity with international renown
- One representative from the UN Secretary General
- One representative from the WTO Secretary General
- One representative from the host Government
- Seven representatives of the WTO Member States (one from each Regional Commission plus an additional member from Africa) representing the ST-EP beneficiary countries.

## **ARTICLE VIII FUNCTION AND POWERS**

### **1. BOARD OF GOVERNORS**

The functions of the Board of Governors in relation to the operations of the ST-EP Foundation shall be as follows:

- 1) Define ways and means to achieve the objectives of the ST-EP Foundation.
- 2) Approve plans and programmes for the implementation of its activities and projects.
- 3) Review the ST-EP Foundation's cost-effectiveness, financial integrity and transparency
- 4) Approve ST-EP budget and accounts



- 5) Appoint an external auditor and a legal advisor
- 6) Appoint the Chief Executive Officer and the Director-General of the ST-EP Foundation
- 7) Approve the organizational framework of the ST-EP Foundation
- 8) Approve personnel policies and basic salaries of the ST-EP Foundation staff.
- 9) Approve capital investment of the ST-EP Foundation
- 10) Approve the establishment of subsidiary offices of the ST-EP Foundation
- 11) Perform all other acts that may be considered necessary, suitable and proper for the attainment of the aims of the ST-EP Foundation

## 2. ST-EP COUNCIL

The ST-EP Council shall:

- 1) Establish the overall policy of the ST-EP Foundation.
- 2) Define the priorities of actions to be undertaken at different periods.
- 3) Evaluate in an over-all manner whether the ST-EP Foundation is operating in line with its objectives and implementation plans.
- 4) Provide recommendations to the Board of Governors regarding the activities of the Foundation
- 5) Promote fund-raising and resource-mobilization activities
- 6) Establish such other subsidiary committees as it deems necessary for the performance of its functions
- 7) Perform all other acts that may be considered necessary, suitable and proper for the attainment of the aims of the ST-EP Foundation

The ST-EP Council will meet at least once a year.

## ARTICLE IX PROCEDURES

### 1. BOARD OF GOVERNORS

1) The Board of Governors shall elect one member among the Governors as Chairman. The term of the Chairman shall be three years and the Chairman is eligible for re-election for subsequent terms.

2) The term for elected Governors (i.e. those representing donors and beneficiary countries) is three years. Governors may be reappointed for a second term.

3) In the case of a vacancy of one of the elected Governors by reason of their retirement, death, incapacity, or any other cause, he/she will be replaced by another person elected by the Council from the corresponding group.

- 4) The Board of Governors shall hold two regular meetings annually.
- 5) In addition, the Board of Governors may hold additional meetings at the request of three governors or at the Chairman's initiative.
- 6) When a regular or additional meeting of the Board of Governors is held, the date, location and agenda of the meeting shall be informed to all Governors and the WTO at least one month in advance.
- 7) The quorum required for the meetings of the Board of Directors is five members. Members may participate by means of video-conference technology.
- 8) The decisions of the Board of Governors shall be made by simple majority vote of the Governors present. In case of a ballot, the vote of the Chairman will decide.

## 2. ST-EP COUNCIL

- 1) The ST-EP Council shall elect at each session one of its members as Chairperson, and will continue in that position until the following session of the ST-EP Council. The Chairman will inform about the decisions taken by the Council at the following session of the Board of Governors.
- 2) The ST-EP Council shall hold one regular meeting annually and may hold additional meetings at the request of 1/3 of its members or at the Chairperson's initiative.
- 3) When a regular or additional meeting of the ST-EP Council is held, the date, location and agenda of the meeting all members and the WTO shall be informed one month in advance.
- 4) The decisions of the ST-EP Council shall be made by simple majority vote of the members present. In case of a tie, the vote of the Chairman will decide.

## **ARTICLE X CHIEF EXECUTIVE OFFICER AND DIRECTOR GENERAL**

### 1. CHIEF EXECUTIVE OFFICER

- 1) The Chief Executive Officer of the ST-EP Foundation (hereinafter referred to as "CEO") shall be appointed by the Board of Governors. The CEO shall be appointed for a term of three years and is eligible for reappointment for subsequent terms.



2) The CEO shall prepare project plans, budget and annual reports for review and approval by the Board of Governors and the ST-EP Council.

3) The CEO shall maintain close cooperation by regularly holding meetings with the UN-WTO, reporting to the General Assembly every two years, and to the WTO Executive Council if requested.

4) The CEO may sign contracts and agreements which affect the objectives, location, expansion or dissolution of the ST-EP Foundation and regarding major issues concerning the ST-EP Foundation, with prior approval from the Board of Governors.

## 2. DIRECTOR-GENERAL

1) The Director-General of the ST-EP Foundation (hereinafter referred to as "Director-General") shall be appointed by the Board of Governors in consultation with the Host Government. The term of the Director-General is three years. The Director-General is eligible for reappointment to subsequent terms.

2) The Director-General shall see to it that the objectives of the ST-EP Foundation are carried out efficiently and shall be responsible for the daily operation and management of the ST-EP Foundation.

3) The Director-General may sign legal documents that are necessary to ensure the normal operation of the ST-EP Foundation and as the occasion demands, major issues shall be subject to approval by the CEO.

4) The Director-General shall assist the CEO in the exercise of his/her functions and powers.

## ARTICLE XI STAFF

1. The Staff shall be appointed by the CEO upon the recommendation of the Director General.

2. The paramount consideration in the employment of staff and in the determination of the conditions of work shall be the highest standard of quality, integrity, efficiency, and competence.

3. Salary scales, insurance, pension schemes and other terms of employment shall be laid down in staff regulations, and shall in principle be internationally competitive and comparable with those of the United Nations and affiliated institutions and other relevant international organizations.

## **ARTICLE XII FINANCING**

1. The budget of the ST-EP Foundation shall be funded by states, international organizations, corporations, individuals and other public or private institutions that voluntarily contribute with cash contributions, endowments, dues and allotments.
2. The budget of the ST-EP Foundation shall be appropriated with the legal fruit from the assets and the contributions, endowments and income from the fund appropriation projects and other projects.
3. The financial operations of the ST-EP Foundation shall be governed by financial regulations adopted by the Board of Governors.
4. An annual audit of the operations of the ST-EP Foundation shall be conducted by an independent international accounting firm appointed by the Board of Governors. The audit report reviewed by the Board of Governors shall be reported to the ST-EP Council and the UN-WTO.
5. No part of the funds of ST-EP shall be used to the benefit of, or be distributable to, members of the ST-EP Council, Governors of the Board of Governors, CEO and ST-EP's staff and other private persons, except that ST-EP shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments in furtherance of its aims. The travel and associated expenses of the Governors to attend Board meetings may also be covered by the Foundation.

## **ARTICLE XIII ACCOUNTING**

### **1. Asset Categorization**

- 1) The assets of the ST-EP Foundation shall be divided into permanent assets and operating assets.
- 2) The following will be considered as permanent assets and the rest will be operating assets:
  - i) Asset contributed as permanent assets when the Foundation was established
  - ii) Assets acquired through contribution or without compensation
  - iii) Assets declared by the Board of Governors as permanent assets



2. Asset Management

The maintenance, preservation and management of permanent property is subject to the decision of the Board of Governors.

