



MYANMAR

Ecotourism Policy and Management Strategy for Protected Areas



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

Good Practice Approaches for Developing Ecolodges in Myanmar

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Foreword

Myanmar is characterized by diverse ecosystems, rich biodiversity and a wealth of ethnic lifestyles and cultures. It is our responsibility to hand-over these gifts from nature, and the invaluable heritage of our ancestors, to our future generations.

Protected areas are established to conserve these gifts, including snow-capped mountains, wetlands, distinct forest types, seascapes, coral reefs and their constituent biodiversity. They are also powerful economic drivers that contribute not only to ecosystems and biodiversity conservation, but also to the development of our local, sub-national and national economies. At the same time, protected areas are perfect destinations for ecotourism.

The rapid expansion of Myanmar's tourism sector presents special opportunities to promote ecotourism that focuses upon our protected areas with their rare wildlife, beautiful land and seascapes, and diverse ethnic lifestyles and cultures. As we progressively open these special areas for ecotourism activity it is most important to safeguard and protect their unique and valuable assets. As we do so, all of us must share responsibilities. We must work together to raise environmental and cultural awareness and respect, to minimize negative impacts, to deliver direct financial benefits for conservation and livelihood development, to empower local people, and to consistently strengthen and improve management systems that sustain these areas.

The formulation of the Myanmar Ecotourism Policy and Management Strategy is very timely to assist with these tasks and ensure benefits are targeted directly towards community development and biodiversity conservation.

On behalf of the Government of the Republic of the Union of Myanmar, and as the chair of MOECAP's Ecotourism Steering Committee, I would like to thank the International Centre for Integrated Mountain Development (ICIMOD) for the financial and technical support to prepare the Myanmar Ecotourism Policy and Management Strategy. I also extend my sincere thanks to all the individuals and organizations who, through many preparatory workshops and meetings, contributed their knowledge and ideas to the Policy and Strategy's formulation.

H.E. U Win Tun

Union Minister

Ministry of Environmental Conservation and Forestry

Chairman, National Environmental Conservation Committee

The Republic of the Union of Myanmar



Foreword

Myanmar has recently experienced a rapid tourism growth due to significant economic, social, and political reform. Visitors have been keen to experience Myanmar's world renowned cities and unique, unspoiled cultural heritage. Accompanying this growth is a new demand, especially from discerning international travellers, to explore Myanmar's natural heritage in a way that is sustainable and aligned to principles of green growth. Recognizing this trend, the Ministry of Hotels and Tourism and the Ministry of Environmental Conservation and Forestry have developed this Ecotourism Policy and Management Strategy with technical assistance from the International Centre for Integrated Mountain Development, and financed by a grant from the European Union. Additional support has also been provided by The Greater Mekong Sub-region's Core Environment Programme.

Myanmar has an extraordinary wealth of natural ecosystems, which are home to a diverse range of flora and fauna including rare and endemic species. With visitor arrivals rapidly increasing, tourism to protected areas is also growing. The Ministry of Hotels and Tourism has a responsibility to ensure this development is sustainable, and that management systems that engage host communities are developed to protect these unique ecosystems. To this end, the preparation of this policy adopted a consultative approach whereby park wardens, local communities, civil society organizations, local and international non-governmental organizations, and government ministries were each engaged in information gathering and policy formulation processes.

The Ministry of Hotels and Tourism firmly believes inclusive and carefully planned ecotourism development can benefit protected areas and surrounding communities. This will happen through infrastructure investment, employment generation, visitor spending and conservation initiatives, which collectively contribute to poverty alleviation as the ultimate goal of our Myanmar Tourism Master Plan. Through this approach, Myanmar will progressively open its protected areas to domestic and international visitors.

This Ecotourism Policy and Management Strategy should be seen as a living document, which provides an underlying framework to guide the future development and action plans for Myanmar ecotourism.

H.E. U Htay Aung

Union Minister

Ministry of Hotels and Tourism

Figure 1: Myanmar's 21 Designated Ecotourism Sites



Disclaimer: The names shown and the boundaries used on this map do not imply official endorsement or acceptance by the United Nations.

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Executive Summary

Myanmar's tourism industry is enjoying substantial growth and outperforming other sectors of the economy. As a labour intensive industry with extensive linkages to other economic sectors and a reputation for systematically lifting thousands of households from poverty, tourism is a national priority of the Republic of the Union of Myanmar.

The 2013-2020 Myanmar Tourism Master Plan is aligned with the National Comprehensive Development Plan, and sets out an inclusive wide-ranging framework to strategically develop the country's vast tourism potential. To promote green growth, mitigate the effects of climate change, avoid irreversible damage to Myanmar's flagship habitats and at the same time diversify the tourism economy, Key Objective 4.2 of the Master Plan advocates for the development of an ecotourism management strategy for Myanmar's protected areas.

Globally, ecotourism has long been associated with environmental, social and economic benefits for destination communities. It also focuses on interpretation to deliver quality visitor experiences. Controversy has however hampered this niche market with accusations of 'green-washing' targeted towards tour operators and accommodation providers, and charges of poor management directed towards government and other agencies with management oversight. To address such challenges, IUCN's World Commission on Protected Areas recently launched its third detailed publication highlighting the unparalleled benefits that carefully planned tourism can bring to protected areas and surrounding communities. The report recognizes tourism is an essential component of protected area planning, as they increasingly depend on income and other related benefits generated by this dynamic and pervasive industry.

As Myanmar opens up for international tourism, and domestic tourism also ascends to new heights, the Ministries of Hotels and Tourism and Environmental Conservation and Forestry have prepared the Myanmar Ecotourism Policy and Management Strategy. Building on the Union Government's socioeconomic, tourism, biodiversity, forestry and climate change frameworks, this Policy and Strategy focuses specifically on the relationship between tourism and protected areas relationship. Its recommendations are based on an extensive review of strategic issues currently shaping this policy arena, including an assessment of destinations designated for ecotourism by the Union Government. Recognizing the critical importance of 'getting ecotourism right from the outset', the Policy and Strategy sets out a long-term vision for the sector, together with a five-year management strategy that sets the foundations for managing the tourism and protected areas. The Policy defines what ecotourism means in the Myanmar context, and lays out a sector vision that states

"We intend to use ecotourism as a driving force to strengthen the management of Myanmar's expanding protected area network. Our aim is to engage all stakeholders to implement ecotourism policies, business models and management approaches that protect the unique ecosystems of our country and celebrate indigenous groups that have made these special areas their home."

Leading on from this vision, the Policy's mission statement acknowledges the prerequisite for carefully managed tourism businesses in protected areas. It prescribes the need to design and embed an Ecotourism Partnerships Framework to "guide decisions related to the form, scale and management systems of business services that are appropriate to site conditions, and that simultaneously support and part-finance protected area objectives." Ten guiding principles intended to become mantras for all stakeholders to help ensure net benefits are delivered to protected areas and their host communities have also been developed.

Focusing on the Policy and Strategy's implementation, 14 key objectives are set out under six strategic programs as follows.

Strategic Program 1: Strengthen Institutional Arrangements

- develop an ecotourism planning and management framework
- strengthen the legal and regulatory environment for ecotourism
- develop an Ecotourism Partnerships Framework

Strategic Program 2: Strengthen Ecotourism Planning in and around Protected Areas

- build human resource capacity in ecotourism planning and management
- design ecotourism management plans for protected areas

Strategic Program 3: Engage Local Communities

- raise community awareness of ecotourism and protected area issues and opportunities
- promote business opportunities for protected area communities
- build private sector knowledge of good practices in engaging protected area communities

Strategic Program 4: Invest in Infrastructure and Responsible Business Models

- improve infrastructure in and around protected areas
- promote innovative business models for protected areas
- promote responsible practices in elephant tourism

Strategic Program 5: Strengthen Research and Monitoring Frameworks

- deepen knowledge of the tourism and protected areas relationship

Strategic Program 6: Strengthen Marketing and Interpretation

- raise national awareness of Myanmar ecotourism
- develop and align a Myanmar Ecotourism Marketing Plan within the broader tourism marketing strategy

As an extension of the wider Myanmar Tourism Master Plan, the Ecotourism Policy and Management Strategy also advocates mainstreaming seven cross-cutting themes: gender equity, environmental sustainability, partnership, innovative financing, regional cooperation, ensuring access for disabled people, and consultation and participation.

