MYANMAR
Ecotourism Policy & Management Strategy for Protected Areas
Annex I Designated Ecotourism Sites: A STATUS REPORT

2015 - 2025
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There are two supporting documents developed in parallel to this Ecotourism Policy and Management Strategy:
Myanmar’s Designated Ecotourism Sites: A Status Report
Guidelines for Developing Ecotodges in Myanmar (separate document)

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Foreword

Following significant economic, social and political reform, Myanmar is enjoying a sustained and rapid growth of its tourism industry. Visitors are keen to experience Myanmar’s world-renowned cities and unspoiled cultural heritage. Accompanying this growth is a demand, especially from discerning international travelers, to explore Myanmar’s natural heritage in ways that align with principles of responsibility and green growth. Myanmar is blessed with an extraordinary array of ecosystems that are rich in biodiversity, and frequently home to diverse ethnic peoples steeped with striking traditions and lifestyles. These natural and cultural treasures define Myanmar as a nation. They are also important assets critical to national and global sustainability that must be respected and conserved, and passed on to our future generations. As a signatory to international conventions including the Convention on Biodiversity, Myanmar continues to develop an expanding protected area network to conserve representative examples of its ecosystems and biodiversity.

As systems to protect these special assets are strengthened, growing attention is being directed towards management approaches that engage local communities and other stakeholders. These developments are timely and coincide with the growing interest to use ecotourism as a vehicle to promote conservation through development, which simultaneously improves the livelihoods of host communities and reduces demand for the natural assets of these areas.

In pursuit of these specific objectives, Myanmar’s Ministries of Hotels and Tourism, and Environmental Conservation and Forestry have developed an Ecotourism Policy and Management Strategy that focuses upon the tourism and protected areas relationship. Launched in May 2015, this distinctive policy and strategy draws heavily upon the findings of a detailed assessment of 21 sites designated for ecotourism by the Ministry of Environmental Conservation and Forestry.

This report presents the findings of this assessment, which was undertaken with technical support from the International Centre for Integrated Mountain Development and the Greater Mekong Sub-region’s Core Environment Program (administered by ADB through the GMS Environmental Operations Center), and in partnership with national and international NGOs engaged in Myanmar’s conservation agenda. The Wildlife Conservation Society has also played a particularly significant role in preparing this report for publication. On behalf of the Government of the Republic of the Union Government of Myanmar, we would like to extend our sincere gratitude to all the individuals and organisations that have supported this process.

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1. Introduction

This assessment of tourism and conservation issues in and around designated ecotourism sites (see Figure 1) serves as Annex 1 to the Myanmar Ecotourism Policy and Management Strategy. The site assessments were undertaken as a core component of the process to formulate the Policy and Strategy. The purpose of this publication is to:

• present and review the process followed to produce the Policy and Strategy; and,
• provide in a series of fact sheets the results of the individual assessments.

Importantly, the information provided in the fact sheets serve a “snap-shot in time” recording the current status and condition of tourism and conservation issues in and around a series of sites that have been designated for ecotourism by the Republic of the Union of Myanmar (GOM). The assessment focuses upon 22 sites, 21 of which are ecotourism sites designated by the Ministry of Environmental Conservation and Forestry (MOECAF). MOECAF initially designated 15 ecotourism sites in 2005, and expanded this number to 21 in 2011. Sites were designated according to a number of factors including their historical context, accessibility, key natural and cultural features and the presence of PA staff and Warden’s Office. The additional twenty-second site embraced in the assessment is the Ayeyarwady Dolphin Protected Area, which is managed by the Ministry of Livestock and Fisheries and likely to become a designated ecotourism site in the future. Each of the 22 assessed sites have people living around them, and sometimes within them, who depend upon the PAs for subsistence livelihood strategies. A key purpose of the Ecotourism Policy and Management Strategy is to identify and promote alternative more lucrative sources of income for these remote and often marginalised communities, and at the same time reduce their dependency on protected area natural resources.

As the Ecotourism Policy and Management Strategy makes clear, special consideration is given to tourism activity in and around Myanmar’s protected areas (PA) due to the critical role these special areas have in promoting local, national and global sustainability. Individual protected areas are part of national protected area networks which are formed to conserve representative examples of nature-based assets and ecosystems – what is also termed natural capital. Well-managed protected area networks are critical to both biodiversity conservation and arresting the effects of climate change. Despite these critical roles, it is often challenging for governments to generate revenue from these areas, or from wider government revenues, to cover their conservation management costs. Ecotourism to PAs is however an activity capable of contributing towards such revenue, as product viability depends upon the conservation of the biodiversity and the ecosystems tourists come to visit. In other words, the tourism and protected area relationship is one that deserves special consideration and careful management to ensure the forms of tourism activity being developed are fully consistent with the conservation goals and objectives of these areas.

This report should be read alongside the Myanmar Ecotourism Policy and Management Strategy. Preparation of the Policy and Strategy was undertaken between May 2014 and April 2015, with technical assistance from the International Centre for Integrated Mountain Development (ICIMOD) financed by a grant from the European Union. Additional support for this assessment work was provided by The Greater Mekong Sub-region’s Core Environment Program (administered by ADB through the GMS Environmental Operations Center). The report contains a variety of background material that adds substance to the content of the Policy and Strategy. To ensure it can also be read as a complete and stand alone publication, it also contains contextual and summary material contained in the Policy and Strategy.

The report is set out under five headings. Following this introduction, Section 2 provides an overview of the process and steps taken to complete the assessment and engage with stakeholders to formulate the Policy and Strategy. Section 3 covers the assessment findings, and Section 4 provides a brief series of observations and recommendations to guide further research or steer assessment work in this policy and planning arena. Section 5 concludes this Annex document with the presentation of the 22 factsheets.

1Two of MOCAF’s designated sites, Myaing Hay Wun and Phokyar are elephant camps and are not technically protected areas.
2. Background and Process

The need and rationale for the Ecotourism Policy and Management Strategy is prescribed in Key Objective 4.2 of the Myanmar Tourism Master Plan, which states:

"Despite current access constraints and relatively low numbers of visitors, Myanmar has considerable potential to develop ecotourism in and around its protected area network. Building on the efforts of MOECF’s Ecotourism Management Committee, MOECF and MOHT and other key stakeholders will prepare an ecotourism management strategy to ensure that tourism supports biodiversity, conservation, community-based income generation, and strengthens the management of protected areas."

Importantly, and providing specific guidance for this assessment, the Master Plan goes on to note:

The strategy will provide direction for: (i) prioritizing destinations for ecotourism activity; (ii) profiling the status and condition of natural assets, including core zones and protected species; (iii) capacity-building needs; (iv) strengthening regulatory frameworks for tourism in protected areas; (v) access and infrastructure needs; (vi) investment requirements; and, (vii) employment- and income-generating opportunities for local residents. The regulatory environment will introduce a system to collect and manage tourism user fees, taxes and other revenue and direct it toward protected area management and conservation efforts.

Taking its lead from the Master Plan therefore, this assessment reviews issues related to the seven areas noted in the paragraph above, and also highlights matters related to the application of tourism user-fees and ecolodges part-financing the primary purpose of these special areas, namely, biodiversity conservation. Simply stated, the aim of the assessment process was to: (i) identify issues and needs to be addressed in the Ecotourism Policy and Management Strategy; and, (ii) encourage informed discussion and debate at a series of stakeholder consultations convened between August and November 2014. These consultations are depicted in Stages 2 and 3 of Figure 2, which illustrates the wider formulation process to prepare the Ecotourism Policy and Management Strategy.
In terms of preparing tourism plans and strategies, it is noted this complex industry is a dynamic and pervasive activity embracing the five sub-sectors, namely: transport; accommodation; restaurant and retail; excursions, activities and events; and, banking, finance and tour operation-related services. Hence, to coordinate with key stakeholders and ensure full and inclusive consultation in the preparation of the Ecotourism Policy and Management Strategy, two groups were formed to provide guidance and feedback on the content and process to prepare the Policy and Strategy. The first of these was a Taskforce composed of 11 government Ministries, while the second was an Ecotourism Working Group with representation from conservation-related NGOs working on conservation and protected areas issues, and also the Myanmar Tourism Federation (MTF). Table 1 depicts the membership of these two consultation groups.
Over the course of the preparation of the Policy and Strategy, four separate meetings of the Taskforce and Working Group were convened. In addition, a number of consultation exercises depicted in Figure 2 were also convened including: two national workshops in Nay Pyi Taw; four regional workshops in Yangon, Kawthaung, Putao, Mindat and Mandalay; and, seven focus group meetings to engage the private sector, Myanmar’s development partners, corporations with progressive corporate social responsibility programmes, PA wardens, and ecolodge pioneers. These consultations embraced more than 600 representatives of government agencies, industry associations, individual enterprises, civil society and community leaders to help shape and assume ownership of the Policy and Strategy. This process was also instrumental in terms of capacity building and awareness raising regarding: (i) the roles and functions of PAs and PA networks which, research and contextual work revealed, are poorly understood by private sector actors and ministry personnel at the centre, state/regional and district levels; and, (ii) the composition and dynamics of the international tourism industry together with the niche market of ecotourism.

Assessment tool

The above consultations provided a broad platform to present and discuss a variety of material related to the seven information areas specified in the Tourism Master Plan, where the Policy and Strategy would need to prescribe strategic action. Initial meetings of Taskforce and Working Group discussed and approved the format for an assessment tool that would be used to gather site-specific information related to the 22 assessment sites. Table 2 depicts the range of information gathered through this assessment tool. Following these initial meetings, data to populate the assessment tool was gathered: (i) by members of the Ecotourism Working Group that are active in these PAs; (ii) via workshops with the wardens and staff assigned to these PAs; and, (iii) via field trips to 18 of the 22 designated sites. The assessment tools were largely completed by September 2014, and distributed for comment and feedback at the two national workshops. A discussion paper was also produced to accompany the assessment tools in the format of an ‘issues report’ that synthesised issues across the 22
sites and reviewed key planning and management concerns of central importance to the Policy and Strategy’s formulation.

Following the review of the completed assessment tools by the Ecotourism Working Group and the site wardens, the material was adapted and summarised into a more user-friendly ‘fact sheet’ format for inclusion in this publication.

Table 2: Ecotourism and Protected Area Assessment Tool

<table>
<thead>
<tr>
<th>Information Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. General Information</strong></td>
</tr>
<tr>
<td>1.1 Location &amp; objectives: township; proximity to existing tourism hubs; and, specific PA objectives.</td>
</tr>
<tr>
<td>1.2 Area, topography and habitat: summary descriptions.</td>
</tr>
<tr>
<td>1.3 History of status &amp; acquisition: summary descriptions.</td>
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<tr>
<td>1.4 Map with boundaries, access routes and natural/cultural attractions: collect maps available.</td>
</tr>
<tr>
<td>1.5 Tourism statistics: visitor numbers to the PA for the last five years, broken down by national and international visitors; visitor numbers by month for each of the last three years broken down by national and international visitors; brief description of how data is collected.</td>
</tr>
<tr>
<td>1.6 Tourism-related infrastructure (if present): summary details of any hotels/accommodation, restaurants, retail centres / markets, view points, key roads and access routes in and around the PA, together with notes on their general condition and primary market.</td>
</tr>
<tr>
<td><strong>2. Natural Environment</strong></td>
</tr>
<tr>
<td>2.1 Biodiversity status: summary of the biological diversity and the significance of the PA’s ecosystems.</td>
</tr>
<tr>
<td>2.2 Priorities of annual biodiversity plan (if existing): details of any management plans that have been prepared including details of the priorities of the current management plan.</td>
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<tr>
<td>2.3 Resource use: details of land use patterns and zoning systems in place.</td>
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<tr>
<td>2.4 Tourism assets: details of the flora and fauna that make the PA interesting from an ecotourism perspective, including any unique selling points.</td>
</tr>
<tr>
<td>2.5 Risks and vulnerability: describe any tourism and non-tourism-related risks and threats to the PA’s biodiversity.</td>
</tr>
<tr>
<td><strong>3. Cultural and Human Environment</strong></td>
</tr>
<tr>
<td>3.1 Demographics: overview and key data illustrating the number of villages in and around the PA, as well as their population, socio-economic profiles and ethnicity.</td>
</tr>
<tr>
<td>3.2 Livelihood activities: summary of livelihood activities including details of any use of, and dependency upon, the PA’s natural resources and ecosystems.</td>
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<tr>
<td>3.3 Local governance structures: summary of governance structures including formal and informal structures such as community-based organisations.</td>
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<tr>
<td>3.4 Gender and social inclusion: describe any structures, initiatives or activities in place to promote gender and social inclusion.</td>
</tr>
<tr>
<td>3.5 Cultural heritage values: describe the ethnic profile and traditions of local communities and include mention of tangible cultural assets (temples, monasteries etc.).</td>
</tr>
<tr>
<td>3.6 Attractions for tourism / unique selling points: details of any cultural features, assets and festivals that make local communities interesting from a tourism perspective.</td>
</tr>
<tr>
<td>3.7 Vulnerability: describe any risks and threats to local communities and their cultural integrity.</td>
</tr>
<tr>
<td><strong>4. Protected Area Management</strong></td>
</tr>
<tr>
<td>4.1 Management structure: describe the management structure and human resources of the PA, with details of office and guard post locations and the extent of IT equipment.</td>
</tr>
<tr>
<td>4.2 Community engagement and management structure: summarise on-going work programmes to engage local communities in park management issues and describe any formal systems in place to consult with local communities.</td>
</tr>
<tr>
<td>4.3 Tourism and protected area management: describe any tourism-related user fees (visitor entry fees; concession or lease agreements with hotels, restaurants or retail outlets; vehicle entry or parking fees).</td>
</tr>
<tr>
<td><strong>5. Community Capacity</strong></td>
</tr>
<tr>
<td>5.1 Willingness to engage in domestic and international tourism: describe the interest of local communities in tourism (if any) including efforts to provide tourism-related products and services to either domestic or international tourists.</td>
</tr>
</tbody>
</table>
5.2 Capacity to host tourists (local control): describe the level of awareness local communities have to host and service domestic and international tourists.

5.3 Capacity to invest in tourism development: are local communities able to invest in tourism products, services and related supply chains? Are credit or banking opportunities available?

6. Ecotourism Potential

6.1 Accessibility: describe how tourists gain access to the protected area; what transport routes and methods are used?

6.2 Basic infrastructure and facilities (health care, communication): describe where and what: a) telephone and internet services; and, b) chemist, health care and hospital services are available including where the nearest hospital is located and travel times to the hospital.

6.3 Seasonality: are there key seasons, festivals or other issues or events that influence the numbers of visitor arrivals?

6.4 Competitiveness: describe any similar or competing tourism attractions and resources that this protected area competes with, and that influence the numbers of visitors coming to the site.

6.5 Ecolodges: are ecolodges needed in or around the protected area; if yes, describe potential sites and locations.

7. Strengths, Constraints, Opportunities and Risks

List in a series of bullet points the key strengths, weaknesses, opportunities and threats of the PA in terms of its viability as a tourist destination.

8. Stakeholders and Stakeholder Coordination

Develop a bullet point list of primary, secondary and peripheral stakeholders with interests in, or linkages to, tourism activity in the PA, including those directly benefiting from, or negatively impacted by the development of tourism.

9. Limits of Acceptable Change

Produce a bullet point list of any unacceptable economic, environmental and social impacts or changes that tourism activity could bring to the protected area.

10. Value Chains

10.1 Handicraft & local product linkages: describe any significant handicrafts or products produced locally and suggest interventions that might be needed to adapt the item to suit tourist tastes, or equip local producers with business-related skills.

10.2 Food & beverages: describe the significance of any food & beverage-related supply chains, especially where items (meat/fish, rice/pulses, vegetables, fruits etc.) are farmed or produced locally and consumed in the tourism economy.

10.3 Excursion, entertainment and transport linkages: describe any significant activities, excursions and entertainments, including provision of forms of transport used in the tourism economy, that have the potential to generate meaningful income and employment.

10.4 Retail linkages: describe the relevance of local markets and retail outlets to the tourism economy. Include details of the range and extent of items sold to tourists, accommodation providers and restaurants.

10.5 Accommodation: describe the significance of any accommodation-related supply chains that are not captured in the above four subsections.
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MYANMAR Ecotourism Policy & Management Strategy 2015 - 2025
3. Assessment Findings

The assessment produced a wide range of material for analysis, policy formulation and prescribed action to strengthen ecotourism planning and management. While Part I of the Ecotourism Policy and Management Strategy provides a summary analysis of key issues arising from the assessment, sections below (i) review issues related to the collection of information for inclusion in the assessment tool; and, (ii) discuss needs to strengthen ecotourism planning and management. The discussion is set out under the information headings included in the assessment tool.

3.1 General Information on Protected Areas

Background information

Although extensive background information on each PA including its key assets and resources, management objectives and basic infrastructure is available, it is not available in a format suitable for industry use and readily available for tour operators, tourists and other industry-related stakeholders. In a number of cases this lack of access to information is holding back visitation and ecotourism investment potential in and around Myanmar’s protected areas. Reinforcing this point, a survey of tour operator interest in the PAs concluded that many tour operators are unaware of the assets and potential attractions in almost half of the PAs. This includes Mainmahlakyun, for example, a PA relatively close to Yangon with extensive mangroves and habitat of an impressive number of large crocodiles, but that receives low numbers of visitors. To address this issue, clear maps depicting PAs, their boundaries, access roads, transport options, primary and secondary tourism assets and villages are needed and should be distributed for industry and tourist use in soft and hard formats. The PA maps included in this publication vary greatly in quality and information content. While they provide a useful starting point of spatial information, further work is required to add greater detail of greater practical use to ecotourists and the private sector.

An interesting feature of the designated sites is the variability of size of the PAs, which varies from Lawkanandar as the smallest at just 0.44 km² to Hukaung Valley the largest of the designated sites at 160,802.53 km². There is also extraordinary variety in the topography and features of the sites from Himalayan landscapes with alpine meadows and forests, to tropical islands with rich mangrove forests. In between these north and south extremes are lakes and wetlands together with PAs allocated for in-situ and ex-situ species conservation, which are likely to be of visitor interest but require quality interpretation to enrich the visitor experience.

Levels of visitation

Basic visitor data profiling both domestic and international visitation is available for some sites but lacking in many others. While a shortage of human resources often explains this deficiency, management actions are needed to set in place improved and robust data collection systems and processes. Such data is critical in terms of performance measurement (“you can’t manage what can’t measure”), and to justify the allocation of budgets dedicated to expanding ecotourism activity. Monthly datasets recorded in spreadsheets are needed to profile visitation of both domestic and international visitors, with international visitors broken down by nationality. Ideally, the duration of stay within the PA should also be recorded.