3. Asset Evaluation

Evaluation of the all the assets of the ST-EP Foundation shall be effected at the market price of the asset when it was acquired, provided that if the asset was re-valuated, than it shall be done as the re-valuated value.

4. Operating Financial Resource

Operating assets, legal fruits of permanent assets, business income and other income shall appropriate the expenses required to maintain and run the ST-EP Foundation.

5. Categorization of Accounting

The Accounting of the ST-EP Foundation shall be divided into General Project Accounting and Goal Project Accounting

6. Accounting Principle

The Accounting of the ST-EP Foundation shall be in accordance with the International Accounting Standard.

7. Fiscal Year

The Fiscal Year of the ST-EP Foundation shall be the same as that of the Host Government.

#### **ARTICLE XIV ST-EP ADVISORY COMMITTEE**

1. The WTO Committee on Sustainable Development of Tourism will act as ST-EP Advisory Committee.

2. The ST-EP Advisory Committee will advise on technical issues and report on their deliberations to the ST-EP CEO and ST-EP Council.

## **ARTICLE XV PRIVILEGES AND IMMUNITIES**

1. The ST-EP Foundation may conclude with the Host Government and other states that suit its goals agreements relating to the facilities, privileges and immunities that are granted to individual members of the Foundation i.e., Governors, the CEO , the Director- General, staff of ST-EP and the experts performing missions on behalf of the ST-EP Foundation for the purpose of exercising official duties.

2. The privileges and immunities are granted in the interest of the ST-EP Foundation and not for personal benefit.

## **ARTICLE XVI RELATIONSHIPS WITH OTHER ORGANIZATIONS**

In order to achieve its objectives in the most efficient way, the ST-EP Foundation may enter into agreements for cooperation with relevant countries, regions, international organizations, both public and private foundations and associations.

## **ARTICLE XVII AMENDMENTS**

The Constitution may be amended by the Board of Governors by a 2/3 majority of the members present and voting. The proposed amendments of the Constitution together with its full text shall be notified to all the Governors at least two weeks in advance of the Board of Governors meeting.

The amended Constitution with the approval of the Board of Governors shall be submitted to the ST-EP Council for approval by a 2/3 majority of the members present and voting.

## **ARTICLE XVIII DISSOLUTION**

The ST-EP Foundation may be dissolved by a  $\frac{3}{4}$  majority of all voting members of the ST-EP Council, if it is determined that the purposes of the ST-EP Foundation have been achieved to a satisfactory degree or if it is determined that the ST-EP Foundation will no longer be able to function effectively.

In the case of dissolution, any land, buildings and movable assets situated on the territory of the host government, shall revert to the host government. Other assets of the Foundation shall be used for similar purposes or distributed to institutions having purposes similar to those of the ST-EP Foundation.



**A N E X O 2****MEMORANDUM OF UNDERSTANDING****BETWEEN****WTO – WORLD TOURISM ORGANIZATION****AND****SNV – NETHERLANDS DEVELOPMENT ORGANIZATION****Introduction**

The mission of the **World Tourism Organization** (WTO) is to promote and develop sustainable tourism as a significant means of fostering international peace and understanding, economic development and international trade. Sustainable tourism is a form of tourism that respects the environment and cultural values and stimulates an exchange of experiences between peoples of the world. In the context of development it is important to recognize that sustainable tourism is to have a positive impact on the reduction of poverty.

At the World Summit for Sustainable Development in Johannesburg, WTO launched the ST-EP (Sustainable Tourism – Eliminating Poverty) Initiative which will focus on longstanding work to encourage tourism development that is sustainable – from the social, economic and ecological points of view – and which specifically alleviates poverty, bringing development and jobs to people living on less than a dollar a day. It will target the world's poorest countries, particularly in Africa and developing states in general.

**SNV – Netherlands Development Organization** is a Dutch development assistance organization focusing on the provision of advisory services to meso-level organizations in developing countries with the broad objectives to improve organizational and institutional capacities, improve local governance and reduce poverty.

SNV – Netherlands Development Organization has a proven track record in working in various developing countries on sustainable tourism activities including the support of the national tourism authorities, local businesses and the elaboration of strategic and operational sustainable tourism development programs.

**Purpose**

The purpose of this Memorandum of Understanding is to document and substantiate the already existing working relationship between WTO and SNV, as well as to serve as a guideline for expanding the working relationship of the WTO and the SNV, with a view to help increase overall efficiency and effectiveness in each organisation's field of operation, with specific reference to pro poor sustainable tourism in developing countries. Both organizations are committed to work together on various programs to strengthen the impact of their actions with a final objective to contribute to poverty reduction.

**Scope**

The MOU includes all activities in which WTO and SNV can achieve mutual synergy and increased effectiveness, with specific reference to activities in the field of sustainable tourism.

Specific references for the entire duration of the MOU is made to the following areas of cooperation:

**1. Programmatic operations –**

While both organisations will continue to establish their own operations with regard to sustainable tourism in favour of the poor in developing and least developed countries, this MOU underscores the commitment of the organisations to engage into joint action wherever and whenever possible. Special reference is made to the current SNV regional pro poor sustainable tourism activities in West Africa, East Africa, Southern Africa, South – East Asia, The Himalayan region, the Andes / Amazon region as well as the mid-American region. Any planned WTO – ST-EP mission or project in these regions and countries will be communicated in advance to SNV and vice-versa, in order to seek adequate coordination and/or joint actions.

**2. Knowledge management and dissemination –**

Both organisations will continue to develop their own knowledge base, as well as providing their knowledge services to governments, NGOs and other agencies interested in sustainable tourism. This MOU underscores the commitment of the organisations to engage in stronger cooperation in knowledge management and dissemination. As a matter of priority; each organisation will invite the other for participation in relevant workshops, seminars, meetings; the possibilities to establish a joint website will be explored; joint studies to improve the knowledge base may be undertaken; cross-referencing to each other's relevant publications will be taken on as a matter of compliance; distribution of each other's publications will be explored.



### 3. Resource mobilisation –

Each organisation depends – to some extent – on resources provided by third parties. As soon as feasible, joint action to mobilise additional resources for joint activities will be planned and undertaken. Specific reference is made here to the ST-EP programme of WTO, to which SNV feels committed.

### 4. Human resource management –

Both organisations have a professional and qualified set of technical advisors and network of consultants. Where feasible and relevant, each other's advisory capacity will be deployed.

### 5. Financial management –

This MOU does not include financial commitments between the two organisations, although these could be explored in the future. For each activity or series of activities that may result from the execution of this MOU, separate contractual agreements will be applied. In principle, each organisation will cover the cost of inputs in workshops, seminars and identification missions from its own means, whereas financial arrangements on a cost-sharing basis can be made for technical assistance inputs in the implementation of ST-EP programs.

## **Contact persons**

For the purposes of this MoU, the following focal points are designated by each organization:

WTO: Mr. Eugenio Yunis, Chief, Sustainable Development of Tourism Department

SNV: Mr. Marcel Leijzer ,Private Sector Development & Tourism Officer,

## **Duration and Termination of the MOU**

This MOU becomes effective on the date of signature by both parties. Either party, upon a 90-days written notice to the other party, may terminate the agreement, without liability, at any time and for any reason it deems convenient. Unless earlier terminated, this MOU remains in effect for a period of three years from the date of signature.