The Government of Myanmar (GOM) recognizes the development of Myanmar's ecotourism will be a step-by-step process. At the protected area level, in the first instance comprehensive and inclusive conservation management plans will be prepared and, once approved, detailed ecotourism management plans that support conservation objectives will be designed. Given resource constraints, GOM acknowledges it is not possible to simultaneously prepare conservation and ecotourism management plans for all protected areas designated for ecotourism at the same time. Decisions as to which protected areas are prioritized for management planning depend upon a range of factors including accessibility, current visitor numbers, community interests, and safety and security issues. Given private sector and development partner interests also influence where and how resources are allocated, GOM will work with all stakeholders to ensure management plans for 10 priority protected areas are in place by 2020. Where market interest is high and technical resources available, efforts will also be taken to prepare conservation and ecotourism management plans for additional sites,

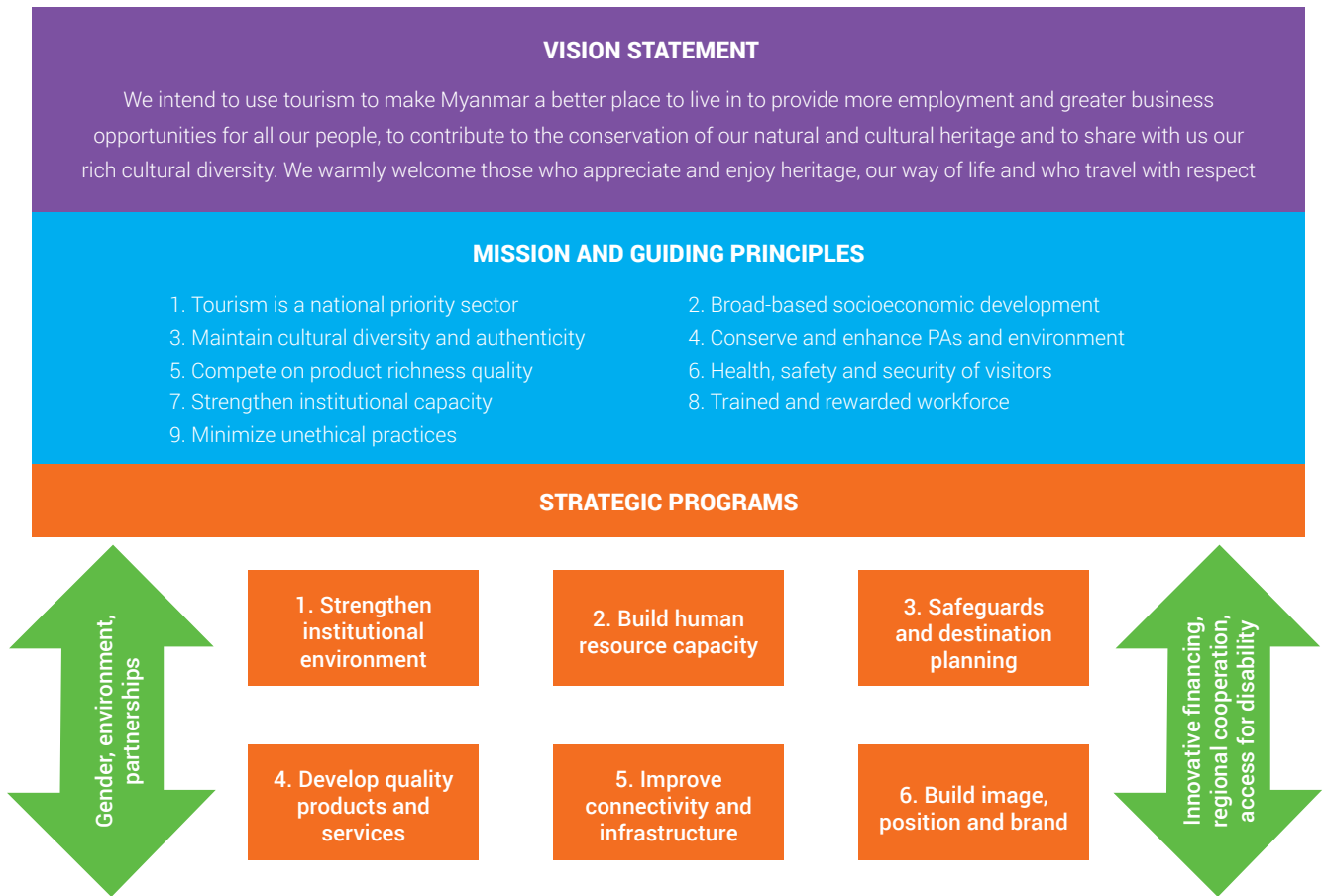
In terms of impact, almost 6.5 million people live in the townships that are home to the 21 designated ecotourism sites, and over 3 million people reside in the townships that are home to the 10 PAs identified as priority sites for ecotourism development. A current lack of tourism-related data on levels of visitation, spending, investment and employment to these sites prevents the compilation of growth forecasts and targets. The promotion of ecotourism activity to these destinations is however intended to deliver a wide range of social, environmental and economic benefits to a significant percentage of resident populations, which in most instances are marked by remoteness and poverty. Implementation of this Policy and Strategy will yield a variety of data to enable forecasting and impact measurement in the future.

An indicative budget of USD 14.955 million dollars is required to implement the Policy and Strategy between 2015 and 2020. Additional but as yet unspecified investments (i) in infrastructure to improve access to, and around, PAs and, (ii) to implement individual ecotourism plans for the 10 priority PAs over the next five years will also be required and are not included in this Policy and Strategy.

Introduction

Tourism is a labour intensive industry and probably the fastest growing sector of Myanmar's economy. It is a national priority of the Government of the Republic of the Union of Myanmar (GOM) due to its ability to promote inclusive economic growth and accelerate poverty reduction. Aligned with GOM's Responsible Tourism Policy, the 2013-2020 Tourism Master Plan provides a comprehensive framework to develop domestic and international tourism (Figure 2).

Figure 2: Myanmar Tourism Master Plan Framework



Recognizing the current tourism product is largely centred around cultural and urban assets, Strategic Program 4 of the Master Plan focuses on sector diversification and the development of quality products and services. Key Objective 4.2 of this program 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 MOECAF’s Ecotourism Management Committee, MOECAF 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.”

Taking its lead from the Master Plan, this Ecotourism Policy and Management Strategy is concerned with the key objective to develop and manage tourism activity in and around Myanmar’s national protected areas. As illustrated in Figure 1, Myanmar has an extensive network of protected areas and 21 Ecotourism Sites designated by the Ministry of Environmental Conservation and Forestry¹ (MOECAF). Inclusion of an additional site, the Ayeyardwady Dolphin Protected Area, managed by the Ministry of Livestock and Fisheries, is currently under consideration, and GOM may designate further sites in the future.

Individual protected areas (PAs) are part of national PA networks formed to conserve representative examples of natural capital, biodiversity and ecosystems. Well-managed PA networks are critical to both biodiversity conservation and arresting climate change. Despite these critical roles, PAs face difficult challenges to secure adequate budgets to cover their conservation management costs. Ecotourism to PAs is an activity that can contribute towards such costs and provide wider management support, not least because product viability depends on the conservation of the biodiversity and ecosystems that tourists seek to visit. Globally, it is estimated there are around eight billion visits to PAs each year. Income from this activity generates in excess of USD 600 billion per annum, which contrasts sharply with the less than USD 10 billion spent annually on safeguarding these sites². Critics argue greater investment to prevent degradation, encroachment and illegal harvesting will serve to increase the overall yield obtained from ecotourism activity to PAs. Recognizing the potential of this special relationship, the focus of the Myanmar Ecotourism Policy and Management Strategy on strengthening protected area management is aligned with GOM’s National Forest Master Plan (2001-2030), the National Biodiversity Strategy and Action Plan (currently under review) and the 2013 Biodiversity Conservation Investment Vision.

The Myanmar Ecotourism Policy and Management Strategy sets out a vision, mission, guiding principles and strategic programs for managing the tourism and protected area relationship to 2025. It seeks to maximize the contribution of ecotourism to both PA management and the livelihoods of communities that live in and around these special areas. At the same time, it seeks to capitalize upon the exotic and iconic imagery of these special areas to promote greater international awareness of Myanmar’s diverse and remarkable ecosystems, and so deliver higher countrywide visitation. The Policy and Strategy also aims to minimize any negative impacts that may result from this particular form of tourism.

Preparation of the Ecotourism Policy and Management 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.

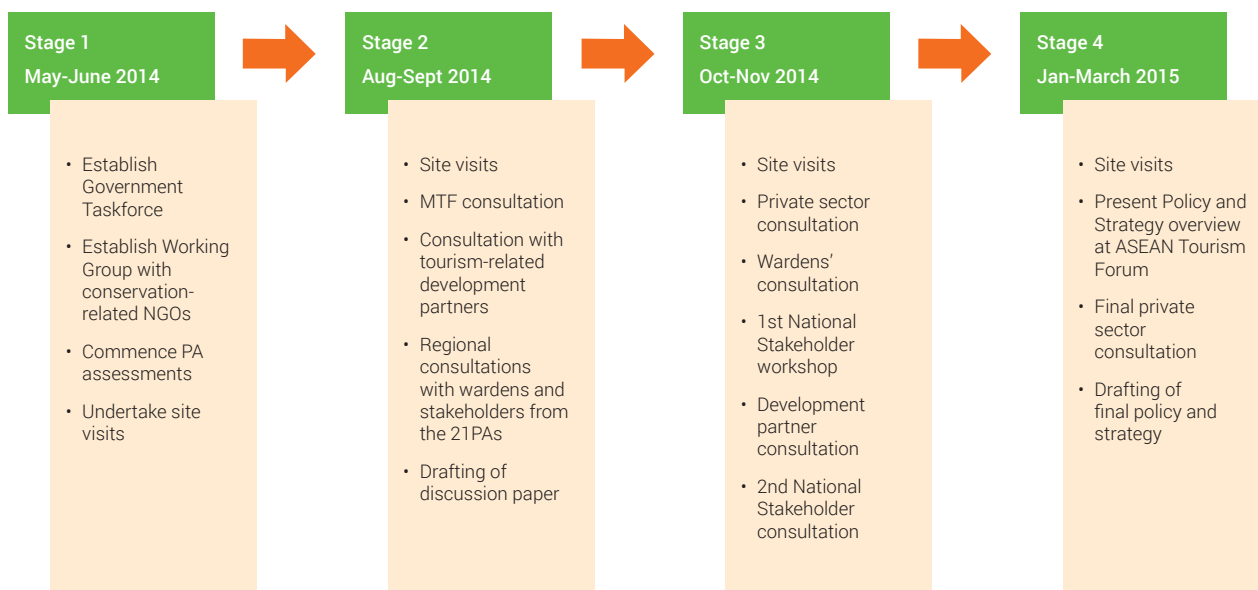
Development of the Policy and Strategy involved a situational analysis of the 21 designated ecotourism sites undertaken with additional support from The Greater Mekong Sub-region’s Core Environment Program (administered by ADB through the GMS Environmental Operations Center). It also comprised extensive stakeholder consultations and a review of internationally accepted good practices in tourism and PA planning and management. As depicted in Figure 3, this included the creation of a GOM Ecotourism Task force with 11 government Ministries and an Ecotourism Working Group with Myanmar’s conservation-related NGOs and the Myanmar Tourism

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

²Balmford A, Green JMH, Anderson M, Beresford J, Huang C, Naidoo R, et al. (2015) Walk on the Wild Side: Estimating the Global Magnitude of Visits to Protected Areas. *PLoS Biol* 13(2): e1002074. doi:10.1371/journal.pbio.1002074

Federation (MTF). It also embraced site visits to 17 of the 21 designated sites, two national workshops, four regional workshops and seven focus group meetings. 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 this policy and strategy.