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*Primary assets relate to the natural and cultural resources of interest to tourists, whereas secondary assets refer to the built environment that facilitate tourism activity such as accommodation, restaurants, retail outlets etc.*
3.2 Natural Environment

**Biodiversity attractions and information**

Similar to the situation as regards the background of each of the PAs, detailed information profiling the natural assets of protected areas and the significance of their ecosystems are available, but not in formats accessible or available to tourists and industry actors. Considering the huge diversity of fauna and flagship species throughout the country, including wild elephants, leopards, tigers, gibbons, turtles, the Irrawaddy dolphin, crocodiles and many rare birds, together with remarkable flora including mangroves and rare orchids and stunning landscapes from Himalayan vistas to tropical islands, this information gap represents an important and high priority area for future investment. While this publication represents the first attempt to deliver such information, substantial additional work is required to build on this knowledge and material. Action is needed to develop a variety of PA specific interpretation materials, including, for example, maps, brochures, films and short videos, posters and high-quality 'coffee-table' books with extensive glossy photographic material profiling Myanmar's extraordinary wealth of natural capital. This information needs to be prepared in such a way as to promote the unique features and selling points of each individual protected area.

**Protected area planning**

In general terms, and as is the case with many less-economically developed countries, protected area planning and management in Myanmar is under-resourced in both human and financial terms. This underinvestment has held back the production of comprehensive and multi-year PA management plans. As a consequence annual conservation plans are prepared but in many instances these lack substance and attention to detail, which creates an uncertain environment for developing ecotourism. Many protected areas, for example, have unclear boundaries and are also deficient in terms of zoning systems to protect core areas or demarcate zones that lend themselves to tourism-related infrastructure or activities such as wildlife viewing. A range of inputs are therefore needed to strengthen PA planning and create a more certain investment environment for Myanmar Ecotourism.

**Risks and vulnerabilities**

While most of the 22 assessed sites have low-levels of wildlife-related tourism, the natural assets of a small number of PAs are threatened by rapid expansion of tourism activity, including Inlay Lake and Kyakhtio. Visitor growth and the expansion of tourism-related infrastructure in these areas are proceeding with insufficient regard to protected area and conservation management issues. This situationhighlights the real and present challenges faced by under-resourced PA managers and their staff, especially where the economic interests associated with growing tourism activity receive more attention than environmental issues. In Inlay, for example, crowding and noise pollution of boats on the Lake disturbs wildlife and is leading to growing visitor dissatisfaction. Meanwhile poor waste management including the pollution of watercourses at Kyakhtio threaten ecosystems as well as human health in a number of areas. At the same time, however, the assessment makes clear that the greatest threats to most areas originate from the resident populations living in and around these areas. Poverty and the livelihood strategies of these populations are linked to a variety of threats including: hunting for subsistence and commercial purposes; logging and firewood extraction for subsistence and commercial purposes; and, expansion of agricultural and plantation land. Population growth and a lack of livelihood alternatives for disadvantaged families are the most common drivers of these threats. In some areas including, Hukaung, Hponkanrazi and Indawgyi, mining for precious and semi-precious stones and minerals is also an immediate threat.
3.3 Cultural and Human Environment

Demographics, local livelihoods & ethnicity

The great majority of households living in and around the 22 assessed sites are impoverished and depend upon subsistence strategies for their day-to-day livelihoods. While township population data has recently been collated through a national survey, data sets profiling populations of residents in and immediately around the assessed sites has yet to be disaggregated. The assessed sites embrace an impressive wealth of diverse ethnic groups from the Himalayas to the Myeik Archipelago, including Bamar, Chin, Danu, Jimphaw, Kachin, Kadu, Kanan, Lisu, Moken, Rawang, Shan and Taron. Subsistence agriculture is undertaken in and around most PAs, with small-scale farmsteads forming an integral component of the cultural landscape. By way of contrast, households in wetland sites depend heavily, and in the case of the Moken in the Lampi Marine National Park, almost entirely upon subsistence fishing for their survival. Small-scale logging, fuel-wood collection, subsistence hunting and incomes from casual labour and small retail operations complement household incomes in all areas. The extent of dependency upon natural resources varies from one PA to another, and from one specific location to another within individual PAs. In most instances resource use is marked by a lack of detailed research profiling the scale, extent of impact and significance of such exploitation.

Governance

Little information is readily available to diligently assess how development decision-making is undertaken at the village level in and around the assessed sites, or how communities interact with formal governance structures. It can be expected that more remote and less developed areas will be more removed from formal governance structures. In terms of development assistance to these areas, with the exception of Inlay and Natmataung, there does not appear to be any development partner activity focused upon governance, the creation of community-based organisations or promoting gender and social inclusion programs in these areas. Conservation-based NGOs are however working in Ayeyardwady, Hakaborazi, Hponkanrazi, Indawgyi, Lampi, Lawkananadar, Meinmahla Kyun, Moeyungyi and Myaing Hay Wun and governance-related issues are a part of these PA support programs.

Cultural heritage

The cultural assets and features of many of the assessed sites form an important part of the tourism landscape. Five of the PAs have important pagodas and festivals that attract hundreds of thousands of visitors per year and, in the case of Kyiakhtiyo, around two million visitors per year. High visitation over short periods places exceptional pressures on PA resources at some sites, including Alaungdaw Kathapa, Indawgyi, Inlay and Kyiakhtiyo. As noted in the policy and strategy, actions are needed in these sites to: (i) improve the quality of the domestic visitor experience; (ii) reduce negative impacts that occur during high-visit periods; and, (iii) encourage pilgrims to stay longer to enjoy nature, diversify the product offering and promote ecotourism.

Vulnerability

Extreme hardship and difficult living conditions threaten cultural integrity in a number of sites including the PAs of Kachin State and the far south in Lampi Marine National Park. These threats are generally non-tourism-related. In Hakaborazi, for example, young people migrate to urban areas and also abroad to seek paid employment to supplement household incomes. Having left home, it is often difficult to return to isolated homesteads to literally plough out a living. Similarly, in the case of the Moken, over-fishing, including dynamite and drag-net fishing techniques undertaken by various groups, have decimated fishing grounds and contributed towards an altogether uncertain future for these once nomadic people. In both instances, while ecotourism activity offers some potential to serve as a vehicle for income, employment and wider community development to reverse rural decline, substantive impacts will only be achieved through well-planned and coordinated interventions that engage multiple government departments at the national, state/regional and township levels.
3.4 Protected Area Management

**Management capacity**

PA budgets and MOECAF staff numbers working in the assessed sites are increasing year upon year, along with greater synergy and momentum towards collaborative management approaches in partnership with local and national government agencies. Nevertheless, while each of Myanmar’s PAs have prescribed numbers of staff positions to fulfil management goals and objectives, few if any of the PAs have all of these posts filled. Most of the assessed PAs have around two-thirds of their allotted staffing. PA wardens report they lack staff: numbers to effectively manage their PA (especially with regard to patrolling and community-outreach programmes). Patrolling against illegal fishing in Lampi Marine National Park is, for example, undertaken in partnership with the Department of Fisheries and the Navy and is largely ineffective. In the case of Hponkanrazi, field staff have yet to be allocated and the PA is managed by the warden of Hkakaborazi. Other sites with less than 10 staff include ThamihlaKyun and Wetthikan. By way of contrast, AlaungdawKhathapa, Hlwaga and Popa Mountain each have over 100 staff, with most engaged as foresters and forest guards.

In general terms, a lack of field staff creates difficult problems in terms of regulation and law enforcement, as insufficient staff are present to gather robust evidence of illegal behaviour. None of the PAs have dedicated ecotourism staff or personnel trained in tourism and protected area issues. This lack of human resources and tourism expertise is a particular constraint where visitor numbers are growing or already high, such as Inlay and Kyikhtiyo. A similar situation exists at the centre-level, where staff time and skill sets are needed to oversee the design and delivery of priority projects and programs in flagship sites, as well as encourage the replication of good practice elsewhere.

Beyond human resources, PA management also suffers from limitations in other resources, including transportation, monitoring equipment and access to IT equipment and services. Many of the PAs have no computing facilities, printers, projectors or cameras for monitoring work, and no internet access. These deficiencies combine to restrict management capability in a number of areas including impact monitoring, regulation and visitor management. Against this background all PAs are engaged in community-outreach work to raise awareness of conservation issues, gain support for management activities and reduce dependency upon PA natural resources. This work is most effective where it is supported by conservation-related NGOs.

**Tourism-related user fees**

A key aim of tourism to protected areas is to generate income sources to support management costs, and provide alternative incomes to reduce local dependency on the natural assets of these areas. While six of the PAs currently charge entry fees, including Hlawga, Inlay, Kyikhtiyo, Lawkanandar, Moeyungyi and Natmataung, the income generated does not always contribute towards PA management costs. In Inlay, Kyikhtiyo and Natmataung for example, entry fees are charged by the state government or a trustee body with none of the funds currently going to the PAs. As noted in the Policy and Strategy, a similar situation exists with regard to accommodation agreements with the private sector. Moreover, there are currently few if any good practice examples of tour operators undertaking ecotourism-related activities within PAs entering into user-fee agreements with PA management bodies. This is a critical area of work where there is a need for clearer guidelines setting out roles and responsibilities of government, private sector and other parties; and, improved implementation practices by public and private sector entities to ensure a percentage of tourism-related revenues contribute towards conservation objectives.
3.5 Community Capacity

**Tourism opportunities**

The tourism industry provides a diverse range of income and employment opportunities, and many of these offer opportunities to reduce the dependency of PA communities on the natural resources of these areas. Examples include: employment in different types of accommodation and restaurants, and as tour guides; supplying food-related items, handicrafts and retail products to tourists, restaurants and hotels; providing tourism-related transport; and, working in the construction and building maintenance sectors where there are linkages to tourism growth and activity. The extent to which destination communities engage in tourism-related activity typically depends upon a variety of factors including: visitor numbers and markets, their length of stay and potential spending power, the size, nature and sophistication of the local economy; and, the skill sets and experience of destination communities to engage in tourism-related supply chains. This last factor is especially significant in relation to maximising opportunities to deliver ecotourism-related benefits to local communities.

**Current situation**

With the exception of Inlay Lake and Lawkanandar, which receive around 100,000 and 30,000 international visitors per year respectively, international visitor arrivals to the designated sites are relatively low and cannot be described as a primary or substantial market. Hence, in the 12 assessed sites where local engagement in supply chain activity is occurring, the primary market is domestic visitors and in most cases visitors on religious tours. Services developed by local communities targeted towards these visitors are largely concerned with providing food and refreshments. In other words, of the income and employment opportunities listed above, focus is currently directed towards a limited range of tourism-related services, namely simple restaurants and food-stalls. Moreover, with the high focus upon festival-related tourism, it is apparent communities living in and around the PAs lack experience, skills and knowledge as well as access to capital to diversify their product and service offering, especially with regard to extending income opportunities into ecotourism-related activity.

Put simply, a high incidence of poverty suggests local communities will seek out ecotourism-related employment opportunities. Nevertheless, a variety of tourism industry awareness-raising and skills training interventions, as well as access to financial services, are needed in virtually all locations to enable destination communities to engage in and benefit from ecotourism development. Evidence from abroad and domestically, at Inlay Lake for example, demonstrates that a constant flow of visitor arrivals and the right enabling environment allows destination communities to seek out and develop new business opportunities. To maximize local impact and facilitate local business growth, interventions are needed to: (i) profile the size and significance of current supply chain activity; (ii) assess levels of market awareness and interest to diversify the product offering; and, (iii) match awareness raising and skills training activity with the supply of new visitor arrivals and markets to these areas.

3.6 Ecotourism Potential

**Access and infrastructure issues**

The 22 assessed sites offer a wide array of features and selling points to attract various visitor markets. As noted elsewhere these embrace contrasting landscapes, exotic flora and fauna and diverse ethnic groups. However powerful and engaging these attractions may be however, access and security are two fundamental determinants that influence the viability of tourism activity: visitors must be able to reach and move around a destination, and be free from harm when doing so. Based upon the travel times to the designated sites, the Ecotourism Policy and Strategy groups the destinations into three categories according to travel times and ease of access to reach them. Access issues are also one of the key factors influencing the positioning of the site as either a first or second priority for developing ecotourism. 14 of the designated sites...
face some form of access constraints, and would greatly benefit from access improvements. Poor road conditions to reach the sites and move around them are common issues that need resolving, and that require significant capital investment to remedy. Improved transport options to reach the designated sites also needs attention as many locations can only be reached via 4-wheel drive, which is an expensive form of travel for many tourists. In brief, to fully unleash Myanmar's considerable ecotourism potential, attention needs to be directed towards strengthening national and local transport routes and options.

In addition to access issues, consideration also needs to be given to other infrastructure. Especially important are telecommunications, internet and health services. Given most of the PAs are by their very nature in remote locations, access to mobile telephone networks and the internet is restricted and access to health services is also difficult and time-consuming. Improved access to internet and telecommunications infrastructure would also greatly benefit and strengthen PA management. While the lack access to these services does not imply ecotourism activity is unsuited to these areas, it does imply clear safety and evacuation procedures need to be articulated, rehearsed and followed in high risk areas. This involves risk analysis and pre-determining safety protocols and procedures. In most areas, crisis response plans have been prepared by the Ministry of Social Welfare, yet in some cases these plans do not appear to have been communicated to private sector actors including tour operators.

**Seasonality**

Seasonality is a significant issue influencing the ecotourism potential of the assessed sites. While visitation to a number of sites, including Alaungdaw Kathapa, Hkakaborazi, Hponkanrazi, Hukaung Valley, Lampi, Meinmahla Kyun, Moeyungy, Natmataung and Thamihla Kyun, are adversely affected by monsoonal weather, other sites including Hlwaga, Inlay, Kyiakhtiyo, Lawkanandar, Myaing Hay Wun, Panlaung and Pyadalin Cave, Phokyar, Popa Mountain, Shwesettaw and Wetthikan are far less affected by seasonal weather and might be promoted as year-round destinations.

**Accommodation**

The supply of accommodation is a critical factor where investmentis needed to fulfil the potential of an ecotourism destination, and this is an area where special attention is needed in Myanmar. At least 12 of the PAs have significant limitations as regards accommodation. Some have no accommodation within or near the PA, while others have simple guesthouses or converted village houses, which need upgrading to attract wider and often higher-spending markets. Many of the PAs, such as Hkakaborazi, Indawgyi, Meinmahla Kyun and Thamihla Kyun cannot realistically be developed or promoted as ecotourism destinations without accommodation being established within or very close to them. To help promote forms of ecotourism that are consistent with the vision, mission and guiding principles of the Policy and Strategy careful consideration needs to be given to siting, design and operational issues related to accommodation in and around the PAs. This will help ensure accommodation sited in and immediately adjacent to PAs: (i) provides direct and indirect financial returns, as well as non-financial benefits, to Myanmar's PA network; (ii) delivers benefits wherever possible to local communities; and, (iii) conforms to standards of operation befitting their location in national protected areas. Annex 2 of the Policy and Strategy focuses specifically upon issues related to the design and operation of ecolodges in and around PAs.

3.7 Strengths, Constraints, Opportunities and Risks

Table 5 in the Ecotourism Policy and Strategy sets out in bullet form the collective strengths, constraints, opportunities and risks associated with developing Myanmar Ecotourism. Attention is drawn to the high priority the tourism sector enjoys as a key pillar of GOM’s overall development strategy, as well as the strong growth in visitor arrivals and the interest of tour operators and visitor arrivals to explore and learn about Myanmar’s PAs and their extraordinary wealth of natural assets. These flagship sites, the flora and fauna they harbour together with background stories of conservation successes, as well as threats to protected area management, are of great national and international media interest. This is especially
true of high profile sites such as Inlay, Hkakborazi, Lampi, Natmataung and the other ASEAN Heritage Parks. While visitor numbers to explore and enjoy the unique vegetation and wildlife of these areas is still relatively low, the high commitment of MOHT and MOECAF to set in place tourism-related management systems is borne out in the content and direction of the Ecotourism Policy and Management Strategy. This solid commitment will, from the outset, help to deliver win-wins for the PAs, local communities, their visitors and the nation as a whole.

To carry the Policy and Strategy forward to implementation increased resources and political support for PAs at the State/Regional level is however required. The assessments undertaken raise a series of concerns from road construction to the summit of Mt Victoria, to the construction of the hotel zone in Inlay and mining activities in Indawgyi and Hukaung Valley, that illustrate greater coordination and cooperation across and between national and state/regional government agencies is urgently required. It is apparent that both (i) the role of PAs in promoting sustainable forms of development at the global, national and state/regional levels, and (ii) management systems to promote effective management of individual PAs, is poorly understood at many levels of government and across government ministries. This is an on-going challenge that will inevitably take time to address, but one that must be systematically addressed with some urgency to strengthen the policing and regulatory environment of PAs. As with many countries and the situation globally, for example, the total income and spending generated from tourism activity to PAs is likely to greatly surpass the amount spent on managing these areas³. Critics therefore argue that increased spending to strengthen protection and management will yield even greater incomes from these areas.

If the above constraints can be addressed Myanmar Ecotourism offers the potential to create tens of thousands of jobs, lift thousands of households from poverty and serve as a vehicle for developing rural economies. The design and delivery of a robust Ecotourism Partnerships Framework will: (i) help ensure conservation objectives are achieved; (ii) serve as a regional model of good practice; and, (iii) serve as a key tool to showcase Myanmar Ecotourism as component of GOM’s green growth strategy. Models of good practice that evolve in and around Myanmar’s PAs will also be replicated far beyond these areas, and thus help protect and conserve biodiversity and ecosystems, as well as alleviate poverty in other parts of the country.

### 3.8 Stakeholders and Stakeholder Coordination

The 22 assessments help illustrate the complex web of stakeholders that engage in tourism planning environments. In brief, key stakeholders include: State/Regional government decision-makers; MOECAF; MOHT; private sector investors and tour operators; local communities and resident entrepreneurs; and, development partners engaged in conservation and development agendas. Importantly, the issues already discussed above often allude to the need for coordinated and strategic action at senior levels of national and state/regional government. At the same time however, the focus of ecotourism upon delivering benefits to local communities, conserving biodiversity and interpreting ecosystems and conservation actions to inform and educate visitors, also point towards the need for strong stakeholder coordination and collaboration at the site level. Opportunities to create local jobs and incomes will not be maximised, for example, unless communities are consulted and involved in destination planning actions and activities. Determining when and where different stakeholders come together at the site level to discuss, plan and manage ecotourism-related issues will vary considerably from one destination to the next, and will be driven issues specific to that location.