## **Reconciliation of disagreements**

Any disagreement will normally be resolved amicably at working level. If this is not possible, the focal points will seek to settle the issue and ensure a mutually satisfactory solution. Senior management of both parties will be involved as necessary.



**Review of the MOU**

The MOU will be reviewed for accuracy an on annual basis and if necessary following pertinent changes in policies, procedures and structures of the parties involved. Review of this agreement may be instigated by either organisation.

**Signatories**

The signing of this MOU implies that the signatories will strive to reach, to the best of their ability, the objectives stated in the MOU.

On behalf of the Organisation I represent, I wish to sign this MOU and contribute to its further development.

WTO  
World Tourism Organisation

SNV  
Netherlands Development Organisation

Francesco Frangiali  
Secretary General  
Date:

Dirk Elsen  
Director  
Date:

**A N E X O 3****AGREEMENT**

**BETWEEN THE WORLD TOURISM ORGANIZATION  
AND THE MINISTRY OF CULTURE AND TOURISM  
OF THE REPUBLIC OF KOREA  
ON THE ESTABLISHMENT OF THE UN-WTO ST-EP FOUNDATION  
HEADQUARTERS**

The World Tourism Organization (hereinafter referred to as "WTO") and the Ministry of Culture and Tourism of the Republic of Korea (hereinafter referred to as "MCT");

Recalling the Memorandum of Understanding (MOU) concerning the establishment of the ST-EP Foundation and its Headquarters, subscribed between WTO and MCT, which was signed in Korea on 25 March 2004 with the aim to encourage international cooperation on sustainable tourism development for poverty elimination;

Welcoming the decision on the 'ST-EP Initiative' adopted by the WTO Executive Council at its 73<sup>rd</sup> session held in Hyderabad, India, on 7 and 8 July 2004;

Acknowledging that the coordination of opinions of related authorities and the drawing up of the plan for the Foundation's establishment is being led through the ST-EP Preparatory Committee, which is jointly spearheaded by the WTO Secretary General and the Cultural Cooperation Ambassador of Korea;

Having regard to the matters agreed between WTO and MCT in the MOU and, in particular, the establishment of the Foundation Headquarters during 2004 with support from the Korean Government, and other detailed implementation measures with the support of WTO;

Have agreed as follows:

## **Article 1**

### **Establishment of the Foundation**

1. The official title of the Foundation is "UN-WTO ST-EP Foundation (Sustainable Tourism-Eliminating Poverty Foundation)".
2. The ST-EP Foundation will be established in 2004 as an international foundation with a legal personality status under Korean laws, by virtue of this Agreement.
3. The ST-EP Foundation shall be fully compatible with international laws and will have the capacity to stand alone, while retaining links with WTO, its founder. ST-EP related projects and research initiated by WTO during 2004 and 2005, shall be transferred to the ST-EP Foundation at the beginning of 2006 when the Foundation will be fully operational.
4. Detailed matters including the internal organization of the Foundation, its function and powers, procedures, financing and accounting shall be defined in the ST-EP Foundation Constitution attached hereto, subject to final approval by the WTO General Assembly at its XVI session in 2005.

## **Article 2**

### **Support by Korea and WTO**

1. MCT will pay the ST-EP Foundation a seed fund of USD \$5 million, as promised in the MOU, as follows:

<b>Payment Date</b>	<b>Amount (USD)</b>	<b>Payment Account</b>
<b>8 Oct 2004</b>	\$2 million	WTO Temporary Account
31 Mar 2005	\$1 million	ST-EP Foundation Account
31 Mar 2006	\$1 million	ST-EP Foundation Account
31 Mar 2007	\$1 million	ST-EP Foundation Account



The schedule above may be amended by mutual agreement between WTO and Korea in line with the progress of the ST-EP project.

2. WTO recognizes that opening a temporary account for ST-EP within Korea is necessary for the establishment of the Foundation. Therefore it will open a WTO ST-EP Temporary Account in Korea, and the MCT will transfer the seed fund of USD \$2 million to this account, which will subsequently be transferred into a ST-EP Foundation account when it is legally established. The contribution of USD \$500,000 that was promised to be provided by WTO in accordance with the MOU and with the approval of the WTO Executive Council, will be deposited in another WTO ST-EP Temporary Account in Madrid by 8 October 2004, until final approval for its application to ST-EP activities is obtained from the WTO General Assembly in 2005. The interest receipts from the paid funds shall be accumulated in the WTO Temporary Accounts and shall be transferred together with the funds when both are transferred to the ST-EP Foundation Account.

3. Upon opening the accounts mentioned in the above paragraph, in Madrid and in Korea respectively, WTO and the ST-EP Foundation shall notify the other party respectively.

4. All financial statements shall be denominated in US dollars and any change in the currency shall be made only with the agreement between WTO and MCT.

### **Article 3**

#### **Other provisions**

1. The provisions and conditions herein shall be amended or prolonged only by written consent made between the two parties.

2. This Agreement shall come into effect with the signing of both parties and the moment the first fund payment is made to the WTO Temporary Account in accordance with the payment schedule laid out in Clause 1 of Article 2.

IN WITNESS WHEREOF, the undersigned, being duly authorized representatives, have signed this Agreement in Seoul in duplicate in the Korean and English languages on 24 September 2004.

For the Ministry of Culture  
and Tourism of the  
Republic of Korea

For the World Tourism  
Organization

Mr. Chung Dong-chea  
Minister

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Mr. Francesco Frangialli  
Secretary General

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Attached : UN-WTO ST-EP Foundation Constitution (subject to approval by the WTO General Assembly in 2005)

## A N E X O 4

### PROVISIONAL GUIDELINES FOR THE FUNDING AND IMPLEMENTATION OF ST-EP PROJECTS AND ACTIVITIES

These guidelines refer to projects and activities to be undertaken by the ST-EP Foundation. The Foundation is an **international not-for-profit foundation** established under the initiative of the World Tourism Organization to contribute to the UN Millennium Development Goals, with the **aim to promote poverty elimination through sustainable tourism development**.

WTO, as main sponsor and founder, will propose these guidelines to the Foundation's Board of Governors at its first meeting, as well as the necessary governance and budgetary norms in order to meet accepted UN norms.

ST-EP focuses on longstanding work to encourage sustainable tourism - social, economic and ecological - which specifically alleviates poverty, bringing development and jobs to people living on less than a dollar a day. It will target the world's poorest countries.

The ST-EP Foundation will work **in close cooperation with WTO, coordinating its research and project activities with WTO's Departments. It will also cooperate** with other international organizations, development agencies, governments, foundations, corporations, associations and individuals willing to contribute to poverty alleviation through sustainable tourism.

The ST-EP Foundation will provide technical, advisory and financial **support** to countries and organizations for conducting research and **development projects** that aim at eliminating poverty through sustainable tourism development programmes and projects.

#### **ST-EP scope of action**

Through the ST-EP Foundation, the World Tourism Organization seeks to identify and directly support innovative and sustainable tourism projects/programmes that specifically have an impact on poverty alleviation and benefit the poor.