Figure 3: Process to Prepare the Myanmar Ecotourism Policy and Management Strategy



ASEAN = Association of South-East Asian Nations; MTF = Myanmar Tourism Federation

The Policy and Strategy is divided into four parts. Part I focuses on strategic issues and begins with an overview of the assessment findings including a summary analysis of and the context for developing Myanmar Ecotourism, details of current visitation to Myanmar's PAs, institutional and infrastructure issues, and considerations for greater community engagement. Part I concludes with a summary of the strengths, constraints, opportunities and risks associated with this sub-sector and niche market. Based upon this assessment, Part II concentrates on the core policy by setting out a distinctive definition, vision, mission and guiding principles for Myanmar ecotourism. Part III is concerned with the management strategy to carry the sector forward. It articulates six strategic programs and short and medium-term activities to guide the policy's implementation. Part IV concludes with implementation, monitoring and budget requirements. The Policy and Strategy is supported by two annexes published as separate documents (i) a report profiling the process to prepare the Policy and Management Strategy together with summary findings from the wider assessment and fact sheets profiling the tourism and conservation condition of the sites assessed; and, (ii) guidelines for developing ecolodges in Myanmar.

Part I

Strategic Issues



Part I

Strategic Issues

Country and Protected Area Context

Covering an area of 676,577km², Myanmar is blessed with a wide diversity of ecosystems from the dense coniferous forests and alpine habitats of the Eastern Himalayas, to the mangrove forests and tropical coral reefs of the Myeik Archipelago.

GOM recognizes this rich diversity of landscapes and ecosystems, together with the contrasting patterns of ethnic and cultural adaptation to these landforms, provides strategic opportunities for Myanmar's expanding tourism industry. It also recognizes that under the right conditions: (i) tourism can be harnessed to help protect and conserve contrasting ecosystems and habitats; (ii) PAs are the best platforms to develop such models of good practice; and, (iii) lessons learned from these models can be applied beyond PAs. This approach aligns with and underscores GOM's commitment to green growth.

As a signatory to the Convention on Biological Diversity, Myanmar is committed to establishing a PA network. Work to establish PAs began with the designation of three PAs in 1918, namely Pidaung Wildlife Sanctuary, Pyin-O-Lwin Bird Sanctuary and Shwe-U-Daung Wildlife Sanctuary. Almost 100 years later the network's expansion embraces 39 PAs covering an area of just over 38,915km² or 5.75% of Myanmar's total land mass. Six additional PAs are proposed that, when declared, will take the total PA land area to almost 50,000km² or 6.8% of the country's total land area. In its 30 year Forestry Master Plan, GOM has committed to expand PA coverage to 10% of total land area by 2030. The current PA network includes one RAMSAR Site and seven ASEAN Heritage Parks. Inlay Lake has also been nominated for inclusion in UNESCO's Man and Biosphere Programme. Unlike any other industry, ecotourism offers PAs a range of economic, social and environmental benefits to support their effective management. Benefits include: generation of revenues to finance PA management; direct and indirect alternative income and employment opportunities for local communities; and, greater public advocacy for stronger PA management. At an individual level, GOM recognizes visits to PAs offer opportunities for personal and spiritual growth, social bonding, and an appreciation of the need for stewardship approaches³ to PA management.

Recognizing the benefits and demand for tourism activity in and around its protected areas, MOECF 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 a PA staff and Warden's Office. Responsibilities for managing ecotourism within MOECF are divided between two committees, namely an Ecotourism Steering Committee (ESC) and an Ecotourism Working Committee. The higher-level Ecotourism Steering Committee, is composed of five MOECF representatives including the Union Minister (Chairman), the Director General of the Planning and Statistics Department (Member), the Director General of the Dry Zone Greening Department (Member), the Managing Director of Myanmar Timber Enterprise (Member) and the Director General of the Forest Department (Secretary). Within the context of its PAs and designated ecotourism sites, the Steering Committee is responsible for:

³In this particular context, stewardship approaches implies efforts to create and instill a responsibility among individuals, communities and resource users to sustainably manage and conserve the natural assets of PAs

*"(i) formulating Ecotourism Policies; (ii) issuing orders and directives to implement ecotourism in accordance with laws and procedures; (iii) permitting the ecotourism related matters, submitted by the Ecotourism Working Committee, in accordance with protocols; (iv) coordinating with relevant departments and organizations; (v) coordinating with foreign and local ecotourism agencies, organizations and companies; and, (vi) giving guidance for the sustainable development of ecotourism."*⁴

Working under the Ecotourism Steering Committee is MOECAF's Ecotourism Working Committee, which is chaired by the Director General of the Forest Department with the Deputy Director General of the Forestry Department as vice chair. Twenty three other members include the General Manager of the Myanmar Timber Forest Enterprise (extraction) and 21 Forest Department Directors from Administration Division, Planning and Statistics Division, Natural Forest and Plantation Division, Extension Division, Budget and Accounts Division, States and Regions Forest Department, Zoological Gardens Division and Nature and Wildlife Conservation Division (Secretary). Responsibilities of the Working Committee include:

*(i) implementing ecotourism policies, orders and directives developed by ESC; (ii) directing and informing ecotourism policies, orders and directives to relevant organizations; (iii) designating ecotourism sites; (iv) allowing after stipulating conditions, ecotourism upon the request from departments/ organizations/companies; (v) examining the legal status of companies which apply permission for ecotourism; (vi) allowing, after approval of higher officials and security bodies, the travel to the restricted areas and prohibited places; (vii) registering the visitors entering to protected areas, and submitting the monthly visitor reports to ESC; (viii) preparing ecotourism action plans for protected areas, and investing part of ecotourism income in protected areas development; (ix) directing ecotourism development in protected areas, zoological gardens and botanical gardens; and, (x) coordinating with related departments, foreign and local travel firms and companies for ecotourism development."*⁵

As encapsulated above, Myanmar's policy environment is supportive of, and creating an enabling environment for, tourism in and around PAs. From a regulatory perspective, the "Protection of Wildlife and Protected Areas Law" (June 1994) provides the legal basis for tourism activity in PAs. The Law permits the Director General of the Forest Department, with approval from the Minister, to stipulate conditions under which recreation activity may be undertaken within PAs. It also states recreation is permitted within PAs "without causing damage to the natural environment." GOM recognizes adjustments to the provisions of the Law and its rules are required to create a clearer legal and regulatory basis for tourism activity in PAs, particularly with regard to ecotourism business activity in PAs. GOM also recognizes there is a need to develop regulations for each PA that relate to prevailing site conditions and local resource use issues. Further, where opportunities exist to provide ecotourism-related business services, GOM's policy is for resident communities to be given special consideration to operate and benefit from such businesses.

Accessibility

Access is a critical variable influencing the viability of a location as a tourism destination. Travel times to the 21 designated ecotourism sites vary considerably according to the mode of transport and season of travel. Where distances from existing visitor hubs (Yangon, Mandalay, Bagan and Inlay) are considerable, flight costs may also be viewed as a factor likely to influence tourist, tour operator and investor choices to visit or invest in a destination.

Table 1 groups the 21 designated ecotourism sites into three categories according to the measure of access constraints facing the destination. Issues to be addressed include, for example, investments in major road improvements between destinations that often cross state/region boundaries, a lack of readily available public transport, and the promotion of direct rather than multi-stop flights. It is noted that a lengthy journey might not always be viewed as a barrier to tourism development, and can form a valuable part of the travel experience or serve to safeguard destination exclusivity.

⁴MOECAF Notification no. (90) 4 May 2011

⁵MOECAF Notification no. (90) 4 May 2011

Table 1: Extent of Access Issues Influencing Destination Development

Time consuming access constraints	Some difficult access issues to resolve	Access not a major issue
Hkakaborazi	Alaungdaw Kathapa	Hlawga
Hponkanrazi	Chattin	Inlay
Hukaung Valley	Natmataung	Kyiakhtiyo
Indawgyi	Meinmahla Kyun	Lawkanandar
Lampi	Panlaung and Pyadalin Cave	Moeyungyi
Thamihla Kyun		Phokyar and Myaing Hay Wun
		Shwesettaw and Popa Mountain
		Wetthikan

Tourism access and activity to some PAs is constrained by a need for multiple permissions or lengthy approvals to visit some sites. While GOM is easing restrictions to visit the 21 sites, in practice visits to some PAs - including Panluang and Pyadalin Cave for example - requires permission from MOECAP, the Ministry of Agriculture and Irrigation and district government offices. Similarly, the 2-3 week processing time needed to approve high-end cruises to Lampi reportedly causes some visitors to travel elsewhere. Greater coordination is needed to (i) clarify approvals needed to visit each of the designated PAs and, (ii) improve the efficiency of the approvals process.