In most instances, and as illustrated in Figure 5 of the Policy and Strategy, PA ecotourism committees need to be formed at the destination-level. While one committee may be sufficient for some PAs, larger PAs with dispersed villages and stakeholders may conclude that more than one committee is needed to achieve an adequate level of coordinated planning and management. Similarly, many PAs are likely to benefit from some form of representation on a Destination Management

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Organisation that operates at a broader level addressing issues both within and beyond PA boundaries. In the case of Lampi Marine National Park, for example, an Ecotourism Committee composed of local residents is needed to focus upon tourism planning and management issues within the Park and the key village of MakyoneGalet. Another committee is however also needed that engages the live-aboard boats that visit the Park and depend upon permissions and services based in Kawthaung. While this second committee needs to deliberate ecotourism management issues within the Park, it is also concerned with tourism management issues beyond the Park. Hence careful consideration is needed to determine the most appropriate platforms best suited to the local context.

3.9 Limits of Acceptable Change

Tourism planning approaches including identifying carrying capacities and defining the limits of acceptable change can help guide the design of destination management plans, but are often challenging concepts to apply, especially where budgets are limited. During the design of this policy and strategy views were sought from wardens, NGOs, the private sector and local stakeholders as to the limits of acceptable change that tourism might bring to individual PAs. In particular, opinions were sought on what would constitute unacceptable economic, social and environmental change within the PAs, these included: the development of large hotels; increases in wildlife trade; forest and wildlife degradation; disturbance to nesting, breeding and core ecosystem habitats; littering and poor solid and sewage waste management; sex tourism; excessive local economic inflation and land speculation; and, loss of local and especially ethnic cultures. Views were also expressed suggesting the limits of acceptable change have, in some instances, been surpassed in Hlawga, Inlay, Kyiakhtiyo and Natmataung with examples given of sometimes alarming developments that threaten the integrity, aims and objectives of these sites. These include, for example: over-population of non-native macaques in Hlawga; tourism-related waste polluting Inlay Lake; poor waste management polluting watercourses at Kyiakhtiyo and road construction undertaken with no environmental impact assessment in Natmataung. To prevent unacceptable change and avoid irreversible damage, such concerns underline the need for (i) long and medium-term conservation management plans, and (ii) dedicated ecotourism plans that align with and support conservation aims and objectives. This is especially true for PAs with significant tourism potential and that are of high interest to investors. Experience from within and beyond Myanmar’s borders suggest a lack of proper planning will result in unintended social, economic and environmental impacts, as well as an accumulation of growing threats to the integrity of Myanmar’s PAs.

3.10 Value Chains

Section 5 above reviewed issues related to tourism value chains. It concluded that with the exception of Inlay Lake, Lawkanandar and Kyiakhtiyo, supply chain activity is relatively modest. Where such activity is present, it is generally focused upon the provision of local food and refreshments. The assessment work undertaken as part of this study did however lack the human and financial resources to analyse any value chains in detail, and assess the extent to which local households are benefiting from such activity. This is an area where further work is required and given Inlay and Kyiakhtiyo’s position as the PAs with the most developed tourism economies, it is recommended these sites be included in any studies to further investigate and better understand how local households have linked their livelihood strategies to tourism, and what steps are required to facilitate and strengthen these linkages.
4. Conclusions

As the above sections and the broader content of the Policy and Strategy illustrate, while Myanmar Ecotourism offers many big and small opportunities, these opportunities are accompanied by a series challenges and constraints that are commensurate in scale. Moving the sector forward in a strategic and coordinated manner to deliver scalable and demonstrable benefits, demands interventions at the national, state/regional and local levels.

First and foremost the issues stressed above, together with those highlighted in the fact sheets that follow, illustrate there are a wide variety of site-specific issues that need to be further researched and addressed on a case-by-case (or PA by PA) basis. Put another way, destination-level issues are complex and integrated destination planning offers the most assured route to any viable market-led solutions to support protected area management. Similarly, solutions to local problems can best be found through the preparation of the integrated PA ecotourism plans that support the wider conservation objectives of the individual protected areas. At the same time, however, access, security4 and economic constraints confirm that it is neither possible nor desirable to develop ecotourism in and around each of the 22 sites at the same time. A phased approach is required to developing Myanmar Ecotourism in and around destinations with the most immediate market potential. Hence the Policy and Strategy identifies first and second tier PAs and priorities for preparing conservation management and ecotourism plans.

Beyond site-level issues, state/regional governments are key stakeholders in terms of investing in infrastructure to improve destination access, and support the positioning of protected areas in their wider (i) tourism resource and destination planning; and, (ii) planning for balanced, equitable and sustainable development.

The impetus and drive to deliver local and state/regional solutions to facilitate and enable ecotourism management plans does however rest largely at the national level, and the Policy and Strategy identifies a series of coordinated activities to move this agenda forward in a substantive manner. Significant among these activities are: (i) the positioning of ten guiding principles to instil among all stakeholders an understanding of the key ingredients by which the success of Myanmar Ecotourism can be judged; (ii) the formation of a Ecotourism Sub-committeeunder the Tourism Development Central Committee to carry the Policy and Strategy forward to implementation; (iii) the design and delivery of an Ecotourism Partnerships Framework to set out the legal, organisational and financial framework to oversee the planning and management of ecotourism businesses in protected areas; and, (iv) linking back to PA and destination-level issues, the design of implementation of integrated ecotourism plans that support the conservation objectives of the protected areas, and the improvement of livelihoods of the communities living in and around these areas.

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4This embraces a lack of communication and health services as well as conflict issues
5. Factsheets
Alaungdaw Kathapa National Park

Introduction

Location and Geographical Context

Alaungdaw Kathapa National Park is located in Kani and Minkin Townships of Sagaing Region, around 400km north-west of Mandalay (3.5 hour drive). The Park embraces the upper catchment basins of three main rivers creating steep sided valleys and prominent ridges with elevations from 135 to 1,335 meters.

Tourism Activity

Visitor Numbers

Domestic visitors increased from 150,000 in 2010 to 230,000 in 2013. International visitor numbers are very modest with only 27 in 2012 and 8 in 2013. The great majority of visitors/pilgrims occur during the auspicious full moons between January and April.

Attractions

The Alaungdaw Kathapa shrine is the dominant attraction for most visitors who come to worship and partake in festivals in season. The rich biodiversity of the Park attracts visitors who come for scientific research and wildlife viewing purposes. The interior of the Park is accessible only during the drier non-monsoon months from October to April. Due to a lack of roads elephant riding is currently the best option to move around the Park.

Facilities

The National Park has two small guesthouses able to accommodate a total of 20 people and there are small restaurants in the locality. A significant amount of temporary facilities are built to support the pilgrims during the festival season including sleeping huts, food service and small vending stalls.

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**Fast Facts**

- Date established: originally established in 1993.
- Size of PA: 1,605km
- Number of staff: 162
- Visitor numbers: Domestic: 230,000, International: 8
- Visitor facilities: Guesthouses and restaurants
Tourism Revenue Generation

The Park receives no entrance fees. Pilgrims make donations directly to the Pagoda Management Committee. The Committee also collects fees from local service providers such as food (about 50 stalls), souvenirs and worship items (about 20-25 stalls), and accommodation in Dharma halls (40-50). The PA receives no compensation from this activity and economy. Most of the revenue generated by the pilgrimages activities goes to Pagoda Management Committee or local government authorities.

Park Management

Structure

While 162 staff positions for the Park have been identified only 85 have been appointed. The Park is divided into Core and Buffer zones for management, patrolling and conservation purposes. Six guard posts support these efforts aided by 26 elephants. A five-year management plan is currently being prepared.

Priorities

The Park’s management priorities include: conserving the Chindwin and Myittha watersheds; maintaining forest ecosystems and biodiversity; undertaking research of endangered and residential species; raising local awareness on biodiversity issues; encouraging local participation in nature conservation activities; enforcing Park laws, rules and regulations (patrolling); addressing climate change issues; implementing the Park’s zoning management system; implementing conservation activities in partnership with local, national and international partners; enhancing the income opportunities of local communities; and, preserving the Maha shrine.

Ecology and Conservation Status

Ecology

Six types of forest cover creates habitat for a rich biodiversity that includes: 465 plant species with 49 species of orchid and 143 medical plant species, 33 Mammal species including wild elephants, leopards, clouded leopard, gaur, sambar deer, wild boar, serow, sun-bear, brown-bear, civets, and the giant squirrel, 94 Reptile and Amphibian species, 486 species of birds, including the asian barred owl, white-throat kingfisher, white crested laughing thrush, and the little green pigeon, and 42 insect species including 250 types of butterflies.

Conservation issues

- The mass pilgrimages and festival season activities places puts heavy strain on Park’s natural resources. While much of this activity is confined to a relatively small area resource are gathered through out the park to support these activities.
- Exploration for oil and gas deposits, which involves the use of explosive devices, is an ongoing concern.
- Illegal logging and Teak trading.
- Encroachment by local communities for NTFP harvesting, hunting and fishing are also on-going threats.

Local Livelihood Status

30 villages are located around the Park comprising 5,827 households and 30,290 people. Local livelihoods are based on subsistence farming and varying degrees of exploitation of the Park’s resources including harvesting NTFPs and engaging in subsistence and commercial hunting.
Engagement in Conservation

The Park runs ongoing education and awareness-raising programme with local communities in an effort to reduce pressure on the Park’s natural resources.

Culture

Alaungdaw Kathapa National Park is named after a legendary monk that used to live in the area. A shrine in the Park contains his remains make the Park the destination for one of country’s most famous important pilgrimage sites. The Htamanae ceremony of full moon day of Tabohdwe month (middle of January to middle of February), together with the donation ceremony of full moon day of Tabaung (March) and the umbrella shaking festival of Kapaing village are the primary cultural attractions.

Ecotourism’s Role, Opportunities and Challenges

Current Role of Ecotourism

To date, ecotourism has had very little if any significance in the Park. Most international visitors have been involved in scientific pursuits and not visiting for tourism purposes. The vast majority of visitors are domestic pilgrims. The impacts from this visitation include exploitation of resources for temporary buildings and fuelwood, souvenirs and worship items made from NTFPs, littering, poor waste management are negative impacts that relate to local income earning opportunities.

Opportunities

• Improved access to deeper regions of the PA will be available when the road to Kathapa shrine is completed (2015).
• Product diversification to develop more ecotourism products in the Park. A 3-day, 2-night trek starting in the Park that would include diverse scenery including caves and waterfalls, with good biodiversity and wildlife viewing opportunities has been proposed by the Park.
• Supply chain enhancement that takes advantage of the mass pilgrimages that provide opportunities to increase the incomes of local people by creating better market links to local supplies and services. Identifying and developing value-added products that are sustainably produced need to be supported.
• Awareness raising for the high volume of visitors on issues such as sustainability, natural resources conservation, and good visitor behaviour presents an excellent opportunity to achieve widespread impacts.

Challenges

The main challenge is dealing with the impacts from the annual pilgrimage. The mass pilgrimages that take place puts heavy strain on Park’s natural resources, yet generates no revenue for the PA to deal with this. The effective engagement of the Pagoda Management Committee and PA Management is required to support panning and management strategies to management these impacts and support conservation, local livelihood enhancement and sustainability.
Introduction

The Ayeyarwady Dolphin Protected Area (ADPA) protects 74 km of the Ayeyarwady River located in the central dry zone of Myanmar characterized by low flatlands about 200 hundred meters above sea level. The ADPA’s location is where the river is wide and straight, flowing almost due south in most areas. The river splits into numerous inlets sectioned off by sandbanks which changes seasonally.

Tourists mainly travel to the ADPA by boat starting off from the Mandalay Jetty or Mingun. If they want to do the trip in a shorter period of time tourists can also drive by car or motorbike North to one of the communities and start their boat tour from there.

Tourism Activity

Visitor Numbers

Although there are no official tourism statistics for the ADPA, estimates based on consultations with cooperative fishing villages suggest that there are about 2,300 visitors per year.

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Attractions

The main tourist attraction is the chance to see the rare and endangered Irrawaddy dolphins. Other attractions include the traditional way of life along the Ayeyarwady River that feature local methods of fishing and lifestyles that link the movement of houses/villages based on changing river and agricultural seasons.

Facilities

Currently there is no tourism-related infrastructure in the ADPA. However, there are plans to develop appropriate infrastructure to support community-based ecotourism in the five cooperative fishing villages.

Tourism Revenue Generation

There are no fees collected from tourists or tour companies visiting the ADPA. There are plans to look into the possibility of using an ADPA entrance fee for conservation of dolphins and community development initiatives.
Park Management

Structure
The Department of Fisheries deploys a small team to monitor and manage the ADPA. This includes three government staff appointed to the management team with one director and two technicians. The team is based in Mandalay at the ADPA office. There is one patrol boat, which the staff take on patrols two times per month on 5-7 day trips. The Wildlife Conservation Society (WCS) supports these activities with a team of one local WCS ecotourism project coordinator and one international ecotourism advisor working specifically on community-based ecotourism development.

Objectives
There are 6 main objectives set out in the ADPA management plan, these are to: Dramatically reduce or eliminate illegal fishing activities; Promote the long-term sustainability of the human-dolphin cooperative cast-net fishery; Protect aquatic habitat. Promote sustainable fisheries; Strengthen the Ayeyarwady Dolphin Protected Area management team and infrastructure; and Monitor the status of dolphins.

Ecology and Conservation Status

Ecology
The ADPA is home to a critically endangered population of Irrawaddy dolphins and one of only three riverine populations of the species. There are approximately 75 individuals in entire Ayeyarwady River, of which about 25 are found in the ADPA. The Upper Ayeyarwady River also hosts important birdlife including 126 species, 2 of which are endangered and 4 near-threatened species. These are also Green Peafowl, Black-bellied Tern, Black-headed Ibis, Oriental Darter, River Tern, Ferruginous Pochard, the Painted Stork, Ruddy Shelduck and the Great Cormorant.

Conservation issues
The population of dolphins in the ADPA hangs in the balance, with only about 25 individuals left. Increasing threats to dolphins include electric fishing and pollution in the river.

Local Livelihood Status
There are 40 villages in the ADPA, most relying on fishing for daily sustenance. Fishing in the ADPA is allowed through fishing concessions that are awarded by the Department of Fisheries to the highest bidder. These concessions are managed by the concessionaire and in accordance with regulations set by the Department of Fisheries. Cooperative fishermen (those fishermen who work together with dolphins to fish in a mutually beneficial manner) are the natural stakeholders in dolphin conservation since their livelihood directly depends on the existence of dolphins. Cooperative fishermen have the rights to continue fishing in concession areas. There are roughly 60 cooperative fishermen in 5 communities in the ADPA. Although these cooperative fishermen have a direct incentive to protect dolphins, their power to do so is limited due to the complexity of fishing concessions and the dangers of enforcing the law against illegal fishermen.

Role in Conservation
Communities are regularly engaged through educational programs. ADPA staff regularly visit communities to discuss issues and to educate local people about dolphin conservation. The ADPA management team has helped form cooperative fishing associations in each of the fishing communities in order to help negotiate fishing rights with the fishing concessions.
Culture

Of the 40 villages in the ADPA 5 are cooperative fishing villages varying in size but with approximately 200+ households on average. The cooperative fishing lifestyle is also threatened as it proves to be not as economically attractive as other livelihood options. As the dolphins become increasingly threatened so does the lifestyle of the cooperative fishermen.

The Burmese ethnicity retains a strong Buddhist culture in the ADPA villages. Three of the cooperative fishing villages have old temples and monasteries that would be of interest to tourists. All of the temples have interesting artefacts, including lacquer ware, historical items and old photos. Each village has a list of festivals that would also be of interest to visitors as well.

Ecotourism Role, Opportunities and Challenges

Current Role

Many tour companies already have tours going through the ADPA and Department of Fisheries already has approval process for tour companies visiting ADPA. The tourist high season coincides with the best time to see dolphins, which is in the dry season from October to March. During the rainy season it can also be quite difficult to visit some of the communities due to flooding. However, the river and the ADPA are accessible all year round.

There is a high level of awareness and experience among cooperative fishermen already involved in taking tourists to see dolphins. However, restaurants in most of the communities are quite small and not ready to accept foreign tourists. There is no accommodation in any of the communities except monasteries. The WCS project is engaging communities to develop community-based ecotourism that includes both small-scale infrastructure and training support.

Opportunities

Specific strengths of this site include: The presences of the iconic Irrawaddy Dolphin is a nearly unique selling point for this site. The cooperative fishing villages is also an interesting and somewhat unique attraction. The close proximity to Mandalay provides a great source of tourists.

The five cooperative fishing communities in the ADPA have a wealth of tourism attractions including Temples: Teak Wood Temple with beautiful lacquer ware in Myan Zun, Old Monastery in Myit Kan Gyi, and Monastery built in 1860 in Sethe, Storytellers in all five communities, 100+ year old school in Sithe, Agricultural products including a variety of beans and peanuts, Small handicrafts including traditional cigars, drums, wooden carvings, religious fans, and Festivals: pagoda festival, candle ceremony, donation festivals.

Short to medium length trip options 1-3 days; diversity of bird life; and Old temples and history of the villages along the Ayeyarwady River.

Challenges

Mandalay attracts many tourists visiting Myanmar and while this presents opportunities it also brings in competitors that are the other attractions nearby to Mandalay that tourists would be considering. It is also difficult to see the dolphins at times, and a dolphin sighting cannot be assured. The high price of the boats also makes this a relatively expensive excursion. The current difficulties with granting approval for accommodation in villages is restricting opportunities for enhanced community engagement in tourism.
Chattin Wildlife Sanctuary

Introduction:
The Chattin Wildlife Sanctuary is located about 200 km north-west of Mandalay, approximately 5 hours travel by car. Approximately 90% of the Sanctuary is covered by Indaing forest and the remaining a mix of deciduous forest and grasslands with elevations from 165-260 meters.

Tourism Activity
Visitor Numbers
In 2013 157 people visited the Sanctuary, including 2 scientists.

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Attractions
The Sanctuary's key assets are the rare deer and bird populations. Deer viewing is possible by walking, motorbikes and car. Bird viewing is available at Kye-in Lake and the Thapanseik Reservoir created by Thapanseik Dam where boast are available.

Facilities
Two guesthouses located in Tagontine camp, and one at Kye-in Lake are available for tourists. These are good for night stay but all are in need of maintenance.

Tourism Revenue Generation
There is no entrance fee collected by the Sanctuary. Fees charged for accommodation, meals, and transportation cover the costs of operation and no profit is realized.