The ST-EP Board of Governors will define every year, depending on availability, the amount of funds it intends to award per year, for both, a) development projects and b) research activities.



### **A) Preliminary Eligibility Criteria for ST-EP development projects**

The basic characteristics of ST-EP projects are the following:

ST-EP projects must have as main objective the reduction of poverty in a given area.

ST-EP projects are generally small-medium scale projects, preferably run by, or with a clear involvement of, local poor people.

ST-EP projects must **deliver tangible and measurable results**. A quantified estimate of the number of poor people or families that will benefit from the project must be provided.

ST-EP projects must be **sustainable** and should not indefinitely depend on external funding. Financial and commercial viability prospects must be demonstrated.

ST-EP projects not only deliver results, but also have the **potential to be expanded or replicated elsewhere**.

ST-EP funding is open to project proposals coming from all types of organizations, including municipal, regional and central governments, NGOs, Civil Society Organizations (CSOs), multilateral and bilateral development agencies, private foundations, universities and schools, private sector groups, individuals, and local associations.

Proposals will be screened to ensure that they conform to the following criteria:

1. **Theme:** Proposals must refer to the theme of Sustainable Tourism for Poverty Alleviation in any tourism or tourism-related area.
2. **Implementing organization and partnerships:** Proposals must be submitted clearly indicating the name of the organization responsible for implementation. The ST-EP Foundation is particularly interested in proposals from local organizations from developing countries. Proposals from international organizations will be considered eligible only if their implementing partner is a local organization. Private businesses and individuals must include a non-profit partner such as an NGOs/CSOs, multilateral/bilateral development agency, foundation, university/school, or government. Youth groups and organizations working with indigenous communities are encouraged to apply.

Central, regional and local government agencies are encouraged to apply in partnership with one of the organizations mentioned above.

3. **Implementation time frame.** Proposed activities must be completed within two years of receiving initial disbursement from ST-EP Foundation.

4. **High potential impact on poverty reduction/Results:** The output or results outlined in the proposals should be measurable and demonstrate a direct impact in improving the living conditions (i.e. reducing poverty levels) of the population in a given area.
5. **Sustainability.** Project proposals must demonstrate financial sustainability and commercial viability. ST-EP financed projects should not indefinitely depend on external funding.
6. **Maximum award size:** The maximum award size will be XX per cent of the total cost of the proposed project. Award will vary in size according to the needs outlined in the proposals.
7. **Geographical criteria:** Eligible projects should be for implementation in:
  - Any of the 49 LDCs
  - Rural areas and Small Islands Developing States (SIDS)
  - Regions or geographical areas under particular poverty conditions within developing non-LDC countries.

**Type of projects subject to ST-EP financing.** ST-EP Foundation is aiming to support:

- Concrete/ single operational projects.
- Project elements that refer to either:
  - Final feasibility study of a new commercial tourism company or operation to be owned an/or run by local communities.
  - Technical assistance to NGOs, SMEs, Local Communities or CSOs for the preparation of project's loan/grant applications to financing institutions.
  - Market analysis and opening up of marketing channels for these companies, including promotional brochures, familiarization trips for tourism operators, etc
  - Capacity building for local communities for the enhancement of their technical capabilities related to the development and management of commercial tourism projects.
  - Complementary tourism infrastructure vital for the success of such commercial tourism companies.
  - Support to ensuring the necessary coordination among different public and private stakeholders that is required for the success of new, pro-poor tourism products – i.e. through the funding and appointment by ST-EP of a "field facilitator". ( NEED CLARIFICATION )
  - Establishment of a locally run management unit for ST-EP projects, to oversee project execution, ensure that benefits are evenly distributed among the poor local stakeholders, examine ways of extending the project coverage to neighbouring areas, coordinate with local authorities and similar tasks. ( NEED CLARIFICATION )



Basic infrastructure projects will not be funded by ST-EP, but technical justification documents could be prepared by ST-EP for these projects for submission to the relevant government or international agencies.

### **Assessment Criteria**

Proposals will be assessed according to the following criteria:

- **Potential high impact on poverty reduction.**
- **Sustainability** (organizational, financial, economic, socio-cultural and environmental as relevant):  
Sustainability could consists of three main factors:
  - 1) Organizational sustainability. Implementing organizations should demonstrate a track record or experience in the field the project. They should also display a capacity to grow and continue their operations, and
  - 2) Financial/Economic sustainability. The organization or the project should demonstrate the potential to be self-perpetuating in the medium-to long-term. This strategy will differ depending on the type of project.
    - A) For revenue-generating projects, a realistic path to revenue breakeven should be included. If breakeven is not expected by the end of ST-EP support, the strategy for external donor or investor support should be stated.
    - B) For projects that do not generate any income or revenue, the proposal should provide a realistic strategy for funding project activities after completion of ST-EP support from sources such as other donors, private foundations, government agencies, etc.
  - 3) Environmental and socio-cultural sustainability. The project proposal should demonstrate how the project would contribute to environmental and socio-cultural conservation or enhancement, and would not generate negative impacts upon the local natural and socio-cultural environment.
- **Realism and Results/Outcomes:** The project's concept/design should produce tangible outputs and outcomes that are in alignment with the project's financial resources, team/organizational capability, and partnerships. The proposal should clearly identify the result that the project is seeking to obtain and demonstrate how the proposed activities can realistically achieve the intended objectives/outcomes. Although implementation plans will be brief due to proposal length, they must nonetheless convey a sense of solid organizational underpinning with the capacity to implement the project in the two-year implementation period. The budget should be sufficient to support all proposed activities.
- **Replicability and Scaling up:** ST-EP's philosophy is that outstanding development concepts should make a broader impact beyond the immediate area of the project. A project idea may have an element of



potential for transferability to other situations or to elsewhere. This impact can be achieved in several ways, including:

**Replicability** – refers to whether a concept can be adopted by other groups. For example, a project that deals with a problem in a tourism destination or site could be used to address the same problem in other sites within that country or in other countries.

**Scalability** - refers to whether a concept or idea can be applied to benefit more poor people, more quickly. ST-EP is keen to identify and support projects that have the potential to be implemented on a large scale. For example, a local project that can be expanded or taken to a provincial, regional, or national level.

- **Adoption of one or more of the seven approaches for reducing poverty through tourism**, presented in the WTO publication “Tourism and Poverty Alleviation: Recommendations for Action”:

- Employment of the poor in tourism enterprises.
- Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor.
- Direct sales of goods and services to visitors by the poor (informal economy).
- Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises (MSMEs), or community based enterprises (formal economy)
- Tax or levy on tourism income or profits with proceeds benefiting the poor.
- Voluntary giving/support by tourism enterprises and tourists.
- Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors.

## **B. Preliminary Eligibility Criteria for ST-EP Research Proposals**

*The ST-EP Foundation is seeking to promote **research activities** with the purpose of identifying linkages, principles and model applications regarding the contribution of tourism to poverty alleviation. ST-EP intends to mobilize, intensify and focus existing research mechanisms both within the tourism community and with non-tourism social science networks. ST-EP will promote and coordinate research undertaken by different, external research and academic institutions established in countries that are contributing to ST-EP foundation.*

The overall objectives of ST-EP research grants program are to:

- Mobilize the best available scientific expertise, including non-governmental organizations and the private sector to identify best practices, principles and model applications on sustainable tourism with high potential to reduce poverty.