Safety and Security

Security is a second critical variable influencing the viability and stability of tourism destinations. Visitors need to be free from harm and need to know they are safe and secure when moving around a destination. While conflict situations directly and indirectly affect some of the PAs, such as Hukaung and parts of Indawgyi, the remoteness of others such as Hkakaborazi, Hponkanrazi and Lampi also raise safety concerns. Where visitors risk injury or illness through adventure activities such as mountain climbing, rafting, scuba diving or close-up wildlife viewing, for example, there is a need for coherent treatment and efficient evacuation procedures. A failure to respond to incidents in a timely and appropriate manner may exacerbate health conditions or result in negative publicity affecting the wider destination. While the Ministry of Social Welfare has prepared crisis and emergency response plans, effort is needed to ensure all tourism-related stakeholders are familiar with these procedures – especially for high-risk PAs.

Visitation and Seasonality

While data profiling visitation to the 21 designated sites is not systematically available for all sites, Table 2 profiles domestic and international visitor arrivals to most PAs for 2014. Ten PAs currently receive less than 500 domestic visitors per year, with most visits linked to pilgrimage and festivals at celebrated pagodas. For example, only a small minority of the approximately two million annual domestic visitors to Kyiakhtiyo visit the surrounding wildlife sanctuary. Meanwhile, 15 PAs receive less than 500 international visitors per year, mainly due to access constraints, a lack of accommodation and information and current product substance. In other words, visitation to most PAs is very low, and in some cases marginal or non-existent. Tourism activity to at least 12 of the 21 sites is restricted due to seasonality issues.

A number of conclusions might be drawn from Table 2. First, the table highlights in bold italics the PAs with the most immediate domestic and international market potential. While visitor use patterns will change over time, the figures currently suggest Inlay, Kyiakhtiyo and Lawkanandar appeal to both domestic and international markets; whereas Alaungdaw Kathapa, Indawgyi, Moeyungyi, Shwesettaw and Wetthikan mostly appeal to domestic visitors; and Lampi appeals primarily to international visitors. Although visitor numbers for Chattin, Hkakaborazi, Hponkanrazi, Hukaung Valley, Mainmahla Kyun, Myaing Hay Wun, Panlaung&Pyadalin Cave and Thamihla Kyun are all very low, Hkakaborazi, Hponkanrazi enjoy high interest from private sector operators, and improved access to these and other sites could result in a solid growth of visitor arrivals.

Table 2: Visitor Arrivals to Designated Ecotourism Sites 2014

Protected Area	Visitor Arrivals 2014		Seasonality issue
	Domestic	International	
Alaungdaw Kathapa	230,000	30	✓
Chattin	155	0	✓
Hkakaborazi	18	5	✓
Hlawga	227,542	1,071	✗
Hponkanrazi	<150	<150	✓
Hukaung Valley	0	0	✓
Indawgyi	200,000	<50	✓
Inlay	200,000	100,000	✗
Kyiakhtiyo	1,000,000	30,000	✗
Lampi	0	1,000	✓
Lawkanandar	26,157	29,802	✗
Meinmahla Kyun	9	20	✓
Moeyungyi	7,031	303	✓
Myaing Hay Wun	0	0	✓
Natmataung	734	426	✓
Panlaung and Pyadalin Cave	<100	<10	✗
Phokyar	339	682	✗
Popa Mountain	4,236	6,213	✗
Shwese ttaw	200,000	<10	✗
Thamihla Kyun	0	0	✓
Wetthikan	60,000	<10	✗

Accommodation

While not without risks of negative impacts, partnership agreements to provide well-planned, low impact accommodation in PAs can offer the greatest financial benefit to PA networks. As illustrated in Table 3, at least 12 of the sites have significant limitations in regards to accommodation. Some have no accommodation within or near the PA, while others have simple guest houses or converted village houses which need up-grading to attract wider, 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.

It might be said that some PAs such as Lawkanandar don't require accommodation, in this case due to the small size of the PA and ease of access from existing accommodation. Inlay, by contrast, already has 16 hotels/resorts within the PA or in the planning stages. Most of these were established more than 10 years ago with insufficient regard to PA planning approaches and principles, and with little if any direct financial benefit to the PA. A similar situation exists with regard to Kyiakhtiyo, Moeyungyi and Natmataung. A lease agreement process is currently underway to establish an ecolodge within the Lampi Marine National Park. Further attention is needed to 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.

Table 3: Accommodation in or Very Close to the 21 Designated Ecotourism Sites

Protected Area	Accommodation		Protected Area	Accommodation	
	H	GH		H	GH
Alaungdaw Kathapa	0	2	Meinmahla Kyun	0	1
Chattin	0	1	Moeyungyi	0	1
Hkakaborazi	0	0	Myaing Hay Wun	1	0
Hlawga	0	11*	Natmataung	3-4	2
Hponkanrazi	0	0	Panlaung and Pyadalin Cave	1	2
Hukaung Valley	0	3	Phokyar	1	0
Indawgyi	0	2	Popa Mountain	1	5
Inlay	16	26	Shweseztaw	0	1
Kyiakhtiyo	3	0	Thamihla Kyun	0	0
Lampi	0	0	Wetthikan	0	2
Lawkanandar	0	0			

H = Hotel / Resort; GH = Guest House

* the 11 guest houses are for day use only, and are currently not available as overnight accommodation

Natural Assets

Myanmar's 21 designated ecotourism sites offer a wide diversity of nature-based attractions embracing, for example: exotic wildlife such as wild elephants, leopards, tigers, gibbons, turtles and many rare birds; remarkable flora including mangroves and rare orchids; as well as, stunning landscapes from Himalayan vistas to tropical islands. The Assessment report available as a separate annex to this document describes in greater detail the natural assets that comprise the unique-selling points of each of these sites. In addition to these specific assets, seven of the PAs are ASEAN Heritage Parks, namely Alaungdaw Kathapa, Hkakaborazi, Indawgyi, Inlay, Lampi, Meinmahla Kyun and Natmataung. GOM recognizes that additional effort is needed to promote greater national and international awareness as to the significance and special qualities of these assets, and to promote a coordinated approach to the interpretation of high-visitation PAs including its ASEAN Heritage Parks and RAMSAR site.

Elephant Tourism

Elephant tourism is worthy of special consideration within the context of this policy and strategy, because: (i) with some 3,000 wild elephants and 4,649 registered domestic elephants, Myanmar has one of the largest elephant populations in Southeast Asia; (ii) elephant populations often reside in and around PAs; (iii) humane treatment of captive animals is consistent with the aims and objectives of Myanmar Responsible Tourism Policy; and, (iv) perspectives on what constitutes good practices in elephant tourism is developing at pace in the global tourism industry.

In Myanmar, domesticated elephants are regularly used at Alaungdaw Kathapa to transport tourists to religious shrines mainly during the pagoda festival period, which starts in December and ends in April. Moreover, two of the 21 designated ecotourism sites are elephant camps leased by MOECAP to the private sector. The future of these operations is however not certain, as Myaing Hay Wun Elephant Camp has received few if any visitors over the last 12 months, and consideration is being given to re-locating Phokyar Elephant Camp due to insufficient grazing land for resident elephants. In addition, structural changes to MOECAP's Myanmar Timber Enterprises, including a significant reduction in the number of elephants employed in timber extraction, have resulted in (i) five other elephant camps looking to elephant tourism as a potential means of economic viability and (ii) a program to develop a National Elephant Action Plan. Given this context, guidance is needed to point the way towards responsible practices for elephant tourism in Myanmar.

Cultural Assets

As noted above, the primary motivation for most domestic tourism to the 21 designated sites is for cultural and spiritual purposes rather than to observe and enjoy the natural assets of these areas. As depicted in Table 4, 13 of the PAs have distinctive cultural heritage assets: seven are largely focused around nationally significant festivals and pagodas that in most cases attract hundreds of thousands of domestic visitors each year; four are centred around distinctive cultural landscapes where farming and livelihood strategies are (or are likely to become) an integral feature of the tourism product and visitor experience; and two are focused almost exclusively upon the characteristics of distinctive ethnic groups. Focusing upon this latter category, GOM recognizes that considerable sensitivity and consultation is needed to allow ethnic communities to determine for themselves if, when and how they would like to engage in any tourism system. Where engagement is mutually approved, sensitivity and patience will be needed to bridge cross-cultural divides and ensure the expectations of ethnic communities and their visitors are properly aligned. In addition, actions are needed to: (i) improve the quality of the domestic visitor experience; (ii) reduce negative impacts that occur during high-visitation periods; and (iii) encourage pilgrims to stay longer in the PAs to enjoy nature, diversify the product offering and promote ecotourism.

Table 4: Basic Characteristics of Cultural Heritage Assets

Festival and pagoda-based cultural products		Cultural landscape focus	Ethnicity
Alaungdaw Kathapa	Popa Mountain	Hkakaborazi	Lampi – traditions of the Moken
Indawgyi	Shwesehtaw	Hponkanrazi	
Inlay	Wetthikan	Hukaung Valley	Natmataung – traditions of the Chin, namely face tattooing
Kyiakhtiyo		Inlay	

Community Involvement

Ecotourism activity can generate a variety of income and employment opportunities to reduce the dependency of local communities on the natural resources of PAs⁶. The extent to which this objective can be achieved typically depends on a variety of destination-related variables 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 local communities to engage in tourism-related supply chains.

Ten of the 21 designated sites have few if any tourists and no tourism-related supply chains. Four of the PAs (Hlawga, Kyiakhtiyo, Inlay and Lawkanandar) have established year-round tourism-related supply chain linkages with surrounding communities. Six PAs have established tourism-related linkages associated mainly with annual festivals frequented by domestic visitors (Alaungdaw Kathapa, Indawgyi, Popa Mountain, Shwesehtaw and Wetthikan). Two of the PAs have some tourism-related supply chain activity, although these linkages may be relatively modest (Moeyungi and Natmataung). There is however little if any research to profile: (i) the size and significance of these supply chains; and, (ii) the extent to which they have reduced any household and community dependency upon the flora and fauna of the PAs.