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Fast Facts
- Date established: Gazetted as a Protected Area in 1941.
- Status: Wildlife Sanctuary
- Size of PA: 269 km²
- Number of staff: 36
- Visitor numbers: 157, for 2013
- Visitor facilities: 3 guesthouse, food service can be arranged
Park Management

Structure

The Sanctuary has a total of 36 staff including 1 Park Warden, 11 officers, 22 law enforcement rangers and part-time 2 staff. The Warden’s office is located in Kanbalu and there are 9 guard posts within the PA. The Sanctuary has four management zones, namely: Chatthin Wildlife Sanctuary, 24,166 acres; Chatthin Fuel Reserve, 29,947 acres; Chatthin Extension Reserve, 12,160 acres; and, Nyaunggon Buffer Zone 13,000 acres.

Objectives

The main management objectives of the Sanctuary are biodiversity monitoring; conservation patrolling; public awareness education; boundary demarcation; and infrastructure maintenance.

Ecology and Conservation Status

Ecology

The Sanctuary’s biodiversity includes 111 species of trees including 27 shrub species, 41 climber species, 71 herb species and 56 different types of grass. The Sanctuary is also home to 25 mammal species including 55 species of amphibians and reptiles, 65 butterfly species, 241 bird species and 48 types of freshwater fish. The rare Eld’s deer, Thamin deer, and the Brow-antlered deer are the key mammal species, while the Hooded Treepie, White-throated Babbler and White-bellied Minivet are important bird species.

Conservation Issues

Risks to the Sanctuary’s ecosystems include: hunting & collecting terrestrial animals; gathering terrestrial plants; logging & wood harvesting; and, fishing & harvesting aquatic resources – all of which are undertaken for subsistence purposes. Forest fires are also an on-going threat to the Sanctuary during the dry season.

Local Livelihood Status

There are 28 villages located around the Sanctuary, and 3 located inside the Sanctuary that existed prior to the creation of the Sanctuary. These villages comprise 5,226 households and a population of 28,500, most of whom rely on subsisting on farming, animal husbandry, hunting and casual labour for their livelihoods.

Engagement in Conservation

Ongoing environmental education initiatives in key villages and schools. 11 community forestry programmes have been initiated since 2006 with good results.

Culture

No information available
Ecotourism Role, Opportunities and Challenges

**Current Role**

Little tourism activity has taken place to date and with few prospects of product and market development any significant growth questionable.

**Opportunities**

- On the way to Chattin are Hanlin Ancient City (declared a UNESCO World Heritage Site in June 2014) and Mye-du Ancient King’s City that could add to the Sanctuary’s appeal and potentially increase visitor numbers in the future.
- A high incidence of poverty suggests local communities will seek out tourism-related employment opportunities, if available. Alternative income & employment generation should be linked to ecotourism development when ready.
- Providing infrastructure and community development and increasing local participation in environmental and conservation awareness.
- The Sanctuary’s staff are well trained on ecology and conservation issues and could perform as local guides if required.

**Challenges**

Current challenges include:

- A lack of infrastructure, especially accommodation and restaurants, few transport.
- Options to get to the Sanctuary are limited and relatively expensive.
- A lack of developed ecotourism products capable of attracting visitors.
- A lack of industry-related knowledge and skills at the destination level.

Other challenges include: potential conflicts among stakeholders and local communities, unintended disturbance to wildlife and ecosystem.
Hkakaborazi National Park

**Fast Facts**
- Date of establishment: 1998
- Status: National Park
- Size of PA: 3,812km²
- Number of staff: 23
- Visitor numbers: 23 in 2013
- Visitor facilities: None in the Park, but guesthouses and restaurants are available nearby

**Introduction**

Hkakaborazi National Park is located in Naungmung Township of Kachin State, in the northern-most township of Myanmar. The Park has an area of 3,812km² with elevations from 900m to the summit of Mt. Hkakaborazi at 5,881m, which is the highest peak in Myanmar and marks the Far Eastern Himalayas area. The Park’s topography comprises of heavily dissected series of North South mountain ranges and river valleys gouged out by glacial and interglacial forces. Lesser-known Peaks, include Mt. Gamlangrazi (5,834m) and Yuland Lashan. Steep slopes and narrow ridges characterize the entire area. The Seinghku Wang, Nam Tamai, and Taron rivers form the Southern boundary of the Park while the 5,000m mountain range forms a natural border with India and China in the West, and China to the North and the East.

The Park itself is only accessible on foot or via helicopter from Putao. While it takes around one week of walking to reach the Park from Putao, it is possible to reach Gawlei village via motorbike in the dry season, which is approximately 25km from the Park.

**Tourism Activity**

**Visitor Numbers**

Due to its inaccessibility, the Park receives few domestic or international visitors. While two visitors were recorded in 2011, none were recorded in 2012, and five international visitors and 18 domestic visitors were recorded in 2013.

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<tr>
<td>International</td>
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**Attractions**

The Park’s mountains and forest present excellent potential for trekking and other nature-based tourism activities. The farming practices and lifestyles of the different ethnic groups can also form an interesting element of any trekking or adventure tourism product in the Park.

**Facilities**

There is little tourism-related infrastructure in the Park. The nearby town of Putao has three hotels / lodges and three local guesthouses, and at least two restaurants.
Tourism Revenue Generation

No tourism-related user fees or funding mechanisms are in place.

Park Management:

Structure

The Park’s headquarters is located in Putao. There are five functional guard posts in the Park and a front office in Naungmung. Patrols operate on a 3-month rotation using the five guard posts inside the park as base points. While 63 staff positions have been identified for the Park, only 23 staff including Park Warden and 6 daily paid staff are assigned.

A five-year management plan (2013-2018) has been submitted to MOECAF. Priority programmes stipulated in the this plan include embracing wildlife and watershed management, community development, enforcement and patrolling, ecotourism development, research, and monitoring.

Three management zones have been proposed, namely: a buffer zone demarcating areas adjoining the external boundaries of the Park; a controlled use zone embracing enclaves around villages inside the Park for community utilization; and, a totally protected zone to minimize disturbance to key ecosystems. There is no ecotourism or visitor management strategy.

Objectives

The main management objectives of the Park are to maintain the present diversity of natural ecosystems and habitats in as undisturbed condition as possible; maintain viable populations of species of indigenous to the area with particular reference to Takin, Musk Deer, Red Goral and the Black Barking Deer as nationally and internationally endangered species; protect watersheds and river catchments; integrate the Park into overall development plans for the surrounding areas; facilitate access to Mt. Hkakaborazi; benefit the local people through community development activities; and, utilize the Park for purposes of education, tourism and scientific research in ways which do not conflict with the other objectives of management.

Ecology and Conservation Status

Ecology

The Park’s main forest types include: Alpine Meadow and Shrub (3,000-3,700m); Sub-alpine Conifer Forest (2,700-3,350m); Rhododendron Forest (2,400-3,000 m); Montane Wet Temperate Forest (1,800-2700m); and, Subtropical Lowland Forest (900-2400 m).

This variety of habitats support, a great diversity of plant and animal species and is regarded to be the best example of an undisturbed Eastern Himalayan ecosystem in the region. A high-level of endemism has earned recognition for the region as a conservation hotspot and a globally outstanding terrestrial eco-region. In 1997 and 1998 four new mammal species were identified, including: Blue Sheep, Gonshan Muntjac, Stone Marten and Leaf Deer. The latter being a completely new species to science. Other notable biodiversity includes: 42 mammals, including Takin, Red Panda, Shortridge’s Langur, Red Goral, Black Musk Deer, 370 bird species, including Snow Partridge, Long-tailed Rosefinch, Red-fronted Rosefinch, Brandt’s Mountain-finich and Smoky Warbler. The Park is also home to 365 species of butterflies, 74 orchids, 14 rhododendron, and 22 medical plants.
Conservation issues:
Encroachment by local communities including shifting agricultural practices, NTFP harvesting, and hunting for subsistence and commercial purposes are on-going threats to the Parks biodiversity.

Local Livelihood Status

16 villages with some 289 households and 1,751 inhabitants are located within the Park. This population depend upon subsistence farming, including shifting cultivation, animal husbandry and the collection of NTFPs (especially medicinal plants such as Shibadee (Cordyceps), Machit U, Gushar and Khandauk). Hunting wildlife for subsistence and commercial purposes is also common.

Culture

Local inhabitants belong to different ethnic groups including the Rawang, Lisu, Jimphaw, Taron and Myanmar-Tibetans. The majority belong to the Rawang ethnic group. The different ethnic groups each have their own distinctive culture, customs and traditions. As mountain peoples in a remote and inaccessible region, the cultural landscape of their villages depicted through farming practices and house construction are important tourism assets. The recent history of how Christianity has spread through the region is a similarly important story to be interpreted and explained to visitor markets.

Ecotourism Role, Opportunities and Challenges

Current Role
There have been few visitors to the Park to date and the influence of ecotourism has been minimal.

Opportunities
Although largely inaccessible, the Park has considerable natural beauty including snow-capped mountains, an interesting variety of wildlife and mountain communities. Although its key asset is Mt. Hkakaborazi (the highest point in the country and South-East Asia) other more accessible areas including Hponkanrazi Wildlife Sanctuary are competing destinations. Mountain and forest based tourism including trekking, mountaineering, wildlife spotting, local culture are additional features that can be incorporated into creating a multi dimensional and highly attractive tourism offer.

Should numbers increase, November to March will likely form the main season for trekking, nature and culture-based tours.

A high incidence of poverty suggests local communities will seek out tourism-related employment opportunities, if available. However given the very low visitor numbers to the Park, local communities have no experience or knowledge of the tourism sector.

Challenges
The main ecotourism development challenges include the lack of adequate access, facilities, development of tourism products and activities, and supporting elements such as trained guides.
Hlawga Wildlife Park

Fast Facts

- Date of establishment: 1982
- Status: Wildlife Park
- Size of PA: 6 km²
- Number of staff: 145 staff
- Visitor facilities: Restaurants, food and refreshment stalls, day use bungalows, cabins, chalets, resting huts, and sovereign stalls.

Introduction

The Park was designed and developed as a centre for environmental education and received significant investment in the early 1980s to develop facilities to support this. Located only 35 kms from Yangon the Park is a very popular site for domestic visitors seeking leisure and recreation in a natural setting.

Tourism Activity

Visitor Numbers

Domestic visitors account for 95% of all visitors. In the first seven months of 2014, the Park received a total of 189,101 visitors, representing an overall increase of over 85% compared to the same period in 2013. The high season runs from October to March with around 25,000-37,000 visitors per month. June to September is the low season with around 10,000-20,000 visitors per month.

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<td>International</td>
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Attractions

The Park’s cool and quiet forests, animal viewing opportunities, recreational options and facilities attract visitors from Yangon looking for rest and relaxation; and making Hlawga Park one of Myanmar’s most visited protected areas. Visitors can drive their cars along the Park’s 7km road circuit, or join a safari-bus service provided by the Park.

Facilities

The Park has 3 small simple restaurants, 6 bungalows, 2 log-cabins, 3 chalets, 17 traditional huts and a viewing tower. The mini zoo has a simple interpretation centre featuring displays of stuffed birds and animals, as well as basic signage and interpretation plaques set up around some of the zoo’s attractions include reptile, bird and bear enclosures.

Tourism Revenue Generation

The site is managed as a visitor attraction, under contract with a private company. Visitor fees include admission fees (1,000...
kyat for domestic visitors and 5,000 kyat for internationals); and, resting facilities rented for day use only range from 3,000-25,000 kyats per day. Restaurants and food/souvenir stalls pay an annual concession fee for permission to operate in the Park. The Park generated approximately $36,000 in 2014.

Management

Structure

The Park has three management zones: the Mini Zoo with an environmental education centre and park management facilities); a Wildlife Park with restaurants, accommodation, and safari tour; and, the Bufferzone providing forest protection and propagation areas. The Park is staffed by a Warden, 14 managers and assistants, 29 administrators, and 101 guards and service employees. In 2010 MOECAF signed a 15-year lease agreement handing Park management responsibilities to the Htoo Foundation

Objectives

Management objectives of the Park include providing environmental education services; establishing a representative collection of Myanmar’s indigenous plants and wildlife; and, protecting forest and plant cover around Hlawga Lake.

Ecology and Conservation Status

Ecology:

The Park’s natural landscape consists of semi-evergreen forest, mixed deciduous forests, and swamp forests. These habitats support around 295 plant species, including 108 types of trees. Notable wildlife in enclosures including elephants, bears, macaques, and Eld’s deer, sambur, hog’s and barking deer. There are also 150 bird species, 3 species of reptiles and amphibians, 23 species of fish and 103 species of butterfly. Much of the Park’s larger fauna live in captive or semi-captive enclosures.

Conservation issues:

- Overpopulation of non-native macaques
- Visitor littering and improper feeding of wildlife
- Visitors missing wildlife and conservation awareness raising opportunities

Local Livelihood Status

Ten villages with a population of approximately 14,400 people are located around the Park. These communities are primarily farmers who occasionally harvest various NTFPs from the Park, including bamboo shoots, leaves, mushrooms and vegetables. For the most part these practices are considered sustainable.

Culture

No information available / not relevant to this site
Ecotourism Role, Opportunities and Challenges

**Current Roles**

Hlawga is one of the most popular and well known protected areas in the country. However, the dilapidated state of some facilities and outdated educational materials have led to the Park functioning more as a site for casual relaxation and entertainment rather than a quality ecotourism destination.

**Opportunities**

Hlawga’s original objectives remain its greatest opportunity. Given its proximity to Yangon and popularity there is considerable potential for Hlawga to re-establish itself as a flagship conservation awareness raising attraction. A business plan to upgrade facilities, and develop education-based activities that are more active, interactive and geared towards youth and families would generate an increase in visitor arrivals and spending, while supporting increased opportunities for local economic development and significant broad-based environmental education.

The Park is economically viable and supports a broad range of income earning and revenue generating opportunities.

**Challenges**

Park management and key stakeholders need to recommit themselves to the restoration of Hlawga as Myanmar’s preeminent focal point for broad-based environmental awareness-raising. This vision needs to be supported through the commissioning of a comprehensive Park Management plan based on international good practice made appropriate and viable for the Myanmar context. This plan also needs to include specific strategies to ensure profitability of operations, reinvestment of proceeds into conservation initiatives (such as the issue with the macaques), visitor awareness and impact management, and opportunities to further support local livelihoods through employment and supply chain development.

Without such a plan it is possible continued existing practices may lead to an increase in negative environmental impacts, further site degradation and a missed opportunity to maximise profitability.
Introduction

Hponkanrazi Wildlife Sanctuary (HPWS) is located in Putao and Naungmung Townships of Kachin State. The Sanctuary covers an area of 2,760km² with elevations from 590-5,506m. Together with three other contiguous protected areas (Hkakaborazi National Park, Bumphabum Wildlife Sanctuary and the Hukaung Valley Wildlife Sanctuary) form the Northern Forest Complex an area covering 30,269 km² and constituting some of the largest contiguous expanses of natural forest remaining in the region. The HPWS supports largely intact vegetation over a wide altitudinal range. Famous mountains inside the Sanctuary include Mt. Hponkan Razi (3,506m), Mt. Madwe Razi (4,602m), Mt. Hponyin Razi (4,283m) and Hpangram Razi (4,330m). The main watersheds are defined by three main rivers, the Namlang, Namyin and Malikha.

Access to the Sanctuary is via a 22km unpaved road from Putao to Upper Shan Gaung which borders of the wildlife sanctuary. Road construction has commenced on the 16km. path to Wasandam, but is still uncompleted. A wide footpath remains and the walking time between these villages is around 6-7 hours. Wasandam to Ziyadam is also around 16km.

Tourism Activity

Visitor Numbers

Visitor numbers are generally low with overall arrivals increasing from 61 in 2009, to 134 in the first seven months of 2014.

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<td>14 Jan-July</td>
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<tr>
<td>International</td>
<td>0</td>
<td>7</td>
<td>120 Jan-July</td>
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 Attractions

The Sanctuary’s mountainous landscapes, largely intact ecosystems and diverse flora and fauna, including key species outlined above, are primary assets together with its indigenous mountain communities. The Sanctuary is the most accessible of the Northern Forest Complex’s protected areas.

Facilities

While there is minimal tourism-related infrastructure in the Sanctuary, two trekking companies are investing in local lodges in Upper Shan, Wasa Dam and Zeya Dam, that currently take the form of local houses adapted with separate rooms with
mattresses on the floor with mosquito nets. Putao has three hotels/lodges and three local guest-houses, and at least two restaurants.

**Tourism Revenue Generation**

No tourism-related user fees or funding mechanisms are in place.

**Park Management**

**Structure**

The Sanctuary is overseen by the warden of the Hkakaborazi National Park. The Sanctuary is deemed to need 26 staff yet none have been appointed.

**Objectives**

To maintain the present diversity of natural ecosystems and habitats in as undisturbed condition as possible; maintain viable populations of species of indigenous to the area; protect watersheds and river catchments; integrate the Sanctuary into overall development plans for the surrounding areas; benefit local people through community development activities; and, utilize the WS for purposes of education, tourism and scientific research in ways which do not conflict with the other objectives of management. There is no ecotourism or visitor management strategy.

**Ecology and Conservation Status**

**Ecology**

The Sanctuary's vegetation hosts diverse vegetation types such as tropical moist forest, subtropical moist hill forest, temperate forest, deciduous forest and alpine forest in the higher altitudes. The Sanctuary is dominated by the tropical moist forest vegetation, bamboo, rattan and wild bananas. Significant mammals include Red Goal, Takin, Eastern Hoolock Gibbon, Clouded Leopard, Chinese Pangolin, Black Bear and Bengal Slow Loris. 310 bird species have been recorded including Blyth's Tragopan, Rufous-necked Hornbill, Ibisbill, Blyth Kingfisher, Beautiful Nuthatch, Greater Rufous-headed Parrotbill, Alpine Accentor and Plain Mountain Finch.

**Conservation issues**

Encroachment by local communities including shifting agricultural practices, as well as NTFP harvesting and hunting for subsistence and commercial purposes are the main on-going threats to the Sanctuary's biodiversity.

**Local Livelihood Status**

2005 survey data recorded 270 households and a population of 1,639 people dispersed among 13 Lisu and Rawang villages inside the Sanctuary. Local people depend upon subsistence farming, animal husbandry and the collection of NTFPs (especially medicinal plants such as Shibadee (Cordyceps), Machit U, Gushar and Khandauk), as well as hunting wildlife for subsistence and commercial purposes.

**Culture**

The Rawang and Lisu ethnic groups each have their own distinctive culture, customs and traditions. As mountain peoples
in a remote and inaccessible region, the cultural landscape of their villages depicted through farming practices and house construction are important tourism assets. The recent history of how Christianity has spread through the region is a similarly important story to be interpreted and explained to visitor markets.