- Promote research partnerships and collaboration that maximize complementarities among different institutions, disciplines, or countries.
- Make research more demand-driven by involving clients (i.e. potential beneficiaries of ST-EP) in setting priorities, and financing, executing, and evaluating research.
- Improve research quality and innovation by selecting projects based on rigorous technical review of scientific merit, sound work plans, and expected results.

The basic characteristics of ST-EP research projects are the following:

ST-EP research projects must have as main focus the **reduction of poverty through sustainable forms of tourism**.

ST-EP research projects must attempt to enhance the knowledge and specially the quantification of poverty reduction through tourism, thus providing further evidence to governments and funding agencies.

ST-EP funding for research is open to proposals coming from all types of organizations, including municipal, regional and central governments, NGOs, Civil Society Organizations (CSOs), multilateral and bilateral development agencies, private foundations, universities and schools, private sector groups, individuals, and local associations.

Proposals will be screened to ensure that they conform to the following criteria:

1. **Theme:** Research proposals must refer to the theme of Sustainable Tourism for Poverty Alleviation in any tourism or tourism-related area. The research proposal could take into account the **approaches for reducing poverty through tourism**, presented in the WTO publication "Tourism and Poverty Alleviation: Recommendations for Action". However, research proposal may also refer to finding new approaches for the same objective of reducing poverty.
  - Employment of the poor in tourism enterprises.
  - Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor.
  - Direct sales of goods and services to visitors by the poor (informal economy).
  - Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises (MSMEs), or community based enterprises (formal economy)
  - Tax or levy on tourism income or profits with proceeds benefiting the poor.
  - Voluntary giving/support by tourism enterprises and tourists.



2. **Implementation time frame.** Proposed research activities must be completed within one year of receiving initial disbursement from ST-EP Foundation.
3. **Action/result oriented research.** Research proposals should be action oriented – focusing on the high potential impact of tourism initiatives towards poverty reduction in a given area.
4. **Priority will be given to research identification of best practices to showcase and replicate.**
5. **Maximum award size: XXX**
6. **Geographical criteria:** Eligible research initiatives should refer to/ or be relevant to:
  - Any of the 49 LDCs
  - Rural areas and Small Islands Developing States (SIDS)
  - Regions or geographical areas under particular poverty conditions within developing non-LDC countries.

The World Tourism Organization and the STEP Foundation will, at the beginning of each year, invite research and academic institutions to present research project proposals, specifying the priority areas for that particular period.

Priority areas of research for the 2005-2006 period are:

- 1) Investigations to provide evidence of the contribution of tourism to poverty alleviation in or around World Heritage Sites, or for identifying the obstacles for maximising such contribution.
- 2) Investigations regarding the net contribution of tourism to enhance living standards of poor local communities involved in ecotourism activities in LDCs.



**PROJECT PROPOSAL FOR SUBMISSION**  
**TO WTO-ST-EP FUNDING**

The **World Tourism Organization (WTO)** is vested by the United Nations with a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, with the aim of contributing to economic development, international understanding, peace, prosperity and universal respect for, and observance of, human rights and fundamental freedoms. In pursuing this aim, the Organization pays particular attention to the interests of the developing countries in the field of tourism.

The **ST-EP Foundation** is an international not-for-profit foundation established under the initiative of the World Tourism Organization to contribute to the UN Millennium Development Goals, with the aim to promote poverty elimination through sustainable tourism development that can be carried out together with the preservation of culture and the natural environment. ST-EP focus on longstanding work to encourage sustainable tourism - social, economic and ecological - which specifically alleviates poverty, bringing development and jobs to people living on less than a dollar a day. It will target the world's poorest countries.

The ST-EP Foundation provides support to countries and organizations for conducting research and development projects that aim at eliminating poverty through sustainable tourism development programs and projects.

ST-EP financed projects must have as main objective the reduction of poverty. A quantified estimate of the number of poor people or families that will benefit from the project must be provided.

ST-EP projects must be sustainable and should not indefinitely depend on external funding. Project proposals must demonstrate financial and commercial viability.

In deciding about funding to projects, ST-EP will take into account whether the candidate proposals adopt one or more of the seven approaches for reducing poverty through tourism, presented in the WTO publication "Tourism and Poverty Alleviation: Recommendations for Action".

## **I. BASIC PROJECT INFORMATION**

<b>Title of Project proposal</b>	Identify the title of the proposed project. The title should carry an indication of the objective you intend to achieve. Avoid using general titles such as "Sustainable Environment Project"
<b>Component/Activity Title:</b>	If applicable, identify the main project to which this project is a component
<b>Country/es of implementation</b>	Identify the country/es where this project will be implemented
<b>Project duration</b>	Estimate how many months or years it will take to implement this project. (Please note that maximum implementation activities funded by ST-EP is 24 months?)

## **II. PROJECT DETAILS**

**1. Project Objectives:** Please specify the main objective of the project and the concrete results it aims to achieve. Explain how the project seeks to reduce poverty.

**2. Project justification:** Please explain what is/are the problem(s) the project tries to solve and why is it important.

Identify the problem that your project seeks to resolve or alleviate. Explain why solving this problem should be viewed as a priority?

**3. What is the strategy/concept to achieve the stated objectives described above? Why have you chosen this specific approach?**

How will the project have direct impact in reducing poverty?

**4. Implementation:** how do you intend to implement the project? Describe the activities the project will undertake to realize its objective(s)

Describe the activities the project will carry out with the ST-EP funding. Include the length and scope of such activities

**5. Beneficiaries.** Who are the target beneficiaries of the project?

Describe the primary and secondary beneficiaries of the project.

**6. How will the project reach the poor? Is the spending associated with tourism in the area reaching the poor? Please explain.**



Bellow are seven different ways in which the poor can benefit directly or indirectly from tourism. Please indicate which of the below approaches are adopted into the proposed project strategy:

- ☐ Employment of the poor in tourism enterprises: Please specify number.
- ☐ Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor: Please detail goods and services and estimate quantity.
- ☐ Direct sales of goods and services to visitors by the poor (informal economy): Please detail goods and services and estimate quantity.
- ☐ Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises (MSMEs), or community based enterprises (formal economy): Please indicate what types of enterprises and number of people involved.
- ☐ Tax or levy on tourism income or profits with proceeds benefiting the poor: Please specify.
- ☐ Voluntary giving/support by tourism enterprises and tourists: Please specify.
- ☐ Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors: Please specify and indicate who will provide or fund such infrastructure.

7. Outcomes/Results: What are the expected outcomes/results of your project? How will you measure the impact of these outcomes/results?

Outcomes are the desired result or effect that the project hopes to achieve. STEP projects must have as one important outcome the reduction of poverty. A quantified estimate of the number of poor people or families that will benefit from the project must be provided.

**8. Sustainability. How do you intend to ensure the sustainability of the project after external funding is terminated?**

Describe how the project will be financial and commercially viable in the mid-term without external funding.