In addition to engagement in supply chain activity, the annual work plans of each of the PAs include activities to engage local communities in conservation awareness programs and / or alternative livelihood programmes. These initiatives are specifically designed to reduce resource dependency upon the PAs and, to increase their effectiveness, would benefit from more substantial budgets and interventions. Model projects are also needed to impart skills and market knowledge to local entrepreneurs to increase tourism-related supply chain activity, and deliver greater benefits to local communities. The importance of such model projects and innovative investments to engage host communities cannot be understated as almost 6.5 million⁷ people live in the townships that embrace the 21 sites. While ecotourism activity in and around these sites is not intended to evolve into mass tourism, or be capable of delivering benefits to each and every surrounding household, it is capable of delivering meaningful social, environmental and economic benefits to a significant percentage of this population. GOM recognizes the importance of identifying the most appropriate indicators to measure the impacts and benefits of ecotourism activity.

⁶ This includes, for example: employment in hotels 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.

⁷ Township population data supplied by the Myanmar Information Management Unit

Management Capacity

Staff numbers working in the PAs vary considerably between them. While each PA has a prescribed number of posts required for management purposes, few if any of the PAs have all of these posts filled. Most PA wardens report they lack staff numbers to effectively manage their PA (especially with regard to patrolling and community outreach programmes); and, with tourism-related skill sets to engage in tourism planning and management activities. Lack of human resources is a particular constraint where visitor numbers are growing or already high. A similar situation exists at the central level, where skill sets are needed to oversee the delivery of priority projects and programs in flagship sites, and encourage replication of good practices elsewhere.

While a number of the PAs are currently preparing five-year management plans, most operate according to an annual planning cycle. Wardens generally rotate between PAs every three years. While Inlay has benefitted from the three five-year action plans for the Sustainability of Inlay Lake and Environmental Conservation and a fourth is currently being prepared, it has not benefited from sufficient human or financial resources to properly implement these plans. A five-year management plan has recently been prepared for Lampi. Three of the 22 designated sites are leased to the private sector (Hlawga Park, Phokyar and Myaing Hay Wun Elephant Camps).

Beyond human resources, PA management also suffers from other resource limitations related to transportation, monitoring equipment and computer access, which combine to restrict management capability in a number of areas, including impact monitoring and visitor management.

Funding Mechanisms

At present Hlawga, Inlay, Kyiakhtiyo, Lawkanandar, Moeyungyi and Natmataung charge visitor entry fees but the income generated does not always contribute to PA management costs. A similar situation exists with regard to accommodation agreements with the private sector, and there are currently few if any good examples of tour operators that undertake ecotourism-related activities within PAs entering into user-fee agreements with PA management bodies. Where agreements do exist, there is often a need for clearer guidelines setting out roles and responsibilities of the government, private sector and other parties and improved implementation practices by public and private sector entities to ensure conservation objectives are achieved and to reduce negative impacts.

Stakeholder Issues

Each of the 21 designated sites have their own mix of ecotourism-related stakeholders that typically embrace different government ministries⁸, private sector actors⁹, development partners, local households and communities. Although tourism is a complex activity demanding coordination and cooperation among a variety of stakeholders, tourism committees have yet to be established for any of the PAs. Following the review of tourism and conservation issues affecting the 21 sites, GOM recognizes that its key stakeholders are:

- high-level state/regional government officials able to secure significant budgets to, for example, undertake road and access improvement projects;
- MOECF officials with responsibilities to determine where accommodation (ecolodge) projects and lease agreements are needed and to set out transparent processes to prepare investment and management contracts with the private sector and other actors;
- private sector actors, most notably tour operators and accommodation providers that are willing to invest in product and destination-related projects and activities;
- MOHT officials with accommodation, license processing, marketing and project-related responsibilities, including the creation of destination management organisations;
- local entrepreneurs and communities motivated to seek income and employment opportunities in the tourism sector, and engage with public and private sector actors in tourism and PA planning and management processes; and
- Development partners interested to support conservation agendas, the implementation of destination-level interventions, and strategic components and actions of this policy and strategy.

⁸ E.g. Ministries of Environmental Conservation and Forestry; Hotels and Tourism; Agriculture and Irrigation; Border Affairs; Construction; Culture; Labour, Employment and Social Security; Religious Affairs; Transport

⁹ Including local entrepreneurs; in-bound and out-bound tour operators; investors; accommodation providers; guides

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 alarming developments that threaten the integrity, aims and objectives of these sites. These include, for example: over-population of non-native macaques in Hlawga; crowding and noise pollution of boats on Inlay Lake; poor waste management polluting water-courses 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.

Strengths, Constraints, Opportunities, and Risks

By way of review to Part I, Table 5 summarizes the strengths and opportunities for developing Myanmar ecotourism, together with the constraints and risks to be addressed.

Two years after the launch of the Myanmar Tourism Master Plan, tourism continues to be a national priority and is probably the fastest growing sector of the economy. As the sector grows an increasing number of visitors, tour operators and investors are looking to explore new destinations across the country, just as communities in and around protected areas are increasingly interested to seek income and employment opportunities the sector can provide. GOM recognizes that by promoting tourism activity in and around protected areas it is meeting the market needs and interests of a diversity of stakeholders. It also recognizes this niche sector offers new opportunities to promote inclusive rural development and green growth, as well as strategies for climate change mitigation and adaptation. Similarly, it acknowledges that ecotourism has a significant role to play in raising national awareness of the challenges of sustainable development, and the need to work collectively to preserve Myanmar's precious natural heritage. This policy and management strategy reaffirms GOM's commitment to international protocols such as the Convention on Biological Diversity, and signals intent to work with all partners to achieve the vision and mission set out in the following section.

Table 5: Strengths, Constraints, Opportunities and Risks for Myanmar Ecotourism

Strengths	Constraints
<ul style="list-style-type: none"> • Tourism is a national priority • Strong growth in visitor arrivals with high interest in new products and destinations • Extensive intact ecosystems • Unique range of natural assets from the Himalayas to tropical islands • Rich cultural assets in many PAs • High media interest in Myanmar tourism and the country's natural assets • Committed and progressive Ministries 	<ul style="list-style-type: none"> • Unacceptable impacts and change already occurring in some sites • Low positioning of PAs in state/regional planning • Poor accessibility to and around many PAs • Low skill sets of communities in and around PAs • Lack of technical human resources • Insufficient coordination among public and private sectors • Weak regulatory environment
Opportunities	Risks
<ul style="list-style-type: none"> • Diversification of tourism product • Job creation • Engage local communities in PA management • To set in place best practice approaches from the outset • Promote green growth • Develop rural economies • To replicate good practice beyond PAs • To become a regional showcase for tourism and PA management 	<ul style="list-style-type: none"> • Continued low positioning of PAs in State/Regional planning • Conflicts and instability in some areas • Poor enforcement of regulatory environment • Poorly designed and executed public-private partnerships • Lack of civil society interest in ecotourism and PA agenda • Accidents involving visitors in remote locations

Against these opportunities, the constraints and risks that must be addressed to carry this agenda forward cannot be taken lightly. GOM will continue to work to ensure protected area goals and objectives receive a higher profile in the states and regions. Significant steps will be taken to ensure tourism-related income generated from visitor flows into protected areas is reinvested in these special areas. Action will be taken to address negative impacts already occurring in high visitation sites, and guard against unacceptable change to destinations of emerging visitor interest. While recognizing the difficult conditions under which PAs are often managed at the site-level, investments will be made to build the human resource and management capacity of PA staff and offices, and engage those living in around protected areas in projects and programs to reduce dependency upon unsustainable practices. GOM will give special attention to creating a foundation and framework for innovative public-private partnerships that deliver benefits and multiple win-wins to as wide a selection of stakeholders as possible. Where tourism activity is associated with risks and unpredictable events, steps will be taken to mitigate those risks through crisis response plans and procedures. At the same time, GOM will work diligently and consistently to uphold the rule of law, and streamline regulatory and enforcement measures to ensure the assets of PAs remain intact for the benefit of future generations.

Part II

Myanmar Ecotourism Policy



Part II

Myanmar Ecotourism Policy

This section prescribes the parameters and core policy prescriptions for Myanmar ecotourism. Lessons learned from practices elsewhere suggest a need to begin by clearly defining what ecotourism means in the Myanmar context. This definition is followed by vision and mission statements setting long- and medium-term goals for Myanmar ecotourism. Ten guiding principles to further direct all projects, plans and business activities are also provided, and are intended to become mantras to guide all stakeholders engaged in Myanmar ecotourism.

Definition

This policy and management strategy is focused upon the tourism and protected areas relationship. To ensure this focus endures, the following definition of Myanmar ecotourism is provided.

In Myanmar, the term ecotourism refers to tourism-related activity in and around its protected areas, that focuses upon management tools, systems and processes to deliver three elements:

- *biodiversity and ecosystems conservation;*
- *education and learning to enable hosts and visitors to understand and engage with management approaches to protect and conserve the natural and cultural assets of these areas; and*
- *economic and social benefits to communities in and around protected areas to (a) reduce and eliminate unsustainable practices, and (b) engage them in collaborative approaches to protected area management.*

Vision

Consistent with the terminology of the vision of the Responsible Tourism Policy and Tourism Master Plan, and re-emphasizing the focus upon collaborative approaches to PA management and community wellbeing, the Ecotourism Vision states:

"We intend to use ecotourism as a driving force to strengthen the management of Myanmar's expanding protected area network. Our aim is to engage all stakeholders to implement ecotourism policies, business models and management approaches that protect the unique ecosystems of our country, and celebrate indigenous groups that have made these special areas their home."

Mission

Taking its lead from the vision, the following mission statement further clarifies the intent to carefully plan and manage tourism in and around Myanmar's protected areas. Along with the definition, vision and guiding principles, the mission statement will be used in marketing and branding materials to communicate the foundations of the policy to the broadest possible audience.