Ecotourism Role, Opportunities and Challenges

Current Role
There is minimal tourism activity inside the Sanctuary. Numbers are however susceptible to the States ongoing civil conflict.

Opportunities
Trekking tours through villages need to be planned and managed in a sensitive manner with inputs by experienced product development specialists. The farming practices and lifestyles of the different ethnic groups are an important element of the Sanctuary’s trekking and adventure tourism products.

While access issues are likely to limit visitor numbers in the short term, Hponkanrazi WS is more accessible than Hkakaborazi NP and has comparable natural beauty including snow-capped mountains, a wide diversity of flora and fauna and its mountain communities. Should access to Hkakaborazi NP improve, it will increasingly compete with Hponkanrazi WS as the preferred northern-most destination with its status as being home the highest mountain in the country and SE Asia.

Challenges
The main ecotourism development challenges include difficult access, low visitor numbers, lack of adequate infrastructure, and high seasonality factors. Other factors that need to be addressed include the lack of industry-related knowledge and skills at the destination level, potential conflicts among stakeholders, local communities and tourist, unintended disturbance to wildlife and ecosystem and possibly an increase in wildlife trade & consumption.
Indawgyi Wildlife Sanctuary

**Introduction:**
Indawgyi Wildlife Sanctuary is located in Mohnyin Township of Kachin State. The Sanctuary can be accessed from Myitkyina town, which is around 120km from the lake. From Myitkina train options are available for part of the journey, as are local bus services. Both options are time consuming. The driving time from Myitkyina to the Sanctuary is around 8 hours.

**Tourism Activity**

**Visitor Numbers**
While there are no records of domestic visitors to the Sanctuary, numbers would be relatively high as the Pagoda on the lake is a key pilgrimage site. There were 34 and 17 international tourists to the Sanctuary in 2011 and 2012 respectively, and 39 visitors in the first four months of 2014.

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**Attractions**
Indawgyi Lake is the largest lake in Southeast Asia and an attractive destination for both domestic and international visitors. The Sanctuary is home to a wide range of biodiversity, most notably rare birds, and it is an internationally recognized birding area. The Sanctuary also contains the important The Shwe Myitsu Pagoda that draws significant numbers of worshipers during the main festival periods.

**Facilities**
The Sanctuary has two tourist guesthouses that are able to accommodate 11 & 5 people. During busy periods, tourists can also stay as guests in the villagers’ houses. There are motorboats to travel around the lake. At Lone Tone village there are kayaks and bicycles available for rent.

**Tourism Revenue Generation:**
No fees are collected from visitors to the Sanctuary.

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**Fast Facts**
- Date of establishment: 1999
- Size of PA: 815km²
- Number of staff: 25
- Visitor numbers: Domestic, International
- Visitor facilities: Guesthouse and restaurants
Park Management:

**Structure**

The Sanctuary has a total of 25 staff split between a head office and three ranger posts located around the lake. The Warden’s office is situated in Monyin, Ranger posts are located in Lone Tone, Nantmon, and He’ pu villages. The Sanctuary has three management zones each with specific management priorities. Zone 1 consists of the lake and 260kms of swamp to control fishing and ensure areas are managed for species protection; Zone 2 includes the Nant Kha and Mine Naung Forest Reserves to manage forest use; and, Zone 3 consists of the Indawgyi, Nant Moon and Muso Forest Reserves and focuses on reducing shifting cultivation and the management of timber and NTFPs consumption.

**Objectives**

The overall management objectives of the Sanctuary are to maintain the watershed of South-East Asia’s biggest lake; protect native and migratory birds; conduct research; and, develop ecotourism.

**Ecology and Conservation Status**

**Ecology**

The Sanctuary is comprised of evergreen forest (riverine), mixed deciduous forest (bamboo) and hill forest (pine forest). There are 85 species of plants (56 are indigenous), 11 species of bamboo, 14 species of grass, 5 species of cane and 70 orchid species. The Sanctuary’s fauna includes 37 species of mammal, 350 forest birds, 99 water-birds (including the White-bellied Heron, Woolly-necked Stork, White-back Vulture, Red-neck Crane), 80 species of fish and 50 species of butterfly.

**Conservation Issues**

There is over-dependence by local communities on the Sanctuary’s natural resources that includes encroachment for farming overfishing, and the unsustainable collection of NTFPs. Hunting is also practiced for subsistence and commercial purposes.

**Local Livelihood Status**

There are 36 villages around the lake with some 7,608 households and a total population of 47,953 people from the Shan, Kachin, Bamah, Kadu and Kanan ethnic groups. Subsistence farming including animal husbandry is undertaken around the Sanctuary and harvesting of NTFPs and hunting occurs within the Sanctuary. Other livelihood activities include: wood, firewood and bamboo production; fishing; commercial trading; casual labour; and, gold & jade mining.

**Engagement in Conservation**

Forest User Groups have been formed and community awareness programmes are undertaken.

**Culture**

The different ethnic groups each have their own distinctive culture, customs and traditions. The Shwe Myitsu Pagoda, positioned on an island close to Nam Tay village, is an important pilgrimage site. Pilgrims flock to the site for the Shwe Myitsu Pagoda Festival, held during the week before the full-moon of Tabaung (March) when waters are low enough to allow pilgrims to walk along a seasonal causeway to the Pagoda.
Ecotourism Role, Opportunities and Challenges

Current Role

Apart from the Pagoda festival, there is minimal tourism activity inside the Sanctuary. In November 2013 a report titled "Ecotourism for Wildlife Conservation in Indawgyi Lake Wildlife Sanctuary: Actions and Recommendations" was prepared by MOECAF, BANCA, FFI and PRCF Myanmar. The report identified a series of actions and recommendations that are currently under implementation, including promotion and English language training. No tourism-related user fees or funding mechanisms are currently in place.

Opportunities

As the largest lake in Myanmar and SE Asia the Sanctuary has some good opportunities to support tourism development, include it's listing as an ASEAN Heritage Park and Ramsar site denoting it as an important birding area.

A high incidence of poverty suggests local communities would seek tourism-related employment opportunities if available. Many young people participated in the development of the ecotourism action plan.

Challenges

Access is a key restraint limiting tourist arrivals. The costs of travel can be prohibitively expensive for some visitors, while the travel time dissuades others from visiting. The site also lacks any truly unique qualities to overcome these travel time and cost factors. Given the very low visitor numbers to the Park, local communities have gained little experience or knowledge of the tourism sector.
Inlay Lake Wildlife Sanctuary

**Introduction:**

Inlay Lake Wildlife Sanctuary is located in Nyaungshwe, Pinlaung and Pekon Townships of Shan State. The Sanctuary is located on the Shan plateau in the Thanlwin river basin, with elevations from 830-1,270m. Inlay is a shallow natural lake resting in a broad valley between two limestone ridges covered by forested hills. It is famous for its traditional floating agriculture and is also a major source of hydropower for Myanmar.

The Sanctuary is accessed via Heho airport a 40 minute drive from Nyaungshwe. Road connections are generally good to Yangon, Nay Pyi Taw and Mandalay, and there are also rail connections to these cities.

**Tourism Activity**

**Visitor Numbers**

International visitors to the Sanctuary have increased more than four-fold since 2009, reaching a peak of 108,711 in 2013-14. Forecasts predict this number may double by 2016-17. While data for domestic visitors is unavailable, estimates suggest arrivals are likely to be double the number of international arrivals. The data is however for visitor arrivals to the Inlay region, rather than to the Sanctuary per-se. Nevertheless, it is highly likely that the great majority of these arrivals will also be visitors to the Wildlife Sanctuary.

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<td>Interna</td>
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**Attractions**

Key tourism assets in the area include the beauty and sanctity of the lake and it’s natural and cultural surroundings. Other specific assets include: the famous floating gardens; a rotating 5 day market; the Indien Pagoda Complex and Phaung Daw Oo Pagoda; local villages of NgaHpeKyaungMonastery;Ywama, Nampan and the Red Mountain Winery.Key natural resources that could attract ecotoruists include the large population of migratory and resident birds, native aquatic plants and freshwater fishes.

**Facilities**

Nyaungshwe, which sits on the Sanctuary’s border, is the main service town for the lake with around 26 hotels and
guesthouses, and another 15-20 currently being developed. There are also 16 hotels within the Sanctuary itself and 14 additional land leases within the Sanctuary under development. There is a hotel zone planned for de-gazetted land formerly under MOECAF’s jurisdiction, with plots for up to 90 hotels. In total there are approximately 2,500 hotel rooms with potential to increase to around 7,500 over the short to medium term. There are around 9,000 boats of all types used for transporting people and commodities around the lake, of which around 6,000 are used to transport tourists. Roads around the lake are generally in poor condition and in need of upgrading.

**Tourism Revenue Generation**

An Inlay Lake visitor entry fee of $10 per international visitor is collected by the State government, but it is yet to be determined how this fund will be used. The Wildlife Sanctuary does not currently benefit from entry fee. There is no direct connection between the income received from leasing MOECAF land for the 16 hotels around the Sanctuary, and the annual budget allocated to the Sanctuary’s management operations.

**Park Management**

**Structure**

The Administration Office of the Sanctuary was set up in Nyaungshwe in 1990. In addition to the Warden’s office in Nyaungshwe, there is also an administration office in Pekon and guard posts in Nan Thae and Shwe Yan Pyae.

The Sanctuary is composed of three management zones, including a: Core Area (72,100 Acres) consisting of the water body of Inlay Lake, including villages on the lake, floating gardens, wetland areas, and alluvial soil areas; Buffer Zone (281,800 Acres) consisting of Nyaungshwe Township and paddy fields, forests, Taungya, villages and catchment areas of Inlay lake; and, Remote Area (1,032,850 Acres) embracing the head water area of Inlay lake beyond the core and buffer areas.

Management activities for each of the three zones are listed in MOECAF’s 2010-11 to 2014-15 “Action Plan for Environmental Conservation and Sustainable Management of Inlay Lake”. Since 2000, five-year plans have been developed for the conservation of forests, land and water resources, wildlife and birds. Public awareness raising and community-based resource management programmes are part of these plans. The 2015-2020 five-year management plan is currently being prepared.

**Objectives**

Management objectives are to: conserve the ecosystems and biodiversity of Inlay Lake and its surrounding watersheds; protect indigenous and migratory birds and their habitats; and, engage local communities in conservation and ecotourism-related activities.

**Ecology and Conservation Status**

**Ecology**

In terms of fauna, there are estimated to be: 345 bird species of birds (191 forest birds & 80 water-birds); 94 butterfly species; 20 snail species; 59 fish species (16 are endemic to Inlay Lake); 25 amphibian species; and, 3 tortoise species.

In terms of flora, there are estimated to be: 86 tree species; 527 medicinal plant species; 11 bamboo species; 184 bamboo species; and, 12 algae species.
Globally threatened birds include: Oriental Darter; Ferruginous Pochard; Black Headed Ibis, and, Black bellied tern. Vulnerable birds include: Eastern Sarus Crane; Baeer’s Pochard; Indian Skimmer; and the Greater Spotted Eagle. In addition there are 14 globally endangered species that migrate to the Lake.

**Conservation Issues**

Environmental degradation linked to a variety of sources is a very significant issue affecting the long-term sustainability of the Lake. Declining ecosystem health also threatens social well-being and the base of local economies. While increasing tourism pressures are an emerging threat, the sector also offers opportunities for more sustainable approaches to protected area management, and the environmental services provided by the Lake and its watershed.

**Local Livelihood Status**

The Sanctuary rests within three townships. It is estimated between 60,000-100,000 people live on the Lake itself, it is not clear how many villages or households reside within the Sanctuary’s watershed areas. While the majority of Nyaungshwe Township’s population reside within the Sanctuary, this is not the case for Pinlaung and Pekon Townships. Nyaungshwe Township has a population of around 172,469 people, 6% of which are urban and 94% rural. Pinlaung Township has a population of around 162,537, 97% of which are rural people. Pekon Township has a population of 94,226, 87% of which are rural people. Subsistence and commercial farming including shifting agriculture, floating gardens, animal husbandry and fishing are undertaken in and around the Sanctuary.

**Engagement in Conservation**

The Sanctuary has an on-going community engagement programme with current activities focused on: stopping battery-shock fishing methods; joint patrolling of the fishing free zone; community education programmes; an agricultural extension program; a public awareness special event day programme; engaging stakeholders and local NGO in research programmes; land-use management programme (with relevant government departments); a community fishery programme; a young men’s biodiversity conservation training programme; and, a media programme.

**Culture**

The area is populated by a variety of ethnic groups including Bamar, Danu, Innhtar, Pa-O, Palaung, Shan, Taunggyo, Akha, Kayaw, Lahu, Lisu and Padaung. The traditional cultures of this populous area with its diverse ethnic groups are distinctive features of the destination. The Sanctuary’s cultural landscape embraces, for example, farming on the lake, unique fishing practices, contrasting house-building styles, monasteries & pagodas, festivals, textile and handicraft production.

**Ecotourism Role, Opportunities and Challenges**

**Current Role**

Inlay Lake is one of Myanmar’s top four flagship destinations and is positioned internationally as one of southeast Asia’s renowned destinations. The main tourist season is November to March during the dry winter months and around key festivals. The destination has a substantial visitor economy with supply chains linked to various sub-sectors including accommodation, restaurants, tour-guiding, retail, transport, handicrafts and the construction industry.
Opportunities

Although Inlay Lake has an established tourism industry, with a high level of local engagement in direct and indirect supply chains, not all people benefit, and many locals receive few direct benefits. In general tourism appears to be well received and is seen as a way of generating more income and improving livelihoods.

Challenges

Inlay Lake’s ability to continue to compete as a flagship destination will depend upon: the perceived value for money of its accommodation sector; the extent to which service providers are able to diversify the product offering; overcrowding and congestion issues; and, the overall health of Sanctuary’s ecosystems.

Serious environmental issues on Inlay Lake and in the surrounding hills, Lack of trained and skilled tourism resources, Insufficient infrastructure, public service, financial systems, mobile and technology support, Weak regulatory environment, Insufficient coordination among key stakeholders, Security issues in some areas (Pa-O, Kayah), Seasonality.
Kyaikhtiyo Wildlife Sanctuary

Introduction

Kyaikhtiyo Wildlife Sanctuary is located approximately 190 kms from Yangon and readily accessible from located close to the proposed East-West economic corridor connecting Yangon and Bangkok. The sanctuary covers an area of 156km2 with elevations from 50-1,090m. and contains evergreen and mixed deciduous forest cover. The Sanctuary was originally established to protect the globally threatened Leopard, Serow and Goral. The sanctuary also surrounds the Kyaikhtiyo Pagoda and Golden Rock sites and an access road that are technically excluded from the Wildlife Sanctuary.

Tourism Activity

Visitor Numbers

The Pagoda receives approximately one million domestic and 30,000 international visitors per year. The great majority of the visitors are pilgrims arriving during the full moon cycles. Visitor volumes are reported to be a growing issue during the main pilgrimage period (October-March), which reaches its peak around the December full-moon when 100,000 people flock to the site. No data profiling monthly visitor arrivals to the Wildlife Sanctuary is available. Although no data is available on the number of visitors to the Wildlife Sanctuary over recent years, some 46,819 visitors were recorded in the first seven months of 2014.

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Attractions

Kyaikhtiyo Pagoda is Myanmar’s third most important Buddhist pilgrimage site, and the area’s primary visitor attraction. A 15km road carries visitors from the base to the summit of the Pagoda site. Recreation and entertainment options also include visiting lesser pagodas and natural sites such as Koehawin waterfalls. While resident wildlife, most notably leopards and clouded leopards, could be promoted to attract visitors into the Wildlife Sanctuary, this approach has not been taken to date.
Facilities
At the summit and near to the Pagoda there are four main hotels, approximately 25 guesthouses, 78 zayats (Buddha hall, rest shelters), approximately 100 eating establishments, and souvenir shops. There are also around 1,000 market stalls and refreshment stops along the access routes to the summit and Pagoda site. There is a rapidly growing number of accommodation and restaurants at the bottom of the mountain in Kinpin Village where the Sanctuary’s Administration Office is located. Construction of a cable car to the top of the mountain has recently been announced.

Tourism Revenue Generation
The PAs does not collect visitor fees and currently receives little/no revenue from tourism economy. The Kyaikhtiyo Pagoda Trust Committee collects fees for visiting the Pagoda. The 3 main hotels at the pagoda site are leased from MOECAF and the MOHT. Restaurant and vendors rent their business space from the Pagoda Trust Committee. Local income earning opportunities in the tourism economy are mostly from providing vending, restaurant, and other services (porting).

Park Management

Structure
The Sanctuary is managed by a warden, 2 rangers, 2 foresters, 1 forest guard and 7 office staff. The management office is located at Kamonchaung, 2km from the Sanctuary.

Objectives
The overall management objectives of the Sanctuary are to conserve the natural landscapes, ecosystems and biodiversity surrounding Kyaikhtiyo Pagoda. Other objectives include promoting environmental awareness raising and involving the township and local communities in conservation efforts.

These objectives are challenged by the fact that the Sanctuary has no management authority over the main pagoda site and access road and some other minor pagodas, some of which are technically in the PA.

Ecology and Conservation Status

Ecology
The Sanctuary is home to 23 species of tree, including 10 species of bamboo, 3 species of rattan and 13 medicinal plant species. Fauna in the Sanctuary include 20 mammal species, over 150 bird species, 34 species of reptiles and amphibians, and 445 species of butterflies.

Conservation Issues
Main risks include the illegal harvesting of bamboo and poles for housing, market stalls, walking sticks and working tools, and the poaching of Barking Deer and Wild Boar by local hunters. Forest fires caused by careless visitors during the dry season is also a growing issue. Patrols to guard against illegal harvesting of flora and fauna and hunting for both subsistence and commercial purposes. The presence of leopards and other important species in the Sanctuary is uncertain.
Local Livelihood Status

There are no villages inside the Wildlife Sanctuary. However, villages located near the Sanctuary practice subsistence farming, animal husbandry. There is also some harvesting of NTFPs and hunting that occurs within the Sanctuary. Involvement in tourism supports or supplements many family incomes and includes activities such as: selling NTFPs, wildlife products, refreshments, souvenirs and walking sticks to visitors; carrying tourists, their belongings, and materials to the summit; and selling vegetables and local produce to restaurants and hotels at the Pagoda and from Kinpun town and along routes to the top of the mountain. Poverty and low education present significant, underlying development challenges that need to be addressed to enhance local livelihoods.