### ***III. Project management arrangement***

Please describe:

1. The roles and responsibilities of all institutions involved
- 2. The composition of the program team and who will be responsible for doing what and when**
- 3. The arrangements for preparing and updating work plans**
- 4. The mechanism for sound financial accounting and timely and accurate reporting**
- 5. The agreements between the designated institution and STEP/WTO.**



#### IV. PROJECT REVIEW, MONITORING AND EVALUATION

Please describe:

1. **The mechanisms that will be used to monitor and evaluate the project.**
2. The schedule for when these monitoring actions have to be carried out and who is responsible e.g. for preparing reports and convening meetings
3. The resources allocated for substantive review meetings among stakeholders at least once a year to revalidate or adjust the objectives, outputs, activities or inputs.
4. **How the work plan and budget will be updated**

#### V. EXPECTED OUTPUTS AND WORK PLAN

THE WORK PLAN (I) SHOWS THE ACTIVITIES TO BE CARRIED OUT IN RELATION TO EACH OUTPUT OVER A PERIOD OF AT LEAST TWELVE MONTHS. IT SHOULD BE UPDATED AT LEAST ONCE A YEAR. ( II) IT IS PREPARED BY THE DESIGNATED INSTITUTION IN CONSULTATION WITH THE OTHER STAKEHOLDERS

Intended Outputs	Output Target	Indicative Activities	Inputs

#### VI. COSTS AND FUNDING SOURCES

*Tentative breakdown of prices by activities/components (consultancies, travel, translation, papers, fees, etc).*

Summary of provisional amount requested for the project and breakdown by activities

Activities/Components	Estimate uration (#Months )	Estimated Total Costs (US\$)	SOURCES OF FUNDING	
			Funding requested from ST-EP (US\$)	Funding from other sources - Please specify source in each case (US\$)
		Xxxxxx	Xxxxx	Xxxxx
		Xxxxx	Xxxxx	Xxxxx
<b>TOTAL</b>		<b>XXXX</b>	<b>XXXX</b>	<b>XXXX</b>

**VII. CONTACT INFORMATION****Name (Last, First)**

List last and first name of the person who will be the primary contact with ST-EP Team.

**Position at the Organization**

Identify your position or role within your organization.

**Organization**

Indicate name of your organization if any, or the organization sponsoring the proposed project. Do not use acronyms or initials.

Unit within organization

If you belong to a large organization, please specify in which division, department or unit you are located.

**Organization type:** Identify the type of organization, which is applying for funding to carry out this project. Please select only one:

- ☐ Development Agency (Bilateral or Multilateral)
- ☐ Foundation
- ☐ Central Government
- ☐ Local or Regional Government
- ☐ Non-Governmental Organization
- ☐ Private Business
- ☐ Individual
- ☐ Community organization
- ☐ Academic institution

Primary Email

Provide the most reliable e-mail address available. The ST-EP team will correspond with applicants primarily via e-mail. Failure to provide a working address may prevent you from receiving our messages or notifications. Indicate secondary e-mail address if available. This address will only be used if we are unable to reach you via the primary e-mail.

Secondary EmailOrganization website

If your organization has an active website, kindly provide the link or address. Otherwise, leave blank.

**Telephone**

List most reliable telephone number. Include country code, area code and extensions as necessary.

**Fax:**

List most reliable telephone number. Include country code and area code.

**Address**

Provide a mail address. If possible, use street number and names in place of postal boxes. Include city, state or province, postal code, and country, as they should appear in any document

**City** addressed to your organization.  
List city here although it appears in your address above

**State/Province** List state or province here although it appears in your address above. Leave this blank if your address does not have a state/province.

**Country** List country where your organization or office is based

**Postal code** List postal code here although it appears in the address above.

**Date Established** List the year in which your organization was established

**Describe your organization:**  
Briefly describe the field or industry of your organization and identify some of the services or products it provide

#### **VIII. PARTNERS IN THE PROJECT ( if any)**

Please list Names of Institutions/Partners with whom you plan to work with.



## ANEXO 5

### PILOT PROJECTS TO PERFORM IN ETHIOPIA

#### **Project 1. Rural community-based tourism project**

This project is about extending the length of stay in the Lalibela area and spreading visitor spending to poor rural communities.

The guidebooks confirm the attractiveness of the surrounding countryside and the many fascinating heritage sites off the beaten track. The project would involve identifying, providing and promoting opportunities for add-on visits from Lalibela for one day to three (or possibly more) days. These might be daytime visits or involve overnights.

The project will entail:

- Undertaking an audit and mapping exercise of the villages, historic sites, key natural features and inter-linking tracks that can be visited in one to three days from Lalibela, including their level of potential interest.
- Working with tour operators to determine possible levels of future demand, types and lengths of programme, group size and pricing policies.
- Discussion with identified communities about their interest in participation and services that they might provide to tourists, including visits to see way of life, events and ceremonies, provision of porters, guides and mules, provision of food and simple accommodation. Avoiding false expectations.
- Working with the communities to develop appropriate facilities and services. This will be done carefully, involving traditional community structures, seeking to ensure participation by women etc., and ensuring local ownership. It will also involve appropriate capacity building and skills training.
- Developing information and promotional material around the offers, and undertaking marketing directly and in conjunction with tour operators. Promoting information about the excursions in Lalibela.

During the mission we met an NGO called 'Tourism in Ethiopia for Sustainable Future Alternatives' (TESFA) which has established an accommodation facility in the rural community of Meket in the neighbouring Woreda to Lalibela and has a proposal to work with other communities near to Lalibela. The accommodation facility is very simple, based on a set of traditional round tukuls for the eating place, bedroom(s) and toilet. Great care was taken to ensure community ownership of the facility, working with the local parish committee

while also seeking to encourage participation by women. They could provide the basis for moving forward, using this model.

A target of 7 participating villages, with 3 developing accommodation structures and the rest providing visits or other services, could be set for the programme.

## **Project 2. Enterprise support and supply scheme**

This scheme is about developing more small enterprises and suppliers servicing tourists and the tourism industry locally in Lalibela, increasing quality and efficiency and income retained. There are three components: handicraft production; increasing local supplies to businesses; and strengthening informal tourism service provision.

### **i. Handicraft production**

Some handicrafts are being made in Lalibela. We were aware of silver and other metal work (particularly hand cut crosses), icon painting on leather, and the making of leather goods such as belts. For some items we were told that demand outstrips supply. There is a need and an opportunity to increase quantity and quality of local manufacture, and to promote sales to tourists. The project will involve:

- A full audit to identify what is being made locally, including an assessment of needs and potential of the suppliers.
- Consideration of possible new items that could be added to the range. In particular there is a need to take closer account of tourist demand in terms of most popular types of product, size, weight, price range etc. Reflecting local heritage themes is important, as is style. A generic Ethiopia-wide tourism handicrafts advisory project is proposed later (see Chapter 5 C.3), which should inform this project on these matters. Some possible products to investigate further for Lalibela include (this is just an indicative list):
  - High quality T-shirts, hand embroidered, with designs relating to the local cultural heritage.
  - Small paintings of local scenes
  - Honey, which is a traditional product from the area, and relates to the King Lalibela and the Bees legend. It could be specially packaged for tourists.
  - Further development of leather goods.
- Training for local craft producers. This is currently available through the Micro and Small Enterprise Development Agency. It can be further focused and strengthened in terms of both production skills and business training directly related to the tourism market (Project C.3 also links in here). Ideally at least some training should be provided in Lalibela itself.