By 2020 Myanmar will establish a diversity of quality ecotourism products and services. Targeted towards domestic and international markets, these experiences will raise an international awareness of Myanmar's extraordinary wealth of diverse ecosystems – from the dense forests and lofty peaks of the Eastern Himalayas to the rich marine life of the Myeik Archipelago. An Ecotourism Partnerships Framework will be developed to determine where and when visitor services are needed in and around protected areas. This framework will guide decisions related to the form, scale and management systems of business services that are appropriate to site conditions, and that simultaneously support and part-finance protected area objectives. To achieve our vision, selected protected areas with special assets and high visitor interest will serve as models to test new approaches and develop good practices that can be replicated throughout the country.

Guiding Principles

To achieve the vision and mission, ecotourism programmes, projects and activities will support and align with 10 guiding principles. These guiding principles are designed to raise awareness of key messages among all stakeholders, and to ensure Myanmar ecotourism delivers net benefits to protected areas. The 10 guiding principles for Myanmar ecotourism are to:

- align with protected area objectives and management plans to ensure resource conservation is the number one priority;
- support and respect zoning systems that restrict visitor use of core areas to conserve key species and habitats;
- increase awareness among all stakeholders of the value and benefits of protected area networks, especially with regard to climate change mitigation;
- form destination management organizations to embed ecotourism plans in district and state/region planning, and develop synergies with the UN 2015 Millennium Development Goals and post-2015 Development Agenda;
- leverage cultural and spiritual assets and values in interpretation plans to engender respect and responsible use;
- promote responsible business models that wherever possible engage and benefit local people, reduce over-harvesting of natural assets and deliver conservation benefits;
- provide income sources to sustain and protect Myanmar's protected area network;
- use baseline data and monitoring programmes to assess and minimise negative impacts on nature, culture and host communities;
- attract world-class investments, promote innovative architecture and infrastructure that harmonize with nature and cultural landscapes, and minimize energy consumption; and
- provide models of good practices to help protect natural and cultural assets outside of national protected areas.

In carrying this policy and strategy forward to implementation, and while encouraging the many potential benefits of ecotourism, GOM acknowledges that a range of negative impacts can and will occur. The review of tourism and conservation activity in and around the 21 designated ecotourism sites, for example, identified significant problems in six PAs including poor waste management, short-comings with regard to transparency, and weaknesses with regard to stakeholder coordination. In setting priorities to improve current practices and meet good governance targets, GOM will work with all stakeholders to apply national, regional and global good management practices. By diligently adhering to the guiding principles, and following other criteria laid out in the Responsible Tourism Policy and Tourism Master Plan, the intent is to minimize negative impacts and ensure the net benefits and overall outcomes of Myanmar Ecotourism are overwhelmingly positive.

GOM also recognizes the development of ecotourism in and around protected areas is a step-by-step process. In the first instance comprehensive and inclusive conservation management plans for priority PAs will be prepared and, once these are approved, detailed ecotourism management plans supporting the conservation objectives will be designed. Given ground realities and resource constraints¹⁰, GOM acknowledges it is not possible to simultaneously and sequentially prepare conservation and ecotourism management plans for all designated PAs at the same time. Decisions as to which PAs are prioritized for detailed management planning depend upon a range of factors including issues reviewed in Part I such as accessibility, current visitor numbers, community interests, the status of sector-related impacts, and safety and security issues. Based upon these and related issues including market interest, Table 6 identifies first and second tier priorities for preparing conservation management and ecotourism plans. While acknowledging that market forces including private sector¹¹ and development partner interests also influence where and how resources are allocated, GOM will work with all stakeholders to ensure management plans for each of the first priority PAs are in place by 2020. Recognizing that more than three million people reside in

¹⁰ including a lack of visitors and little if any tourism activity in a number of designated PAs

¹¹ With regard to private sector interest in the 21 designated PAs, consultations and a questionnaire survey of 29 tour operators, accommodation providers and tour guides confirms high interest in the ASEAN Heritage plus Kyiakhtiyo, Lawkanandar and Popa Mountain. It also reveals that most respondents have very limited knowledge of a number of the PAs including Chattrin, Wetthikah and Hukaung Valley.

the townships embraced by these 10 PAs, the development of ecotourism in around these PAs will strive to deliver social, environmental and economic benefits to the widest possible percentage of this population. Where market interest is high and technical resources available, efforts will also be taken to prepare management plans for additional sites.

Table 6: First and Second Tier Priorities for Preparing Conservation Management Plans and Supporting Ecotourism Plans

First Priority	Alaungdaw Kathapa; Hlawga; Hkakaborazi; Indawgyi; Inlay; Kyiakhtiyo; Lampi; Meinmahla Kyun; Moeyungyi; Natmataung
Second Priority	Chatthin; Hponkanrazi; Hukaung; Lawkanandar; Myang Hay Wun; Panlaung and Pyadalin Cave; Phokyar; Popa Mountain; Shwesettaw; Thamihla Kyun; Wetthikan

In recognising the importance of promoting sustainable development in contrasting ecosystems from the Himalayas to tropical islands, PAs embracing each of Myanmar's major landscapes are included in the first priority sites. GOM acknowledges that (i) site-specific approaches to address the diverse and complex challenges of these contrasting ecosystems are required; and, (ii) partnerships and synergies with neighbouring countries and development partners will greatly assist in setting out best practice approaches and solutions to the development challenges of these areas.

Focusing upon Myanmar's mountain ecosystems, GOM recognises ecotourism development must be supportive off fragile mountain livelihoods and sensitive towards climate change and water-energy-food agendas shaping these environments. In addressing these issues, GOM will look to practices applied by its Himalayan neighbours and partners to help define ecotourism models and approaches best suited to the unique qualities and challenges of these critical environments. Where possible, GOM will engage with trans-boundary programs to promote regional ecotourism growth and learning.

Similarly, in terms of coastal, marine and wetland environments, for example, GOM will look to models of global best practice to design and deploy ecotourism approaches tailored to the specific conditions of these ecosystems. Wherever possible ecotourism activity will strengthen localized supply chains that promote biodiversity conservation and support local communities. In active pursuit of these goals, and to accelerate learning opportunities, GOM will seek to leverage support through participation in global initiatives such as the RAMSAR, World Heritage and Man and the Biosphere programs.

Recognizing that ecotourism is receiving growing attention within ASEAN¹², that visa-free travel from member states is gaining momentum and that Malaysia is leading the development of an ASEAN Ecotourism Strategy, GOM will also engage with its ASEAN partners to learn from, and promote, good ecotourism practices throughout the ASEAN region. In this regard special attention is given to leveraging the status and role of ASEAN Heritage Parks in promoting national and regional good practices.

¹² Malaysia, Indonesia, the Philippines, Thailand, Lao PDR and Cambodia have each developed ecotourism policies and guidelines

Part III

Management Strategy

2015-2025



Part III

Management Strategy 2015-2025

The following five-year management strategy sets out six strategic programs and series of key objectives to implement the core policy objectives laid out in Part II. The six strategic programs are to: strengthen institutional arrangements; strengthen ecotourism planning in and around protected areas; engage local communities; invest in infrastructure and responsible business models; strengthen research and monitoring frameworks; and, strengthen marketing and interpretation. Among other key GOM policies and plans, the six strategic programs align with the National Comprehensive Development Plan, the Myanmar Tourism Master Plan and the National Forest Master Plan.

Figure 4 summarizes the strategic programs and their key objectives. As with the Myanmar Tourism Master Plan, while each program and set of objectives are presented as separate pillars, they are interconnected and should be viewed as an integrated set of actions that require strong coordination in timing and implementation. Moreover, the seven cross-cutting themes of the Master Plan equally apply and will be mainstreamed in the implementation of all programs.¹³

Figure 4: Strategic Programs and Key Objectives

1. Strengthen Institutional Arrangements	2. Strengthen Ecotourism Planning in and Around Protected Areas	3. Engage Local Communities	4. Invest in Infrastructure and Responsible Business Models	5. Strengthen Research and Monitoring Frameworks	6. Strengthen Marketing and Interpretation
1.1 Develop an ecotourism planning and management framework	2.1 Build human resource capacity in ecotourism planning and management	3.1 Raise community awareness of ecotourism and protected area issues and opportunities	4.1 Improve infrastructure in and around PAs	5.1 Deepen knowledge of the tourism and PA relationship	6.1 Raise national awareness of Myanmar ecotourism
1.2 Strengthen the Legal and Regulatory Environment for Ecotourism	2.2 Design Ecotourism Management Plans for Protected Areas	3.2 Promote business opportunities for PA communities	4.2 Promote innovative business models for PAs		6.2 Develop and align a Myanmar ecotourism marketing plan with the broader tourism marketing strategy
1.3 Establish an Ecotourism Partnerships Framework		3.3 Build private sector knowledge of good practices in engaging PA communities	4.3 Promote responsible practices in elephant tourism		

The following sections describe the working areas of the six strategic programs that will carry this policy forward to implementation. Initial summary descriptions of program priorities and key objectives are followed by tables setting out activities to be implemented under each program. Taking a similar layout to the Master Plan, time frames for implementation are proposed together with stakeholders to be engaged (with the lead agency highlighted in bold) and performance indicators. Activities with the symbol (§) appearing in the stakeholder column are indicative of interventions likely to require technical or other forms of development partner assistance. Estimates of the costs required to implement each set of activities over the five years are also included. More detailed financial planning is required to determine costs per year and specific action, and produce more accurate budget lines.

¹³ The seven themes relate to the promotion of gender equity, environmental sustainability, partnerships, innovative financing, regional cooperation, ensuring access for disabled people, and consultation and participation. Please refer to page 32 of the Myanmar Tourism Master Plan for further details.