Culture

The Kyaikhtiyo Pagoda is Myanmar’s third most important Buddhist pilgrimage site after the Shwedagon and Mahamuni Pagodas, and is the site’s principal cultural heritage attraction.

Ecotourism Role, Opportunities and Challenges

Current Role

To date ecotourism has remains underdeveloped in the PA with most visitor activity associated with pilgrimage (spiritual) tourism. While there is potential for ecotourism development in other sites in the PA these have yet to be established. Conservation and social concerns are evident, ranging from negative impacts from mass-tourism that includes, crowding, littering, waste management, sustainable supply chains. Social equity and fair sharing of costs and benefits is still to be established. These are good indications that local limits of acceptable change on occurring and that tourism/visitor activity here might not be sustainable.

Opportunities

The high level of visitors, good access, and rich biodiversity provide excellent opportunities for diversifying tourism products and other attractions, including local livelihood enhancement opportunities and supporting broad-based awareness raising.

Challenges

Waste management is an important issue that can also be easily readily rectified with quick results if endorsed by the appropriate stakeholders. Collaborative management and balanced stakeholder engagement is missing and required. Issues that need to be addressed include master and site planning and management and sustainable and equitable cost and revenue sharing.

The recently announced cable car presents both challenges and opportunities. If developed in a responsible manner the cable car could reduce some environmental impacts, increase numbers of visitors and add to the attraction of the destination. If improperly developed the cable car could generate considerable environmental and social impacts, and cheapen the attraction and sanctity of the site. A sufficient waste management system needs to be in place before any consideration of attracting more visitors.

Ways Forward

- Visitor impact management Address the extremely poor waste, wastewater and sewage waste management practices, Weak on-site visitor management regulations.
- Conservation/Sustainability awareness raising A sustainability awareness raising campaign/strategy could be delivered
to the “masses” of visitors while on site. This could lend support to overall understanding and appreciation for being personally more responsible in terms of more sustainable living.

• Supply chain enhancement and sustainability Further research is required to determine the sustainability of current tourism products and determining how to maximize local economic development opportunities through these supply chains. Given the size of the visitor/tourist markets demands even marginal changes can generate significant impacts.

• Product diversification There is good indication that there are still some quality resources and sites within the PA that could be developed for ecotourism purposes. These would need to be developed with engagement of tour operators/likeminded investors from stat start. It is foreseeable these groups would only be interested if their investments would be protected and confirmed by a sound and solid Management Plan.

• PA management and tourism planning (Master and Site Plans) There is a strong need to a better, comprehensive, strategic and inclusive management plan for the PA that should include more defined zoning and investment/development criteria and standards for each zone/site. Without such a plan (and enforcement) the PA and it’s assessments remain at risk for poorly planned, unsustainable development.
Lampi Marine National Park

**Introduction**

Lampi Marine National Park (LMNP) is located in Boke Pyin Township of Tanintharyi Region. The Sanctuary covers an area of 205 km² with elevations from 0-455 m. The Park encompasses a section of the Myeik Archipelago that includes Lampi and several smaller islands and the seas around them. The sea between Lampi and the mainland is on average 12 m deep and nowhere deeper than 24 m. Lampi Island is hilly and rises steeply from sea level. While the majority of the coast is rocky, there are several sandy beaches, bays and inlets. Lampi Island has two major perennial rivers and many small seasonal streams. Lampi natural environment is mostly intact.

Kawthaung has an airport with daily flights to and from Yangon. From Kawthaung there are two options to reach the Park: a boat journey direct to Lampi (6-8 hours with local boats), or car to Aung Bar village (2.5 hours drive, partially rough road) with a 1-2 hour boat ride to Lampi.

**Tourism Activity**

**Visitor Numbers**

No data is available for visitors to Lampi. Data is gathered for visitors to the archipelago as a whole, and there were approximately 1,000 visitors, mostly international, per year for each of the last three years. Most visitors arrive on boat / yachts from Thailand.

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**Attractions**

Lampi Marine National Park’s main attractions are the unique seascapes, landscapes and local livelihoods of the area. Corals and tropical/pelagic fish attract divers and snorkelers. The Park’s 228 bird species can attract birdwatchers from all over the world (the roosting site of plain-pouched hornbill close to Ko Phawt island offers views of hundreds of hornbills twice a day). Sea turtle nesting sites, if properly protected, can also become another visitor attraction. White sandy beaches and expansive Mangrove forests contribute to the Park’s attractiveness.
Facilities
There is little tourism-related infrastructure in the Marine National Park. Only two of the archipelago’s islands have tourism-related accommodation. There are simple hotels/guest houses in Kawthaung. MOECAF recently issued a tender for building accommodation in Lampi Marine National Park, and a number of proposals are currently being reviewed. Agreements to open 1-2 resorts/hotels on other islands are being negotiated.

Tourism Revenue Generation
No entry or tourism-related user fees are in operation.

Park Management

Structure
The Park has a park warden, range officer, 2 rangers, 3 foresters; a forest guard, a clerk and four daily labourers. This structure may change in the near future with the approval of the new management plan. While the Park headquarters is located in Boke Pyin on the mainland, there is a ranger post in Makyone Galet that will also become a visitor and education centre.

Objectives
The Park’s first 4-year management plan (2014-2018) has been prepared with a participatory approach and was submitted to MOECAF in July 2014. It includes a zoning plan and an action plan with 4 main working areas, namely: park operations; ecosystem management; community outreach; and, tourism management. The zoning system identifies 4 management zones: 1) Key resource zone, 2) Wilderness zone, 3) Cultural zone, 4) Local use zone. A Buffer zone was proposed at the time of the designation of LMNP but it is not yet officially recognized.

Ecology and Conservation Status

Ecology
The Park protects a variety of different habitats (evergreen forest, mangrove forest, beach and dune forest, coral reefs, seagrass) and a rich biodiversity that includes: 195 plant species of the evergreen forest; 63 species typical of the mangrove forest; 19 mammals; 228 birds; 19 reptiles; 10 amphibians; 42 fish; 42 crab; 50 gastropods; 41 bivalves; 35 sea-cucumber (holothurians); 73 types of seaweed; 11 seagrasses; and, 333 plankton species. Additional species are likely to be identified with further surveys.

Conservation issues
As the local population and human activity increase inside the park so does incidents of illegal hunting (mousedeer, wildpig, monkeys, civet), illegal fishing, overharvesting of marine flora and fauna (including sea cucumbers, sea shells, etc.) and illegal logging for house and boat construction. Yet the most pressing threats come from the commercial exploitation of the resources, such as: forest clearing for plantations on the minor islands (rubber, beetle nut, cashew nut, etc.); dynamite fishing and trawlers that damages coral reefs inside and outside the park; heavy commercial fishing in the water surrounding the MNP; and, illegal trade of freshwater to the fishing boats and Wa Kyunn fish factory. While tourism activity is currently limited to live-aboard cruises, boats regularly drop their anchors on coral reefs causing damage. Tourism-related impacts are likely to increase dramatically in the near future with the construction and operations of planned resorts.
Local Livelihood Status

There are 4 villages in the Park and a fifth located in the proposed buffer zone with a total of 598 households. Makyone Galet with 147 households is the main settlement, and only officially recognised village in the Park. Others villages include Ko Phawt that has 51 households, Sitta Galet with 40 households, War Kyun 271 with and 148 in the dry-season, and, Nyaung Wee in the buffer zone with 89 households. War Kyun is a settlement set up around a fish & ice factory. The other three villages were considered temporary until 2008.

The main livelihood activity is fishing, followed by trade, farming, logging and hunting. In terms of ethnicity, the Bamar are the majority of the population. With few development opportunities available to them, the Salone people are prone to alcoholism, drug abuse, intermarriage with Bamar and, due to marginal returns from fishing, loss of boats and marine knowledge. Other important issues linked to economic development in the archipelago include: migration of opportunity seekers from the mainland, increased fishing vessels and a consequent decline of stock, and an increase in some illegal activities.

Culture

In terms of ethnicity, the Bamar are the majority of the population. Only about 100 indigenous Salone households live inside the Park. A few migrants are Mon and Karen. The Salone/Moken are an indigenous population from aboriginal Malay stock. The Moken (as they call themselves or “Salone” as they are called in Myanmar) have lived in the Myeik Archipelago since the last century, roaming the sea from island to island, collecting and trading sea products. Now they live permanently in Makyone Galet and Nyaung Wee where they have built their houses on stilts.

Ecotourism Role, Opportunities and Challenges

Current Role

The main season for visiting the Park is from November to May. Heavy rains and rough sea can disrupt travel to and from the islands during the rainy season (May to October). Most tourists arrive by live-aboard boats with most trips to the MP arranged by tour companies based in Thailand. Despite the relatively strong visitor numbers tourism doesn’t play a considerable role in the local economy at this stage.

Opportunities

Future ecotourism development should seek to take advantage of the Park’s potentially high quality marine and coastal tourism linked to heritage and designed to connect tourism to supporting local livelihoods and conservation. Key attractions for this site include the renowned natural beauty of forests and seascapes of this relatively undisturbed site, the Salone/Moken culture, and it’s status as an ASEAN Heritage Park the only marine national park in Myanmar.

The Myeik Archipelago is generally viewed as an area of high tourist interest, with unspoiled beaches and rich marine resources compared to similar destinations in Thailand. While Thailand’s Surin National Park offers similar natural and cultural attractions (islands, reefs, Moken/Salone village) the added values of Lampi are its unique landscapes and seascapes, and the presence of different habitats (mangroves, tropical evergreen forest, beach and dune forest coral reefs, seagrass) within the Park’s boundaries. In particular, mangrove forest, although minor in terms of extension, is in almost intact conditions with high ecological value.

Local communities have an opportunity to be actively engaged in a variety of tourism-related income and employment activities. It is not clear how many of the businesses operating in this area are owned or managed by local people, or what percentage of the opportunities available are being taken up by families moving into the area.
Challenges

• Ensuring responsible tourism development that mandates strict environmental protection measures and targets local economic development as key objectives of the tourism sector is the greatest overall challenge faced by the Park.

• Other important issues that need to be addressed include: the lack of infrastructure and facilities for tourism services & hospitality as well as communication and emergency situations, the difficult & time consuming access, the lack of rule enforcement, the lack of industry-related knowledge and skills at the destination level, and the high seasonality of tourism.

• Working with local communities is also a complicated by the transient and unstructured nature of many of the social groups that are reliant of the Park’s resources.
Lawkanada Wildlife Sanctuary

**Introduction**

Lawkanada Wildlife Sanctuary is located in Nyaung Oo Township, around 11km from Nyaung-U (Bagan) and adjacent to New Bagan. The Sanctuary, situated on the banks of the Ayeyarwaddy River and comprised of dry forest, is home to two lakes and a creek and elevations from 45-70 meters.

**Management**

**Structure**

The Sanctuary has a total of 10 permanent staff including a Park Warden; 4 Rangers; 2 Foresters; and, 3 administrative staff.

**Objectives**

The main objectives of the Sanctuary are to conserve the dry forest ecosystem of central Myanmar; undertake ecosystems research, preserve the cultural heritage of the site and, develop ecotourism and provide visitor education.

**Tourism Activity**

**Visitor Numbers**

The Sanctuary attracts about 60,000 visitors per year, ranging from 2,000 per month in the low season to 10,000 per month in the high season. Peak visitation months are November to February, with monthly arrivals varying from 7,000-10,500 visitors. May to September for the low-season with visitors numbering 2,000-3,000.

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**Attractions**

Tourism assets include the Sanctuary's wildlife enclosures and breeding facilities. Bird-watching during migratory seasons is also possible. While the Lawkananda Pagoda festival (with local foods and handicrafts) is convened every July, it is during the rainy season and is not yet considered an attractive event for foreigners.
Facilities

A restaurant popular with package and FIT tourists is located in the Sanctuary. There are also picnic huts, tables and bird-watching towers. The Sanctuary has a visitor interpretation centre and features a very nice tortoise-breeding centre (Star Tortoise, Roofed Turtle) and animal enclosures for Golden Deer. Cranes and Peacocks roam freely within the Sanctuary.

Tourism Revenue Generation

The Sanctuary charges entry fees of 200 kyats for domestic visitors (100 kyats for children); and 1,000 kyats for international visitors. Parking fees are 200 kyats per car, and 100 kyats per motorcycle. The restaurant is leased to the highest bidder on a 3-year contractual basis via a tender process, and is currently leased for 150,000 kyats per month. In addition to the annual concession fee, a portion of the monthly operating revenue is also collected along with entry and parking fees. Total tourism-related income for 2013-14 was 12,300,000 kyats.

Park Management

Structure

The Sanctuary has a total of 10 permanent staff, including a Park Warden; 4 Rangers; 2 Foresters; and 3 administrative staff.

Objectives

The overall management objectives of the Sanctuary are to conserve the dry forest ecosystem of central Myanmar; undertake ecosystems research; preserve the cultural heritage of the site; and, develop ecotourism and provide visitor education.

Ecology and Conservation Status

Ecology

The Sanctuary is a dry forest ecosystem with teak and iron wood species. Notable biodiversity include: 50 species of birds, including the Sirus Crane, Peacock and Parrots; various mammals, including the Golden, Sambur, hog & barking deer, small cats, squirrels; a number of snakes, iguana and monitor lizard. The Sanctuary has a partnership with the Wildlife Conservation Society (WCS) to save the Star Tortoise and Roofed Turtle. Other species are also raised for released into the wild including green peafowl, cranes, yellow tortoise and small cats. Golden deer, Star tortoise and Roofed turtle are raised in enclosures.

Conservation issues:

Priorities of annual conservation plans include: patrolling; a “greening and cleaning” program; protection work on Star Tortoise, Roofed Turtles and Golden Deer; research and observation of migratory birds in winter season; forest fire protection; flood protection; and, staff capacity building.

Local Livelihood Status

Two villages with a total of 2,100 households neighbor the Sanctuary. All of these households subsist through farming, animal husbandry, hunting and casual labor, including tourism-related work. While encroachment into the Sanctuary is not a major concern due to the Sanctuary’s small size, there are some minor issues related to illegal fishing, grazing, collection of fuel-wood.
Engagement in Conservation

A rotating education and awareness programmes is on-going and is implemented in 3 villages per year.

Culture

Some small pagodas and shrines are located in the Sanctuary. No additional information available.

Ecotourism Role, Opportunities and Challenges

Current Role

Tourism in the Sanctuary is well managed at this point. Waste from the restaurant is collected in septic tanks and there is little littering. Community awareness raising initiatives are effective along with management arrangement for the restaurant. There is no tourism or visitor management plan for the PA and the Warden is currently satisfied with how tourism is functioning within the Sanctuary.

Opportunities

The Sanctuary offers an opportunity to relax in a cool and quiet natural setting and a nice break for tourist visiting the main offerings of offering of temples and shrines. The strong visitor numbers and excellent wildlife interpretation activities provides an important opportunity to raise awareness on conservation and sustainability issues to a wide range of visitors. Conducting supply chain research could identify opportunities to increase local benefits.

Challenges

Tourism is well managed and no concerns are evident at this point. Any increase in tourism activity in the Sanctuary should be carefully monitored and linked to sustainable revenue generation that could further support the conservation and education values of the site.
Meinmahla Kyun Wildlife Sanctuary

Introduction:

Meinmahla Kyun Wildlife Sanctuary is located in Bogalay Township in the Ayeyawaddy Region, approximately 160 kms (3.5 hours) south-west of Yangon. The Sanctuary is fringed by the Bogalay River in the east and by the Kadonkani River in the west. A network of smaller rivers within the Sanctuary are accessible depending on the tides.

Tourism Activity

Visitor Numbers

Visitor arrivals have fluctuated over the last four years with total arrivals peaking at 59 in 2012. In 2013 the number was 31 and this increased to more than 50 for 2014. International visitors have out-numbered domestic visitors in each of the last four years.

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Attractions

The Sanctuary’s main attraction is the high-quality delta ecosystem that supports abundant mangroves, plentiful birdlife, and most notably the Irrawaddy Dolphin and the estuarine Crocodile. The local livelihoods and cultures present additional features.

Facilities

Three guesthouses have been built by the Forest Resource Environment Development and Conservation Association (FREDA). The largest and most frequently used is the 10-bed guesthouse on Byone Island and the banks of the Kadonkani River. Given the limited tourism infrastructure some visitors have stayed at the Sanctuary’s guard post and in cyclone shelters set up in Taung Chaung, Htaw Paing and Kyaung Htauk camps. Local boat services are available to reach the Sanctuary and surrounding islands and villages, but there are very few landing places along the river networks.

Tourism Revenue Generation

No revenue is generated by the Sanctuary. Fees charged for boats, accommodation, food and local guides covers actual costs and maintenance.

Fast Facts

- Date of establishment: Designated a Wildlife Sanctuary in 1994, and declared an ASEAN Heritage Park in 2003
- Area of PA: 137 km² with elevations from 0 to 30 meters
- Number of staff: 18
- Visitor numbers: 50, 2014
- Visitor facilities: Guesthouses with meals available
Management

Structure
The Sanctuary has a total of 18 staff including a Park warden, Senior ranger, 5 rangers, foresters, UD, LD, auditor, drivers and guards. The Sanctuary office is located in Bogale town while there are also 5 permanent guard camps and 2 temporary guard camps in the Sanctuary. The Meinmahla Kyun administration system includes the township administrator, village group administrators, and the heads of 10 local households.

Management Objectives
The overall management objective of the Sanctuary is to protect and conserve the mangrove ecosystem; preserve remnant mangrove forests as seed production areas; conserve and manage the areas as breeding grounds for fish and prawn; implement conservation programmes for endangered estuarine crocodiles; establish a bird sanctuary for protection of resident and migratory water birds and shore birds and their habitats; upgrade and promote ecotourism with attraction on mangrove conservation activities, research activities on estuarine crocodiles and bird watching; and, establish an environmental education centre.

There is no tourism or visitor management plan for the PA. A Township Tourism Development Committee has been formed that includes the Township Administrator as Chair and the Sanctuary Warden as Secretary. Other officers, town and civil society representatives are included as members.

Ecology and Conservation Status

Ecology
In addition to stunning mangrove estuaries, the Sanctuary is an important home for critically endangered species such as the Irrawaddy Dolphin, the Estuarine Crocodile, the Common Otter, Fishing Macaque, as well as numerous species of migratory birds.

Conservation issues
The Sanctuary is the only site in Myanmar where the Estuarine Crocodile is protected. Two crocodile conservation camps are located on the West side of the island. A turtle nesting site is located around 16km. from the Sanctuary. Risks to the Sanctuary’s ecosystems include fishing & harvesting of aquatic resources which sometimes includes the use of poisons, logging and harvesting for charcoal and firewood, and the gathering plants (collection of ferns, tha bot and nipa palm).