- Direct support for enterprise formation and expansion. Funds should be made available for premises and equipment, and for working capital to acquire an initial supply of raw materials. Cooperative ventures and enterprises seeking to employ poor people should be favoured. Ventures should be helped to develop simple business plans, which would form the basis of bids for funding.
- Introduction of a 'Made in Lalibela' kite mark for items genuinely made in and around the town. This might be indicated through a small card tag on items.
- Strengthening retailing of handicrafts, including a new cooperative retail outlet and craft market (see under visitor centre above).

During the mission we met an individual who is currently making a range of craft products, employing his family and a few other people. He has very interesting development plans, which involve employing very poor and handicapped people from the town. He wishes to develop a workshop and training programme as well as finding funding for raw materials. He has the land for this. He has been trained by the MSED. He already has orders he cannot fulfil. He estimates that he might be able to support around 200 poor people through this expanded business. This might provide an early opportunity for support through ST-EP. It will be important to build in some community benefit conditions to such support, so it is not simply seen as directly benefiting an individual private enterprise.

## ii. Supply to local tourism enterprises

Our initial analysis revealed a natural tendency for hotels and catering establishments to source locally owing to the isolation of Lalibela. Increasing the proportion of supplies to the sector from local poor communities may therefore depend on projects to expand the range of food produced locally. This needs to be looked at in more detail. Action to pursue includes:

- Encouraging the hotels to undertake a more systematic audit of supply sources and identify items that think could be locally supplied.
- Working with local agricultural support NGOs on the feasibility of introducing production of certain items not currently available. Particular opportunities mentioned to us include cheese and vegetables.
- Depending on feasibility assessment, support certain communities in production processes.



- Strengthen links between handicraft producers (see above) and hotels.

iii. Strengthening informal tourism service provision

This final project component is more general. We believe that certain steps could be taken to improve the quality and performance of the informal economy. Included in this is:

- Strengthening the guides association. Support is needed for further training.
- Improving the quality of some of the cheaper small hotels and food outlets, catering mainly for the independent and domestic market, through training and small funds to improve services such as toilets.
- Providing other services in town through which the community can benefit from tourist spending, such as cultural events put on by community groups.

A capacity building programme and small enterprise support fund is required over a two year period to meet these needs and opportunities.

## PILOT PROJECT IN CAMEROON

### PROJET DE DEVELOPPEMENT DU TOURISME RURAL DURABLE DU SITE D'EBOGO

#### I-DESCRIPTION PHYSIQUE ET GEOGRAPHIQUE

Le site touristique d'Ebogo se localise sur les berges du fleuve Nyong, en pleine forêt tropicale dans le village d'Ebogo. Celui-ci se trouve à 18 Km du centre de Mbalmayo, ville la plus proche, sur la direction Mbalmayo-Ebolowa, dans l'Arrondissement de Mbalmayo, Département du Nyong et So'o, Province du Centre. L'embranchement vers Ebogo se trouve à 10 Km de Mbalmayo en direction d'Ebolowa. De plus, Ebogo est directement relié à Yaoundé la capitale du Cameroun par l'axe bitumé Yaoundé-Ebolowa en passant par Mbalmayo, à 60 Km de Yaoundé dont 52 Km bitumés jusqu'à l'embranchement vers Ebogo et 8 Km carrossables.

La population riveraine qui compte environ une centaine d'âmes, est établie sur la rive gauche du fleuve Nyong sur environ 4 Km et le long de la route d'Ebolowa sur environ 5 Km. Elle pratique l'agriculture pour le petit commerce et la consommation familiale. Le cacao constitue principale culture de rente et le palmier sert à la production de l'huile de palme très consommée dans la cuisine locale. Les cultures vivrières pour l'essentiel, se résument aux maniocs, arachides, maïs, bananes plantains, pistache etc.). On y rencontre beaucoup de jeunes couples retournés vivre en campagne après une longue et vaine quête du travail en ville. Le long de la voie d'accès en terre, on recense quelques villages à l'habitat traditionnel (maisons aux toits en tôles et aux murs en poto-poto, sorte de mortier en terre dont le rôle consiste à fermer les interstices dans les murs en bois local). La pêche y est pratiquée timidement avec des méthodes artisanales pour le petit commerce et la consommation familiale. Le «kanga », poisson endémique et emblématique des eaux du Nyong est très consommé par les populations locales. La chasse au petit gibier y est pratiquée de façon non contrôlée et le braconnage est intense en raison de la forte demande par les agglomérations urbaines.

Site d'intérêt touristique indéniable, le site d'Ebogo est communément appelé «Centre touristique d'Ebogo », un point de randonnées en pirogue pour les passionnés de l'eau. Situé sur une colline, il offre une vue panoramique sur le Nyong à un endroit où son lit est assez large et son débit extrêmement lent. En effet à cet endroit, le passage du Nyong qui sillonne la forêt dense sur 690 Km, représente le principal attrait impressionnant pour le visiteur qui arrive à Ebogo pour la première fois. Cependant en plus de ce passage magnifique du Nyong, il existe d'autres composantes touristiques du site qui sont:

- l'embouchure du fleuve So'o en aval qui se jette dans le Nyong par des rapides;
- le sous-bois de la forêt;
- le paysage et la végétation du site;



- la configuration des rives du Nyong;
- l'île en amont du site;
- le village des pêcheurs en aval;
- la géomorphologie du bassin versant supérieur du Nyong;

A l'heure actuelle, le centre touristique d'Ebogo est un lieu de détente et de repos timidement exploité par une élite du village avec un bar restaurant géré de façon artisanale par les jeunes du comité de développement. Ces derniers y assurent plusieurs activités touristiques aussi bien sur le fleuve que dans la grande forêt dense. Ces activités touristiques se résument aux:

- activités nautiques et balnéaires (promenades en pirogue sur les eaux calmes pour l'observation de la faune aquatique et l'admiration du fleuve, la pêche sportive fluviale);
- promenades en forêt dans l'île en amont;
- randonnées en forêt pour la découverte de la nature;
- activités de chasse du petit gibier et le safari en forêt.

## II- CONTEXTE

La proximité du site d'Ebogo de la ville de Yaoundé, ouvre la voie au développement du tourisme urbain et péri-urbain pour canaliser vers ce site le flux de touristes venus à Yaoundé dans le cadre des affaires, des congrès et des rencontres diverses et sollicitant le repos dans la nature. Compte tenu de sa situation privilégiée par rapport aux autres sites avoisinants tels que la baie des mangroves de Mbega, l'île sur le Nyong, les grottes d'Akok Bekoé à Bikok, la mission catholique d'Akono, le site d'Ebogo avec ses composantes ci-dessus cités, pourra servir de site phare dans cette zone déjà très visitée par les touristes qui pourront désormais, en plus des merveilles de la nature satisfaire leur curiosité avec la riche culture et les traditions locales dans le cadre de circuits touristiques identifiés.