1. Strengthen Institutional Arrangements

Tourism planning and management frameworks typically embrace a wide diversity of actors including government, private sector, civil society, NGOs, development partners, local community stakeholders as well as the tourists themselves. Strategic Program 1 of the Myanmar Tourism Master Plan includes five key objectives and 21 activities to strengthen this planning and management (institutional) environment, which are also wholly relevant and applicable to the implementation of this Ecotourism Policy and Strategy. This includes, for example, actions being implemented, such as the creation of the Tourism Development Central Committee, the positioning of tourism focal points within key ministries, strengthening of MTF associations and developing systems to collect and manage tourist user fees, as well as those yet to be implemented including the creation of tourism planning committees in the states/regions and the strengthening of tourism information systems and metrics.

Against the background and context of the Master Plan, the Myanmar Ecotourism Management Strategy advocates additional key objectives and activities to strengthen institutional arrangements specific to the ecotourism and protected areas agenda.

Key Objective 1.1

Develop an Ecotourism Planning and Management Framework

Building on the structure of MOECAP's Ecotourism Steering and Working Committees, and functioning as a subcommittee of the Tourism Development Central Committee, an Ecotourism Working Group will be established as a sub-committee of the TDCC at the national level. This Working Group will meet twice per year, be co-chaired by MOHT and MOECAP, and have representation from key government ministries, state/region government representatives and the private sector. The Working Group will assume responsibility for carrying forward specific activities to strengthen the ecotourism and PA planning and management framework, as well as overseeing the overall implementation of this policy and strategy.

Key Objective 1.2

Strengthen the Legal and Regulatory Environment for Ecotourism

Measures to strengthen the legal and regulatory environment for ecotourism and PAs include an assessment of the current Protection of Wildlife and Protected Areas Law, and the rules relating to this Law. The assessment will identify steps to deliver a clearer legal and regulatory basis for ecotourism activity in PAs, especially with regard to rules and procedures for developing and managing ecotourism-related businesses in PAs, and the creation of an Ecotourism Partnerships Framework for PAs (see Key Objective 1.3). Measures will also be introduced to vet and license tour operators and guides carrying out business activities in PAs, as well as actions to clarify permissions and procedures needed to visit PAs.

Key Objective 1.3

Establish an Ecotourism Partnerships Framework

As referenced in the mission statement, the design and implementation of an Ecotourism Partnerships Framework (EPF) is of central importance to the design and successful delivery of the Myanmar Ecotourism Policy and Management Strategy. The EPF will set out a legal, organizational and funding framework to oversee the operation of ecotourism businesses in protected areas¹⁴. MOECAP's capacity to determine the form, type and scale of ecotourism businesses suited to protected areas will be strengthened and systems implemented to ensure diligent and transparent screening of business proposals. Core processes will be set in place to plan for, contract and monitor a variety of ecotourism-related businesses in PAs including, for example, ecolodges, restaurants, tour operations, transport provision and guiding services.

¹⁴ These may include public-public, public-private, public-community and public-community-NGO partnerships

Activities for Implementation

Strategic Program 1: Strengthen Institutional Arrangements

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 1.1 Develop an Ecotourism Planning and Management Framework			\$1,940,000
1.1.1 Establish a national level Ecotourism Working Group as a sub-committee to the TDCC: propose the creation of the Ecotourism Working Group as a sub-committee to the Tourism Development Central Committee; review mandate and working practices of similar groups in other countries; identify key ministries, states/regional government and private sector association representatives to be appointed to the Working Group; prepare mandate and operational process to establish the Working Group; convene six-monthly meetings; conduct a skills and knowledge audit of Working Group members; identify knowledge gaps and training needs; establish a learning program to impart ecotourism and PA knowledge to the Working Group members.	TDCC, MOHT, MOECAP, MONPED, MOLF, MTF	2015	\$100,000 Ecotourism Working Group approved by TDCC; members appointed; learning programs delivered.
1.1.2 Organize high-level good practices and ecotourism PA study tours for policy makers and technical staff: identify key central, state/region and district government departments needed to create an enabling environment for Myanmar ecotourism; identify key government officials to benefit from study tour training programs; conduct a skills and knowledge audit department members; identify knowledge gaps and training needs; design and deliver study tour training programs.	MOECAP, MOHT, Attorney General's Office, MOF, MONPED (\$)	2015-2016	\$250,000 At least three study tour training programmes delivered.
1.1.3 Establish PA Ecotourism Committees: review mandate and working practices of similar groups in other countries; identify priority PAs where committees are needed; identify public, private, civil society and development partner representatives to be appointed to the committees; prepare mandate and operational processes to establish the committees; ensure committees liaise with DMOs as appropriate; develop agendas and convene committee meetings; conduct a skills and knowledge audit of committee members; identify knowledge gaps and training needs; coordinate between groups and establish a learning program to impart ecotourism and PA knowledge to committee members.	MOECAP, MOHT, MONPED, MOLF, MTF (\$)	2015	\$200,000 At least 10 PA Ecotourism Working Groups established; learning programs delivered.
1.1.4 Convene six-monthly meetings between priority PA wardens and MTF: jointly identify priority PAs where initiatives can be started to develop and/or improve ecotourism management; develop agenda for discussion and action; convene six-monthly meetings with minutes and summary reports; implement agreed actions between meetings; embrace additional PAs to expand good practices to, and progress product development in, other sites.	MOHT, MOECAP, MTF (\$)	2015 - 2020	\$100,000 At least 10 PA wardens and 20 MTF/private sector actors regularly participating in meetings by end of 2016; at least 9 PA warden and MTF meetings convened before end of 2020.
1.1.5 Prepare a training needs assessment to strengthen ecotourism and PA institutional arrangements: establish a sub-committee under the national Ecotourism Working Group to focus upon ecotourism and PA human resource and training requirements; prepare a terms of reference for the assessment; liaise and coordinate with wider tourism HRD training needs assessment as appropriate; undertake the assessment and based upon the results (and outcomes of study tours noted above), design training and capacity building program.	MOHT, MOECAP, MTF (\$)	2016	\$1,000,000 Assessment completed; training programs designed and delivered.
1.1.6 Convene meetings at the national level and in key states/regions to explain the policy and strategy: identify key ministry offices and focal points as well as states/regions of fundamental importance to the strategy's implementation; liaise with other ministries and state/regional governments to identify public, private and civil society representatives to attend meetings; convene meetings.	MOHT, MOECAP, MTF	2015-2016	\$150,000 At least six meetings convened in states/regions by end of June
1.1.7 Communicate crisis and emergency response plans for high risk PAs to the private sector: disseminate guidelines and procedures for emergency evacuations related to natural disasters and emergency health conditions in high risk PAs to MTF associations at all levels; deliver trainings to front-line staff from the public and private sectors; conduct ad-hoc simulations in high risk PAs.	MOSW; MOH, MOHT, MOECAP, MTF, state/regional governments	2016	\$100,000 Evacuation procedures disseminated to private sector.
1.1.8 Engage corporates in the tourism and PA agenda: identify key areas and specific actions with potential for corporate sponsorship (interpretation, education programs, visitor centres and MSME programs for example); convene workshops and one-to-one meetings with corporates as appropriate; invite corporates to conferences as appropriate.	MOHT, MOECAP(\$)	2015-2016	\$40,000 CSR agreement letters signed.

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 1.2 Strengthen the legal and regulatory environment for ecotourism and PAs			\$750,000
1.2.1 Review and assess relevant laws: develop terms of reference for an assessment of the Protection of Wildlife and Protected Areas Law, its rules and related laws; appoint consultant(s) to assist and consult widely with key stakeholders including government departments, private sector, and civil society to identify gaps and any inconsistencies between current laws, related provisions and rules; prepare and approve amendments as appropriate; widely disseminate the revised law.	MOECAF, MOHT, MTF (\$)	2015-2016	\$150,000 Amended Protection of Wildlife and Protected Areas Law disseminated in each state/region.
1.2.2 Publish procedures for permission for visitors to visit PAs: review, clarify and document procedures for national and international visitors to visit each of the PAs designated for ecotourism; create a website/web pages setting out laws, rules, regulations and permissions relating to PAs, with key documents and procedures available for download.	MOECAF, MOLE, MTF, Attorney General's Office	2015-2016	\$50,000 Website/web pages established; hard copies of key documents made available for download.
1.2.3 Establish a licensing system for tour operators operating in PAs: review licensing systems developed in other countries; identify potential criteria and processes for developing the license system; convene workshops to discuss and agree criteria with the private sector; define roles and responsibilities for implementing the licensing system; obtain relevant approvals for and implement the licensing system.	MOHT, MOECAF, MTF (\$)	2017	\$200,000 Licensing system deployed.
1.2.4 Develop tour guide competencies in ecotourism and PAs: research and design guide-training modules on Myanmar's PAs and conservation-related issues; align with ASEAN standards; train trainers in the delivery of the modules; deliver trainings; determine the need for a vetting/licensing system for PA tour guides; review licensing systems developed in other countries; identify potential criteria and processes for developing the license system; convene workshops to discuss and agree criteria with the private sector; define roles and responsibilities for implementing the licensing system; obtain relevant approvals for and implement the licensing system.	MOHT, MOECAF, MTF (\$)	2017	\$250,000 Ecotourism and PA tour guide modules developed; tour trainings undertaken; licensing system deployed.
1.2.5 Develop visitor wildlife guidelines: assess and prioritize the need for guidelines to encourage responsible interaction between visitors and wildlife (for example, dolphins, turtles, monkeys, crocodiles etc.); review similar guidelines used in other countries; draft guidelines suited to Myanmar context and engage illustrator to help visualise; present and discuss guidelines with private sector; amend as appropriate; publish and disseminate to target audiences through pamphlets, posters, website downloads etc.	MOECAF, MTF, MOHT	2018	\$100,000 Visitor and wildlife interaction guidelines produced and disseminated.
Key Objective 1.3 Establish an Ecotourism Partnerships Framework			\$700,000
1.3.1 Strengthen organizational capacity: review processes and organizations involved in developing ecotourism agreements; assess staffing and skills requirements for planning, contracting and monitoring requirements; identify training needs and implement trainings.	MOECAF, MOHT, MIC (\$)	2015-2016	\$200,000 Organisational requirements defined; training needs identified; trainings delivered.
1.3.2 Develop a funding framework for PA tourism services: review funding framework for PAs in general, and tourism-related income-generating activities; identify potential funding models based upon regional and international good practices; design funding frameworks and present to GOM for consideration and approval.	MOECAF, MOFR (\$)	2015-2016	\$150,000 Funding frameworks designed and approved; increased budgets disseminated.
1.3.3 Develop and test tourism services planning in target PAs: review conservation management plans for target PAs together with current and potential tourism services; identify specific tourism products/services with market appeal; conduct market and financial analysis for most promising business opportunities.	MOECAF, MOHT (\$)	2015-2017	\$150,000 Tourism services planning systems developed and operational.
1.3.4 Review tendering and contracting processes for tourism services: review existing contracts, contracting and tendering systems; compare with contracts, contracting and tendering systems applied as good practice in other countries; revise and adjust domestic systems as needed; test tendering and contracting processes for tourism products/services identified in activity 1.3.3.	MOECAF, MOHT, MONPED, MIC (\$)	2015-2018	\$200,000 Robust and transparent tendering and contracting systems deployed.
Total Costs 2015-2020			\$3,390,000