Local Livelihood Status
There are 25 villages with some 5,362 households and a total population of 22,377 people located around the Sanctuary. These communities rely on the Sanctuary’s resources for subsistence and commercial purposes. Many harvest forest products such as poles of mangrove trees, marsh date-palm, and firewood for subsistence and micro-business purposes. Illegal harvesting is on-going activity undertaken by poor locals and migrants, some working for charcoal traders supplying urban areas. In-migration and out-migration is common as local youth often seek temporary employment in urban areas and semi-nomadic fisherman visit for short periods.
**Engagement in Conservation**

Local awareness raising activities related to conservation are conducted regularly while low budgets and limited staff hinders wider efforts to inform and protect.

**Culture**

Mein-ma-hla means beautiful woman in Burmese, and the island is linked to a local myth.

**Ecotourism Role, Opportunities and Challenges**

**Current Role**

Most of the visitors to the Sanctuary are international and fall into 2 categories. Initially most visitors came for scientific research purposes. An increasing majority of visitors are now coming for wildlife viewing and adventure tourism purposes. The Sanctuary has received recognition in several popular travel guides and several Yangon-based tour companies are promoting trips. While many travellers enquire about the trip the relatively high transportation cost is a deterrent to many. Though the potential exists, there is little engagement of local communities in the tourism product and activities at this point.

**Opportunities**

- Better, more effective market linkages that bring the cost of visiting the Sanctuary to a level where more of the market can afford will certainly increase visitor numbers.
- Product development should include integrating local livelihood features to the tourism product that would also enhance the tourism product and increase local earning opportunities through tourism.
- More interpretation material and use of local guides will add value to the tourism experience and create more local income earning opportunities.

**Challenges:**

The relatively high transport costs associated with this product deter many potential visitors.
Moeyungyi Wetland Wildlife Sanctuary

**Introduction**

Moeyungi Wetland Wildlife Sanctuary is located in Bago and Waw Townships of the Bago Region. This area consists of a low, flat plain, which is part of lower the Sittaung Valley and the southern continuation of the Daik-U-Pyuntansar plain. The topography is characterized by deep-water and fields fed by creeks that drain into the wetland. The Sacturay is located near the Yangon-Mandalay Highway, approximately 100km., or a 2-hour drive, north of Yangon.

**Tourism Activity**

**Visitor Numbers**

Visitor arrivals have fluctuated over the last six years with total arrivals peaking at 7,334 visitors in 2012-13. Domestic visitors outnumber international visitors approximately 2 to 1. Most international visitors come through organized tours between November and April when the migratory bird species can only be seen.

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<th>2014</th>
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<tr>
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<td>7,212</td>
<td>7,031</td>
<td>10,000 (est)</td>
</tr>
<tr>
<td>International</td>
<td>149</td>
<td>303</td>
<td>333 (est)</td>
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**Attractions**

The main attraction of the Sanctuary is the wide variety of water-birds that can be spotted. The quality of this resources is acknowledged by its status as a Ramsar Site. The nice restaurant and Wetland Education Centre also attracts visitors.

**Facilities**

Accommodation is available in “boat-house” styled bungalows. The site has a nice restaurant and a recently upgraded Wetland Education Center. There is also a bird watching tower that is accessible only by boat. Binoculars and telescopes are available.

**Tourism Revenue Generation**

The entry fee for domestic visitors is 100 kyats, and 2,000 kyats for international visitors. Boat hire is available with rates for international visitors of $15 per person for two hours, and 15,000 kyats per boat for 45 minutes for domestic visitors.

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**Fast Facts**

- Date established: established in 1878, and was declared a Wildlife Sanctuary in 1988.
- Status: Wildlife Sanctuary and Ramsar site (2005)
- Size of PA: 104km2
- Number of staff: 13
- Visitor numbers: 10,000 domestic and 333 international (est for 2014)
- Visitor facilities: Accommodations, restaurants, interpretation centre, picnicning area, and watch tower.
This revenue is collected by the Forest Department. Accommodation and restaurant services are provided through a service contract with a private investor.

Management

Structure
The Sanctuary has a total of 13 staff including a warden, 7 office, and 6 field staff. The Warden’s office is located in Pyin Bon Gyi village, and there are three ranger posts in the villages of Kapin, Pyun Chaung and Pauk Taw.

Objectives
The Sanctuary’s main management objectives are to implement effective conservation management systems for the wetlands; upgrade the Wetland Management Unit; and, strengthen law enforcement in order to insure the sustainable conservation of the wetland.

There is no ecotourism or visitor management plan for the PA.

Ecology and Conservation Status

Ecology
The Sanctuary has several forms of wetland habitats with high ecological value that support a wide range of resident and migratory water-bird species. There is a total population of 18,364 birds, from 133 species including more than 20 aquatic species. There are also 12 mammal species, 6 frog species, one turtle species, 8 lizard species, 9 snake species, 41 butterfly species, 37 fish species. The Sanctuary also hosts species 74 of plants.

Conservation Issues
Risks to the Sanctuary’s ecosystems include: bird hunting and trapping with nets; electric-shock fishing; trading of turtles and snakes; and, land encroachment for paddy fields.

Local Livelihood Status
The Sanctuary is surrounded by 17 villages comprising 13,163 households. Most of the Most of the area’s population of 38,928 depend on subsistence agriculture (paddy-farming), fishing, casual labour, animal husbandry including duck rearing, and retail activities for their livelihoods. An increase in conflicts with local communities has been recorded with more households encroaching into the Sanctuary for paddy-farming, fishing, duck raising and cattle grazing.

Engagement in Conservation
Sanctuary staff liaise with township and village heads to help raise awareness and further engage local communities in conservation issues.
Culture
Most of the villages are Bamar Buddhists that have pagodas, Buddha images, Simas, monasteries and religious halls. The cult of “Namkarine” is a tradition that has been handed down from the Hantharwady Era and is common among local people and is represented by shrine of “Nat” for “Nankarine”.

Ecotourism Role, Opportunities and Challenges

Current Role
Although the numbers of visitors has increased to over 7,000 in the last 12 months, most stay only a short time and apart from the restaurant spend very little. Hence there is a minimal tourism economy with few supply chains developed.

Opportunities
As one of Myanmar’s only Ramsar sites, the Sanctuary presents an important birding area that is easily accessible from Yangon. Improved visitor services and marketing could draw in greater visitor numbers. Although limited in scale, tourism activities to date have generated positive benefits.

Challenges
Challenges include potential conflicts among stakeholders and local communities; unintended disturbance to wildlife and ecosystem; population growth, encroachment and over-harvesting.

Ways Forward:
• Product development and diversification (such as improved accommodation with well-planned additional activities such as kayaks or bike rentals) would attract more visitors and increasing spending, revenue generation, and income earning opportunities for local people.
• Improve market linkages such as the potential of providing a lunch stop for tours going to/from Kyaikhtiyo. The site is only 20 minutes from the main road and provides a more interesting option than the standard lunch stations along the main highway. A tour operator interested in this option mentioned that including a $1/person visitor fee would be acceptable and this could generate significant resource for the PA to improve interpretation materials or fund other conservation programs.
• Alternative income & employment generation opportunities need to be explored through researching possible supply chains and ways to better engage more local people in the tourism economy (especially linked to the domestic market).
MYANMAR Ecotourism Policy & Management Strategy 2015 - 2025
Myaing Hay Wun Elephant Camp

Introduction

Myaing Hay Wun Elephant Camp is located in Taikkyi Township of Yangon Region, about a 120 kilometres, two hour drive, north-west of Yangon.

Tourism Activity

Visitor Numbers

There have been no domestic or international visitors since 2010.

Attractions

The Camp has 22 elephants, one senior mahout and 22 regular mahouts. Visitors can ride the elephants through the forests and watch them bathing in a nearby river.

Facilities

The camp has a reception area, five bungalows, a mahouts’ school house, and a medical centre for the elephants. Investment is needed to improve the conditions of all buildings.

Tourism Revenue Generation

The Camp has a two-tier pricing structure. Elephant riding fees are $20 for international guests and 3,000 kyats for domestic visitors.

Park Management

Structure

The Camp is owned by MOECIF’s Myanmar Timber Enterprise company and managed by MTE’s regional office in Tharawaddy. The Camp has a manger, assistant manager, a timber ranger and mahouts.

Objectives

The overall objectives of the Park include supporting forest conservation, education and recreation.
Ecology and Conservation Status

Ecology

The Camp occupies a relatively small area and is surrounded by mango, teak and hard wood plantations as well as land used for agriculture including rice cultivation and sugar plantations. Notable mammals include Wild cats, Gaur, Banteng, Barking deer and Wild boar. Birds include, Green Peafowl, Ruddy Sheld Duck, Hill Myna, Blossom-headed Parakeet, Pheasant and, Red Jungle Fowl.

Conservation Issues

There are no significant conservation issues at this time.

Local Livelihood Status

Surrounding communities engaged in farming activities including shifting agriculture and animal husbandry. Additional activities include collecting firewood, burning charcoal and bamboo extraction.

Culture

Not applicable to this site

Ecotourism Role, Opportunities and Challenges

Current Role

To date tourism has played a very minor role in the Camp’s development or operations. The Camp is a small-scale operation that currently offers limited opportunities for surrounding communities to engage in the tourism economy.

Opportunities

Diversifying the product offering with an aim to develop more responsible tourism products that also provide increased opportunities for local income and employment generation.

Challenges

• Over-reliance upon a singular and out-dated product offering. The current product is focused upon nature-based entertainment tourism, rather than genuine ecotourism. There are few if any links to biodiversity conservation and protected area management and local community development.
• Poor road condition of last 12 miles to the Camp, Poor condition of rooms and reception, Able to accommodate less than 20 visitors overnight
• Lack of reliable water supply

Ways Forward

Engage private sector for ideas and cooperation on product development and marketing.
Natmataung National Park

Introduction

Natmataung National Park is located in Matupi, Mindat and Kanpetlet Townships of Chin State, around 160 kilometers west of Bagan. The Park has an area of 712 km² with elevations from 740 to 3,200 meters. The Park is part of the Rakhine and Greater Himalayan mountain ranges and home to the country’s second highest mountain range. The Park contains two major and several smaller rivers upon which 3 million people are dependent. Extensive forest cover is made up of Hill Ever Green Forest, Pine Forest, and Hill Savanah. The mountainous terrain makes communication difficult and the area is subject to landslides.

Access is typically via Bagan and the Nyaung U airport. The distance from Bagan to Kanpetlet is around 160km, the drive takes around 4-5 hours and roads are in poor condition. The Road between Mindat and Kanpetlet is in relatively good condition as is the road from Kanpetlet to the Park. The road into the Park is unpaved and largely inaccessible in the monsoon season. The Chin State government has plans to expand and improve some roads within the Park.

Tourism Activity

Visitor Numbers

International visitor numbers have increased from 180 in 2011 to 426 in 2013, while domestic visitors have increased from 94 to 734 over the same period. October to March are the busiest months, with few if any visitors from May to August.

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<th>2012</th>
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<td>494</td>
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</tr>
<tr>
<td>International</td>
<td>372</td>
<td>426</td>
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Attraction

Natmataung is an ASEAN Heritage Park and home to Mt Victoria, the highest peak in the Rakhine mountain range. In good weather expansive and spectacular views across surrounding plains can be enjoyed from the mountain’s viewpoints. The Park is also an important birding area and is the only place to see the White-browed Nut-hatch and one of the few places to see Blyth tragonpan. Rare lizards are also endemic to the region and the Parks is described by IUCN as a site of exceptional plant diversity.

Facilities

The town of Kanpetlet has 3 hotels and Mindat also has a few local guesthouses. Basic restaurants are available in both locations.
Tourism Revenue Generation

No entrance fees are charged to visitors and the Park has no current means for generating revenue.

Park Management

Structure

35 staff positions have been identified for the Park and 20 have been appointed. Vacant posts are mainly among lower ranks and include sub-foresters, guards, drivers and workers. The Warden’s office is located in Kanpetlet while a sub-office has been proposed for Mindat. Two guard posts have been established and two additional posts have been proposed.

The Park is divided into 4 zones to manage patrolling and conservation activities. A separate zoning system is also used to describe different types of land-use, namely a Recreation Zone around the peak of Mt Victoria; a Research Zone below the peak; an Indigenous Rights Zone restricted to use by villages that reside within the Park; and, a Buffer Zone for sustainable forest use by local communities.

Park management priorities include: undertaking endangered and residential species research; raising local awareness of biodiversity issues; enforcing Park laws, rules and regulations (patrolling); addressing climate change issues; implementing the Park’s zoning management system; implementing conservation activities in partnership with local, national and international partners; and, enhancing the income opportunities of local communities.

Objectives

Park management objectives include: conserving the fragile mountain ecosystems and biodiversity; conserving the watershed area; providing development opportunities for local communities; and, promoting ecotourism.

Ecology and Conservation Status

Ecology

Forest cover is made up of hill forest and comprises dipterocarp forest, pine forest, laurel and stone oak forest, oak forests, oak and rhododendron forests and meadows. Notable features include: 808 species of plants, including 70 ferns and a rich variety of wild orchid species, including endangered medicinal orchids, occurs at altitudes between 1,000 and 2,000 m, 34 mammals, including Civets, Barking Deer, Spotted Liasang, Asiatic Black Bear, Asian Golden Cat and Yellow Throated Marten, 345 birds, including Burmese Tip, Mount Victoria Barbax,, 105 reptile and amphibians, and 77 butterflies.

Conservation Issues

A road extension has recently been cut to the top of Mt. Victoria with plans to allow vehicle access from three sides. A lack of consultation and EIA procedures for road construction were partly responsible for UNESCO’s refusal to include the Park on a short list for World Heritage nomination. Encroachment by local communities for agriculture, NTFP harvesting and hunting are also on-going threats.

Local Livelihood Status

Three villages are located inside in the Park while 55 others are located around the Park. Total population is around 1,426 households and a population of 8,427 people. Broken down by township, Kanpetlet has 35 villages with 704 households and
a population of 4,210. While Mindat has 20 villages, 722 households and a population of 4,217. No details are available for
Matupi township on the western side of the Park. Most villages have an agricultural economy with a high dependence upon
shifting agriculture, plantation farming and animal husbandry. All utilise the Park's resources in various ways, some of which
are illegal according to Park rules such as swidden agriculture practice, harvesting of firewood and NTFP's, and hunting for
both subsistence and commercial purposes.

**Engagement in Conservation**

Agro-forestry programmes are being introduced to reduce household dependence upon the Park's resources. An indigenous
rights zone and Park buffer zone have been established and are used to deliver agro-forestry training, which has been
organized with support from a Forestry Department, JICA and Korean funded project covering 65 acres in four model
villages, focused upon tea, coffee and wa-o. Conservation education activities have also been undertaken in target schools
and villages, and also for key government officials.

**Culture**

Local residents are primarily from the Chin ethnic groups and have their own distinctive culture, customs and traditions
including distinctive dialects, beliefs and customs, including tattoos on the faces of many Chin women.

**Ecotourism Role, Opportunities and Challenges**

**Current Role**

Tourism has played a moderate role in the Park to date. Due to the challenging access and local logistics most international
visitors arrive in groups organized from Yangon. Seasonality is a major issue for the Park as monsoon weather obscures
landscape view from April/May to September. The best time to visit is from November to January. In 2013 more than 60%
of visitors arrived in the month of December.

**Opportunities**

While Natmataung's cultural and trekking tours can be compared with similar products in Shan state Mt Victoria offers
unrivalled scenic views and is renowned for its bird watching. However, poor accessibility and availability of quality
accommodation restrict the destination's appeal.

If properly organized excursions could embrace different festivals and ceremonies within accessible villages. Understanding
and interpreting local customs and ethnic practices such as the tattooing of women's faces could form part of such a
product.

A high incidence of poverty suggests local communities will seek out tourism-related employment opportunities. Low visitor
arrivals and a widespread lack of sector knowledge and experience combine to constrain market activity. Employment
opportunities are available in local restaurants and guesthouses aimed at local business travellers, and more recently with
facilities targeted towards the domestic and international recreation markets – some of which are poor standard. Kanpetlet
and Mindat are small business / trading centres, and there appears to be limited capacity for local investment in tourism-
related businesses beyond basic retail, restaurant and handicraft opportunities.

**Challenges**

Challenges include: poor accessibility to the destination; high seasonality; low visitor numbers; low standard of
accommodation & restaurants; lack of local guides; lack of industry-related knowledge and skills at the destination level.
Ways Forward

Trekking tours through villages would need to be organized in a sensitive manner with inputs by experienced product development specialists. More product development activity and research is required to understand the potential of village tours. Over exposure, exploitation and a lack of sensitivity towards tattoo women could become management issues.
Panlaung-Pyadalin Cave Wildlife Sanctuary

**Fast Facts**
- Date established: Gazetted in 2002
- Status: Wildlife Sanctuary
- Area of PA: 334km² with elevations from 150-1,555m.
- Number of staff: 21
- Visitor numbers: 103 in 2014
- Visitor facilities: None in the Sanctuary, but available in nearby villages.

**Introduction:**
The Sanctuary is located round 90km. South-east of Mandalay, in Ywangan Township, Danu Self-Administered Zone. The Sanctuary and caves are readily accessible from Mandalay, about 2.5 hours by car. In X 9 villages were relocated to accommodate the reservoir created by Kingda dam. Although now practicing farming lifestyles, many households continue to depend upon forest resources.

**Tourism Activity**

**Visitor Numbers**
In 2013 there were 6 International visitors. In 2014 (till Aug.) 94 Domestic, and 9 Internationals had visited the site.

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<tbody>
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<td>6</td>
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**Attractions**
The main visitor attractions are two limestone caves located in the forest reserve. Pyadalin Cave features several well-preserved hieroglyphics that are over 11,000 years old, indicating human habitation during the Mesolithic and Neolithic periods. Nearby, Panlaung cave features four main chambers, each with open ceilings and several smaller interesting shrines and offering opportunities for exploring. The caves are accessible by a 45-minute boat trip across Kingda Reservoir, followed by a 1.5 hour walk through healthy, secondary forest.

**Facilities**
While there is limited tourist infrastructure in the Sanctuary, Ywangan town has one hotel, two guesthouses and two hostels, and Kintar village has one lodging house. Pindaya has five hotels catering to international tourists.

**Tourism Revenue Generation**
No entry or user fees in place. The Sanctuary does not generate any revenue.
Park Management

Structure
The Sanctuary is managed by a warden, 4 administrators, 5 rangers, 6 forest guards and 2 temporary staff. Staff are divided between the head office in the north and the ranger posts in the south.