Par ailleurs, le fleuve Nyong est navigable sur une longue distance dans son cours supérieur. Rappelons que l'activité touristique a vu le jour à Ebogo dans les années cinquante sous l'impulsion du syndicat d'initiative créé par les autorités coloniales. L'équipement sommaire mis en place à l'époque a été intégré au village (auberge, restaurant, aire de jeux...). Le cours du Nyong, entre les villes d'Abong-Mbang et de Mbalmayo, constituait jadis de passage privilégié aux négriers qui trafiquaient les esclaves avec les chefs supérieurs Mbalmayo, à l'instar d'Akonolinga et d'Ayos qui furent des ports terminaux. Il existait deux sortes d'embarcations les grandes pirogues et les chaloupes. La navigation se faisait pendant les crues de septembre à novembre et d'avril à juin au moment où le tirant d'eau était élevé.

Jusqu'en 1931 et pendant les périodes de basses eaux, le chenal ainsi que les berges du fleuve Nyong étaient désherbés par les riverains (hommes, femmes et enfants) et débarrassés de troncs d'arbres échoués, sur réquisition des autorités coloniales. Depuis 1951, on ne navigue plus sur le Nyong, le transport routier ayant fait son apparition et supplanté le transport fluvial. Il est donc



possible d'envisager la création et le lancement d'un grand circuit inédit appelé «croisière sur le Nyong» qui rentrerait dans le produit de la « route de l'esclave» dont le projet en cours d'études dans notre pays et avec le support financier du Ministère du Tourisme et celui de l'Unesco.

Toutefois, le souci majeur du Gouvernement camerounais reste d'une part, la conservation de l'ensemble de la biodiversité de cette zone de forêt et d'autre part, le développement des activités touristiques, écotouristiques et surtout de tourisme rural durable dans et autour de ce site pour créer des emplois au profit des jeunes des communautés villageoises et lutter ainsi contre la pauvreté. En effet, la présence à Ebogo d'un site touristique aménagé aux normes admises aux critères des sites d'intérêt international certain, bouleversera l'image du village. Il suffira pour cela de réaliser sur ce site, une bonne étude chiffrée, des aménagements et des infrastructures touristiques en matériaux locaux et de bonne qualité pour le rendre encore plus attractif en vue de dynamiser le flux des visiteurs internationaux et nationaux, d'améliorer les conditions de vie des populations riveraines et de créer des produits écotouristiques labellisés à la périphérie de Yaoundé.

Avec la présence du village d'Ebogo sur ce site, il y aura lieu de s'assurer que la participation communautaire est effective et que l'organisation structurée des jeunes du village d'Ebogo dans le cadre du développement du tourisme rural durable soit un facteur déterminant de réduction de la pauvreté. De plus, les populations locales essentiellement pauvres, ne pourront véritablement profiter des retombées issues du développement sur ce site du tourisme rural durable que si les aménagements et les infrastructures touristiques qui y sont réalisées sont suffisamment attractifs pour attirer un grand nombre de touristes. Pour cela, il faudra organiser les populations en comités villageois de développement pour que les revenus issus de l'activité touristique profitent à l'ensemble de la communauté.

### **III- OBJECTIFS DU GOUVERNEMENT CAMEROUNAIS**

Afin que ce site connaisse un développement harmonieux, le Gouvernement camerounais préconise les actions suivantes

#### **3-1 Sur le plan du développement des activités touristiques**

- ✓ Valoriser le riche patrimoine naturel et culturel par le développant des activités touristiques susceptibles d'intéresser le plus grand nombre de touristes
  - randonnées en pirogue le long du fleuve Nyong sur près de 800 m;
  - randonnées pédestres le long des berges du fleuve Nyong sur 2 à 300 m;
  - création d'un parc récréatif et de détente sur l'île en amont;
  - observation du spectacle des cascades naturelles et safari photos à l'embouchure du fleuve So'o;
  - dégustation du poisson du Nyong fait à la braise sur ses berges au niveau du village des pêcheurs en aval;

- création du circuit de « croisière sur le Nyong »;
- développement des activités d'agrotourisme;
- ✓ Etudier les différents circuits touristiques et écotouristiques qui peuvent être développés tout autour de ce site afin d'exploiter rationnellement toutes les potentialités touristiques et écotouristiques de la région
- ✓ Créer des activités de loisirs (randonnées, pêche dans le Nyong, safari photos en forêt et à l'embouchure du fleuve So'o);
- ✓ Organiser des animations locales à caractère culturel (visite des écomusées, des traditions populaires, des itinéraires culturels, des spectacles et danses traditionnelles, des fêtes traditionnelles, etc.)
- ✓ Créer des circuits d'excursions et d'étude de plain air pour les jeunes des lycées et collèges
- ✓ Former la population locale dans l'accueil des touristes, la gestion des structures touristiques locales, le secourisme, la création de micro-projets de soutien à l'activité touristique dans le site;
- ✓ Mener des actions promotionnelles en vue de faire connaître ce site et de drainer de nombreux touristes.

### 3-2 Sur le plan des infrastructures touristiques de base

- ✓ Remettre en bon état ou réaliser le bitumage de la voie d'accès au site sur 8 Km à partir de l'axe bitumé Mbalmayo-Ebolowa;
- ✓ Construire des structures d'accueil (information, hébergement, restauration et point de dégustation de la grillade au village des pêcheurs) ;
- ✓ Créer des infrastructures sociales suivantes :
  - électrification rurale du site et ses environs;
  - construction d'un centre de santé;
  - création d'un point d'eau potable par forage et construction d'un château surélevé (plate forme de 8 m de hauteur)
  - construction de toilettes publiques;
- ✓ Aménager les berges du Nyong sur 2 à 300 m;
- ✓ Aménager les berges du Nyong au niveau du village des pêcheurs;
- ✓ Créer les aires de jeux;
- ✓ Créer un parc de détente sur l'île en amont;
- ✓ Equiper le site de zodiacs et du matériel de sauvetage;
- ✓ Créer un club nautique avec un centre d'entraînement au pilotage des pirogues à moteurs.

### 3 -3 Sur le plan de la conservation

- ✓ Prendre des mesures en vue de la sensibilisation des populations riveraines pour la protection et la conservation des différentes ressources de ce site.

### 3-4 Sur le plan de la lutte contre la pauvreté



- ✓ Exploiter le tourisme comme secteur générateur de retombées indirectes pour les populations rurales (amélioration des conditions de vie et création des revenus supplémentaires);
- ✓ Maximiser les retombées issues de l'activité touristique pour booster les autres secteurs d'activités (commerce, artisanat, entrepreneuriat, agriculture, loisirs etc.);
- ✓ Créer des emplois nouveaux au niveau local (accompagnateurs locaux, guides touristiques, conteurs, gérants de services locaux d'information et d'accueil, encadreurs des loisirs sportifs de plein air, etc.)
- ✓ Lutter contre l'exode rural;
- ✓ Encourager le développement de l'entrepreneuriat local (PME) et des micro projets indépendants venant en support à l'activité touristique;
- ✓ Permettre la redistribution équitable et durable des revenus générés par l'activité touristique.

### 3 -5 Sur le plan de la formation

- ✓ Former la population et les jeunes ruraux à apprécier la valeur du tourisme
- ✓ Organiser et sensibiliser les jeunes à la création des comités villageois de développement;
- ✓ Former les membres de ces comités de développement à la gestion participative.