Objectives
The main management objectives of the Sanctuary are to preserve the archaeological site of Pyadalin caves; conserve the surrounding ecosystems, flora and fauna; and, conserve the watershed of the Kingda reservoir.

Ecology and Conservation Status

Ecology
The Sanctuary is composed of moist and dry upper mixed deciduous forests and regular deciduous forest. Notable biodiversity includes: 337 species of flora, including 148 plants, 72 herbal plants, and 117 orchids. Endangered flora includes Tapintinemyanan, Tapinshwehti and Thitmwe. The 265 species of fauna include: 35 mammals, 140 birds, 17 water birds, 46 reptiles and 27. Endangered fauna includes the Green Peacock, Water Lizard and the Burmese Silver Pheasant

Conservation Issues
Local villages are heavily dependent on the sanctuary’s natural reserves. Common activities include encroachment for shifting cultivation practices and animal grazing, gathering NTFPs and the illegal harvesting of timber for commercial purposes.

Local Livelihood Status
There are 20 villages located around the Sanctuary (including 9 relocated villages) with a total population of approximately 12,500. The villages to the East are Danu ethnic groups, while villages to the West are Bamar. Danu villages engage in shifting cultivation, harvesting NTFPs, and hunting for subsistence and commercial purposes. Bamar households are subsistence farmers who also benefit from casual labour opportunities together with logging, firewood and charcoal production, bamboo harvesting and mining.

Culture
Cave paintings and other cultural relics in the caves. No other information currently available.
Ecotourism Role, Opportunities and Challenges

Current Role

To date there has been very little tourism activity. There is no tourism or visitor management plan for the PA.

Opportunities

While the hieroglyphics are a special feature, the area's scenic beauty and rich biodiversity an additional tourism asset. The site appears to be well-positioned for a 1-2 day excursion from Mandalay, which could provide a revenue source for conservation efforts and, if linked to local products and services, an alternative income sources to reduce dependency on the sanctuary's natural resources.

Challenges

There is a lack of local capacity to plan, develop and host tourists, and a parallel need to attract tour companies willing to package and promote a tourism product.

Getting access permission from various government agencies is required and this could create problems or excessive procedures for visitors and tour operators.

Ways Forward:

- Product Development/Diversification: A visit to the caves can be readily packaged into a marketable 1-day excursion from Mandalay. An overnight ’backpacker’ soft-adventure package might also be developed with some training and investment in local accommodation, restaurants and transport providers.
- Market Linkages: There is a need to engage local tour operators from the outset to help ensure that any products are market ready and sustainable.
- Local Capacity Building:
- Skills training for Sanctuary staff, local residents, and local authorities will support both visitor experience and local income earning opportunities.
Phokyar Elephant Camp

Introduction

The Phokyar Elephant Camp is located in Yedashi Township of Bago Region, 346km North of Yangon (about a 7 hours drive), and 113km south of Nay Pyi Taw. The Camp is situated on a foothill surrounded by a small river with moist deciduous forests and a teak plantation.

Tourism Activity

Visitor Numbers

Visitor numbers to the camp have been steadily increasing over each of the last nine years, with total arrivals growing from 280 visitors in 2005-6, to 1,021 visitors in 2013-14. The camp is most popular with domestic visitors, which have increased year on year, while international visitors peaked at 416 in 2011-12.

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<tbody>
<tr>
<td>Domestic</td>
<td>519</td>
<td>666</td>
<td>682</td>
</tr>
<tr>
<td>International</td>
<td>416</td>
<td>331</td>
<td>339</td>
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Attractions

The Camp has six elephants trained to entertain visitors with various performances. Visitors can also experience the forest surroundings while riding on the elephants and learn how the elephants are harnessed for transportation and extraction work, and how they are bathed and taken care of.

Facilities

The camp has a meeting hall with attached dining room, and seven lodges each with two bedrooms and equipped with air-conditioning run by the Camp’s generator.

Tourism Revenue Generation:

The Camp has a two-tier pricing structure for domestic and international visitors. A double room is $65 for international guests and 30,000 kyats for locals. Admission fees are $10 for international and 2,000 kyats for domestic visitors. Elephant riding fees are $60 for international guests and 12,000 kyats for domestic visitors. There is insufficient visitor volumes to sustain the Camp’s viability.
Park Management

Structure
The Camp is owned by MOECAF’s Myanmar Timber Enterprise Company that has leased operations to the Asia Green company since 2005.

Objectives
The Camps’ main management objectives are to support forest conservation, education and recreation activities.

Ecology and Conservation Status

Ecology
The Camp is not in an area of biodiversity significance. Its 15 acres contain 188 teak trees, reportedly planted in 1898.

Conservation Issues
Expansion of teak plantations are creating scarce grazing land for the elephants. The wider Saingya Reserve Forest has been progressively eroded and is subject to growing human encroachment and settlement.

Local Livelihood Status
Surrounding communities are engaged in farming activities including shifting agriculture and animal husbandry. Additional activities include collecting firewood, burning charcoal and bamboo extraction.

Culture
No sites of cultural interest located nearby, no local festivals of tourist interest.

Ecotourism Role, Opportunities and Challenges

Current Role
The high season is from November to March with August to October forming the low season and April to July are shoulder season. The Camp is able to offer a reliable product 12 months a year. However it appears that there are insufficient visitor volume to sustain the Camp’s viability.

Opportunities
The Park’s strongest assets are its location and accessibility from Yangon and Nay Pyi Taw and the availability of elephants. Developing ecotourism products that match these opportunities would need to carefully consider market demands. Both domestic and international markets are drawn to elephant products, but can have different expectations of what elephant tourism might involve.
Challenges

The current product is focused on "elephant entertainment". This form of tourism attraction is quickly declining in popularity and many European tour companies will not include such products in their tours. The Camp is a fairly small-scale operation that offers limited opportunities for surrounding communities to engage in the tourism economy.

Ways Forward

In order to become a successful tourism site in the future the Park will need to upgrade and diversify its tourism offerings. There are plans to expand the forest area and elephant grazing lands and to diversify the product offering developing more substantive attractions and services and increase opportunities for local income and employment generation. These efforts should involve consultations with the tourism business sector to ensure market viability and to raise awareness.
Shwesettaw Wildlife Sanctuary

Introduction

The Shwesettaw Wildlife Sanctuary is located in Minbu, Pwintphyu and Ngape Townships of the Magway Region, approximately 250km South of Nyaung-U (Bagan) and 42km West of Minbu town.

The Sanctuary has an area of 553km2 with elevations from 55-555 meters, and boundaries marked by the Mone and Mann rivers. The Sanctuary contains Dry-Upper and Moist-Upper mixed deciduous forests, which cover 80% and 20% of the Sanctuary respectively. The Sanctuary is easily accessible by road, and tourist access around the park is possible via car, motorcycle and on foot.

Tourism Activity

Visitor Numbers

Around 250,000-350,000 pilgrims attend the annual Pagoda festival over a period of 73 days. Numbers average around 5,000 pilgrims per day or 150,000 per month. There are very few visitors at other times. Peak season is February to March – related to the pagoda festival attract many local visitors but very few foreigner tourists.

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<th></th>
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<td>Domestic</td>
<td>300,000 approx</td>
<td>300,000 approx</td>
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<tr>
<td>International</td>
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Attractions

The festivals of the Shwesettaw Pagoda in February and the Kyaingtaung Pagoda in November draw the most visitors to the Sanctuary. The Sanctuary’s ex-situ conservation offers some tourism potential, along with opportunities view Eld’s and Golden Deer.

Facilities

The Sanctuary has its own guesthouse that can accommodate 12 people. During the festival period government and private guesthouses are made available for pilgrims. There are approximately 900 shops and 40 restaurants that are operated by local people during the festival times.
Tourism Revenue Generation

The Sanctuary charges a $5 dollar entry fee to international visitors while there is no fee for domestic visitors or other user fees. Fees for accommodation and meals and transportation provided cover actual cost and do not generate any revenue for the Sanctuary. There is a significant visitor economy generated during the pilgrimages and festival activities. The Sanctuary however does not receive any benefit from this.

Management

Structure

The Sanctuary is divided into four management zones, namely: Zone 1 the Kyauk oh Gyi Reserve Forest and Kywe Tagar Reserve Forest; Zone 2 comprises the Shwesattaw Reserve Forest and Myo Sapho Reserve Forest; Zone 3, the Kyee Kan Reserve Forest; and, Zone 4, the Bufferzone. The Sanctuary is staffed by a Warden, two Range Officers and a total of 45 permanent staff, which are divided between patrolling and education (24), animal conservation (6), finance (3), administration (8) and mechanics (4). The Sanctuary’s office also oversees the management of Wetthikan Wildlife Sanctuary. There is no tourism or visitor management plan for the Sanctuary.

Objectives

Sanctuary’s management priorities are to: undertake endangered and residential species research; raise local awareness of biodiversity issues; enforce Sanctuary laws, rules and regulations (patrolling); address climate change issues; implement the Sanctuary’s zoning management system; implement conservation activities in partnership with local, national and international partners; and, enhance the income opportunities of local communities.

Ecology and Conservation Status

Ecology

Dry upper and moist upper mixed deciduous forests cover 80% and 20% of the Sanctuary respectively. Flora includes 89 tree species; 22 species of herbs, and 3 orchid species. The Sanctuary is also home to 14 species of mammal; 43 species of amphibians, 39 species of butterfly and 113 species of birds. The site is home to the critically endangered Burmese Star Tortoise which is endemic to Myanmar. Other globally threatened species in the Sanctuary include the endangered Dhole and the Sunda Pangolin.

Conservation Issues

The Sanctuary’s main conservation efforts focus on protecting the Eld’s deer and Star Tortoise populations and the natural ecosystems habitat upon which they are dependent. Ex-situ conservation efforts focusing on the Star Tortoise started in 1999.

Encroachment by local communities for agriculture, bamboo & NTFP harvesting and hunting are also on-going threats.

Local Livelihood Status

There are 39 villages located around the Sanctuary and approximately 18 villages located inside the Sanctuary. All households around the Sanctuary are subsistence households that depend upon farming, shifting agriculture, animal
husbandry, fishing, hunting and casual labour. Encroachment issues into the Sanctuary are an ongoing problem, especially with regard to agricultural extension, bamboo and fuel-wood collection. Thread production from lotus plants is also a significant local cottage industry. Other local products include traditional cloths, dehydrated bamboo shoot, mushroom and other vegetables. These are sold during the festival time and provide important incomes that supplement their subsistence agricultural livelihoods.

**Engagement in Conservation**

Education and awareness activities are conducted throughout the year, and reach two to three villages each month.

**Culture**

The Sanctuary is home to Shwesetta Golden Buddha Foot-print Pagoda in Minbu Township, which is one of Myanmar’s most famous shrines. Other temples include Kyaingtaung Pagoda in Pwintbyu Township, Kotekathan Pagoda in Pwintbyu Township. Local residents are mainly of the Bamar and Chin ethnic groups, most are Buddhists.

**Ecotourism Role, Opportunities and Challenges**

**Current Role**

The Shwesetta Golden Buddha Foot-print Pagoda draws a very substantial number of domestic and regional visitors who arrive in concentrated numbers during the festival season. This flow of visitors provides important local income earning opportunities but also puts heavy strains on the Sanctuary’s natural resources. There are very few international visitors, and most of these are usually on scientific research mission.

**Opportunities**

- The 250,000+ domestic and regional visitors present significant opportunities to:
- support local economic development through supply chains, and
- raise awareness on conservation and sustainability.
- The site’s strongest ecotourism development assets are the natural beauty and important wildlife. Developing tourism products based on wildlife viewing and soft, nature tourism, such as trekking.
- A high incidence of poverty suggests local communities will seek out tourism-related employment opportunities.

**Challenges**

- Key factors constraining ecotourism development include the time consuming and expensive access and lack of readily available tourism products. Other limiting factors that would need to be addressed include the current lack of industry-related knowledge and skills at the destination level and a lack of electricity.
- Greater cooperation is needed address the significant impacts and opportunities presented by the heavy visitor activities during the festival period. All stakeholders need to be involved in developing a visitor management strategy and site operation regulations that conserves local resources while generating local economic benefits. How this can be achieved presents an important challenge.
Thamihla Kyun Wildlife Sanctuary

**Introduction**

NThamihla Kyun Wildlife Sanctuary is located in Ngaputaw Township of Ayeyawaddy Region at the mouth of the Ayayawaddy River, 7 nautical miles from Higyikyun, the nearest land point. The Sanctuary is a small uninhabited island with an area of 0.88 km². The Sanctuary is generally difficult to access. Routes to the Scanturay include: Yangon-Pathein, 193km (4hrs); Pathein-Ngaputaw, 33km (2hrs); Ngaputaw- Higyikyun, 40 nautical miles; Higyikyun- Thamihla Kyun, and 7 nautical miles.

**Tourism Activity**

**Visitor Numbers**

The Sanctuary receives very few if any visitors. No accurate data is available.

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**Attraction**

Turtles and their nesting sites are the most important tourism assets.

**Facilities**

None

**Tourism Revenue Generation**

No entry or user fees in place.

**Park Management**

**Structure**

The Sanctuary has a total of 2 fishery staff engaged in patrolling activities. The most important provisions for conserving turtle habitat comes under of the Fisheries Act. There is no tourism or visitor management plan for the PA.
**Objectives**

To protect marine turtles, their eggs and nesting sites.

**Ecology and Conservation Status**

**Ecology**

The Sanctuary’s forests are mixed deciduous and evergreen. Notable biodiversity includes: Hawksbill Turtle; Olive Ridely Turtle; Big Headed Turtle; around 10 species of bird; and, the Hog Deer.

**Conservation Issues**

Threats from local fishermen include illegal harvesting of turtle eggs and accidental catches of turtles in fishing nets. In 1983 it was recommended that the island’s legal status as a wildlife sanctuary be strictly enforced and all turtle egg collection should cease.

**Local Livelihood Status**

While the Sanctuary is uninhabited, boatmen collect fresh water from the island. Fishing, turtle egg harvesting is also a common practice.

**Culture**

Not applicable to this site

**Ecotourism Role, Opportunities and Challenges**

**Current Role**

The Sanctuary currently receives few if any visitors.

**Opportunities**

The best time to travel the region is November to May. Turtle nesting sites can be of high interest to tourists, but need to be carefully managed and supported by responsible tour companies. Volunteer placements on turtle projects can be in a good initial step towards development a tourism product.

**Challenges**

The difficult, time consuming and relatively expensive access and lack of any tourism-related infrastructure on the island or nearby are major challenges. Other challenges include the lack of industry-related knowledge and skills at the destination level.

**Ways Forward**

Tourism activity is likely to be viable only if an interested and committed tour operator(s) can be found to help develop and market a high-quality tourism experience based on the turtles and their nesting habits and site.
Wetthikan Wildlife Sanctuary

Introduction:

Wetthikan Wildlife Sanctuary is located in Salin Township of Magway Region, approximately 185km South of Bagan (2.5 hours drive) and not far off the route to Shwesettaw Pagoda/Wildlife Sanctuary. The Sanctuary situated close to a tributary of the Ayeyarwaddy River and contains a 400 acre lake and a wetland area that is surrounded by mixed deciduous and dry forest.

Tourism Activity

Visitor Numbers

Visitor numbers are not formally collected. Local officials estimated approximately 500-1,000 visits a month. Visitor numbers peak during the weekends, holidays and during the festival season and are comprised of area residents and people visiting from other regions of Myanmar. Many of them making a side-trip on their way to Shwesettaw Pagoda. Approximately 60,000 people attend the annual Shin Bin Shwe Pyi Aye Pagoda festival. The Sanctuary receives few international tourists.

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Attractions

The wetlands, lake, and small pagoda on site provide a nice place to rest and relax for local people and visitors. There are local festivals that also attract people from outside the region to visit.

Facilities

Visitor facilities are centered around the Sanctuary’s wetland and its birds life. There is a nice walkway and viewing platform that extends over the reservoir and provides opportunities for visitors to get close to nature and relax. There is a guesthouse near the Sanctuary that can accommodate 12 people, and another that can accommodate 30 in nearby Salin town.

Tourism Revenue Generation

No entry or user fees are charged. The Sanctuary does not generate any revenue.
Park Management

Structure
The Sanctuary is managed under the office of the Shwesettaw Wildlife Sanctuary and supervise by a Park Ranger and 2 Foresters.

Objectives
The Sanctuary’s management objectives are to conserve the Sanctuary’s wetlands, moist and dry forest ecosystems; protect indigenous and migratory birds and their habitats; and, develop ecotourism and provide visitor education.

Ecology and Conservation Status

Ecology
The Sanctuary is home to 27 species of forest birds and 18 species of water birds. There are 3 resident species of turtle including the Indian Black, Flap Shell, and Asian Soft Shell

Conservation Issues
Small-scale illegal fishing, bird catching, and harvesting of NTFPs are the main concerns. The PA staff are countering these by conducting local awareness raising, patrolling and enforcement of regulations

Local Livelihood Status
Ten villages are located around the Sanctuary with a total population of approximately 8,000. Most households are involved in subsistence farming that includes shifting agriculture, animal husbandry, and supplemental activities such as fishing, hunting and casual labour. Thread production from lotus plants is also a significant local industry. There are issues related to illegal fishing and encroachment of agricultural land into the Sanctuary however these issue are minor as the PA itself is small and easily patrolled.

Engagement in Conservation
Sanctuary staff conduct regular awareness programmes in surrounding villages.

Culture
Production of weaving thread from lotus plants.
Ecotourism Role, Opportunities and Challenges

Current Role

Tourism plays a very minor role for the Sanctuary due to the modest number of visitors. The site’s natural beauty and unspoiled charm are the main attractions and present some opportunities to support conservation awareness raising and local economic opportunities.

Opportunities

- Diversify the product by displaying interpretation materials on the main platform area. This would increase the attractiveness of the site and support broad-based environmental awareness raising and enhance the visitor experiences.
- Additional service such as boat rental could generate more income options for local residents and the PA.
- There is some scope for enhancing local economic development by improving local supply chains that serve the visitor market.
- A 150 year old wooden pagoda and burial site of approximately 12 British soldiers killed during WWI could provide interesting features include in the tourism offering.

Challenges:

- The Sanctuary’s lack of a significant attraction, minimal facilities and services a limit visitor numbers and ecotourism development potential.
- A lack of facilities and services (time consuming and expensive travel) and little in the way of accommodation, are key factors constraining the development of tourism.
- Other more minor issues that might emerge include potential conflicts among stakeholders and local communities, unintended disturbance to wildlife and ecosystem, growth of illegal fishing, and waste and trash disposal in the Lake.
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