2. Strengthen Ecotourism Planning in and Around Protected Areas

While a variety of stakeholder coordination, infrastructure and marketing activities are needed beyond the boundaries of PAs, of fundamental importance to the success of this policy and strategy is the design of ecotourism management plans for the PAs themselves. As noted elsewhere this process must begin with the development of conservation management plans for PAs that, among other things, help determine where and when tourism activities are permissible. Where activity is approved, ecotourism management plans will be prepared and PA tourism committees or destination management organizations (DMOs) formed to carry these plans forward to implementation. Two key objectives are laid out under this program.

Key Objective 2.1

Build Human Resource Capacity in Ecotourism Planning and Management

At this present time, Myanmar lacks the human resources with technical skills to prepare ecotourism management plans for PAs. To address this constraint, GOM will ensure steps are taken to build these skill sets to enable plans to be designed and implemented by domestic actors.

Key Objective 2.2

Design Ecotourism Management Plans for Protected Areas

Activities under this objective will draw upon international good practice to design inclusive ecotourism management plans for PAs. Measures will be taken to ensure the process to prepare the first plans are properly documented and shared with all PA managers and other MOECAP and MOHT technical staff in the states and regions.

Given the fundamental significance of this key objective, and the need to promote good practices in the design of ecotourism management plans, the strategic programs below allude to steps and actions that should be part of the formulation process of ecotourism management plans for PAs.

Activities for Implementation

Strategic Program 2: Develop Ecotourism Management Plans

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 2.1 Build Human Resource Capacity in Ecotourism Planning and Management			\$1,355,000
2.1.1 Establish a core ecotourism and PA technical planning team: determine number of staff needed to include in the team and from which government departments; identify skill sets needed by core planning team; conduct a skills and knowledge audit of core team members; identify knowledge gaps and training needs; establish a learning program to impart ecotourism and PA knowledge to core team.	MOECAF, MOHT, MOLF, MTF (\$)	2015	\$250,000 Core team established; training program delivered
2.1.2 Deliver training to key personnel in states/regions: identify priority PAs for developing ecotourism management plans; identify key personnel responsible for the effective implementation of the plans at the PA and state/ regional levels; identify skill sets needed by these personnel; conduct a skills and knowledge audit; identify knowledge gaps and training needs; establish a learning program to impart ecotourism and PA knowledge to key personnel.	MOECAF, MOHT, state/regional governments (\$)	2016-2017	\$1,000,000 Training delivered for personnel of at least five states/regions.
2.1.3 Establish a real and virtual library with ecotourism and PA resources: appoint focal points in MOECAF and MOHT with responsibilities to gather resources (texts on ecotourism, preparing ecotourism plans, specific ecotourism plans, concessions frameworks, etc.); gather resources – join membership organizations as appropriate (TIES, Linked-In groups, etc.); catalogue, according to specific focus, all hard and soft copies, develop database of all personnel to share materials with; determine best methods for sharing information, and share information.	MOECAF, MOHT, MTF	2015-2016	\$25,000 Virtual library established.
2.1.4 Develop ecotourism modules for inclusion academic programs: review ecotourism modules used in undergraduate and post-graduate programs abroad; seek academic partnerships to (i) adapt modules to suit Myanmar context, and (ii) train university staff in ecotourism issues and the delivery of ecotourism modules; include ecotourism modules in diploma, undergraduate and post-graduate university courses.	MOE, MOHT, MOECAF, national universities	2016-2017	\$80,000 Ecotourism modules produced and delivered in academic courses.
Key Objective 2.2 Design Ecotourism Management Plans for Protected Areas			\$1,320,000
2.2.1 Prioritize PAs in need of ecotourism management plans: discuss ecotourism planning and management needs within MOECAF, MOHT, with state-regional governments and with development partners; identify PAs in most urgent need of ecotourism management plans; align these needs and priorities with timing to prepare wider conservation management plans for these PAs; prepare short list of prioritized PAs.	MOECAF, MOHT, MTF, state/regional governments	2015	\$20,000 List of priority PAs approved by MOECAF
2.2.2 Develop ecotourism management plans for PAs: develop terms of reference for ecotourism management plans that align with wider management plans; assemble ecotourism management planning team; undertake field trips as necessary; design and approve consultation process involving local community, district and state/regional and national government as appropriate; develop draft management plans; present and discuss draft plans with stakeholders as appropriate; finalize management plans; share process and plans with target audiences as appropriate (use as training materials).	MOECAF, MOHT, MTF (\$)	2015-2017	\$1,000,000 At least two ecotourism management plans developed in 2015, 2016 and 2017, 2018 and 2019.
2.2.3 Develop national guidelines and regulations for visitor entry fees into PAs: assemble team to undertake develop guidelines and regulations; review PA entry fee and revenue disbursement practices in other countries; review PA entry fee and revenue disbursement practices already adopted in Myanmar; develop draft guidelines and regulations to standardise entry fee collection and disbursement practices across all PAs; convene state/regional consultations to review and amend draft guidelines as appropriate; finalize and disseminate guidelines and regulations to states/regions.	MOHT, MOECAF, MTF, state/ regional governments, attorney general's office, MOF (\$)	2015-2016	\$300,000 Guidelines and regulation on visitor entry fees to PAs designed; guidelines and regulations approved by GOM and distributed to state/ regional governments.
Total Costs 2015-2020			\$2,675,000

3. Engage Local Communities

All of Myanmar's PAs face challenges in terms of communities living in and around these areas being dependent upon PA natural assets to support subsistence livelihoods. In this context, GOM recognizes there is an absolute need to motivate and engage local communities in strategies, programs and activities to achieve conservation goals. It also recognizes the need for alternative livelihood strategies for these communities, as well as alternative energy programs to reduce dependency upon forest assets for cooking and lighting, for example. While ecotourism may offer alternative livelihood potential, opportunities vary considerably between PAs and are subject to a number of factors. Many of these variables have been described above, others include the skill sets, infrastructure and other capital assets of local communities. While communities in Inlay have many years of tourism experience, only recently are they becoming more engaged in industry supply chains. Communities in other PAs have had no engagement and have little if any understanding of opportunities the sector may offer. At the same time, while communities in locations such as Kyaikhtiyo and Alaungdaw Kathapa may be seasonally benefiting from pilgrimage tourism, there is insufficient regard for the environmental consequences of their activity and the integrity of the PA. In this context, GOM will work to ensure local communities, including women, ethnic groups and the poor are fully consulted and properly engaged in transparent conservation and ecotourism planning processes.

Key Objective 3.1

Raise Community Awareness of Ecotourism and Protected Area Issues and Opportunities

A range of measures will be deployed to impart tourism-related knowledge and skills to local entrepreneurs, target audiences and wider destination communities with verified tourism potential. Interventions will be designed to support and facilitate productive partnerships between local communities, PA staff, PA Tourism Committees, destination management organizations, local entrepreneurs and private sector actors beyond PA boundaries.

Key Objective 3.2

Promote Business Opportunities for Protected Area Communities

A review of MSME business activities currently operating in and around priority PAs will be undertaken, and interventions carried forward to support and facilitate business growth and supply chain linkages that reduce dependency on unsustainable use of natural assets in PAs. A particular emphasis will be given to assessing and developing the role of handicrafts in and around protected areas, and to opportunities to develop a handicraft hallmark for products produced in PAs.

Key Objective 3.3

Build Private Sector Knowledge of Good Practice in Engaging Protected Area Communities

Special focus will be given to ensuring tour operators and other investors in ecotourism in and around PAs are aware of the context and livelihood situation of communities living in these areas. Steps needed to embrace communities in collaborative management approaches will be shared with private sector actors, and attention directed to how and where multiple win-wins may be found.

Activities for Implementation

Strategic Program 3: Engage Local Communities

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 3.1 Raise Community Awareness of Ecotourism and Protected Area Issues and Opportunities			\$1,300,000
3.1.1 Develop publication series to engage target audiences: review and shortlist best practice examples of community involvement in ecotourism businesses in PAs; engage story tellers, select images and develop story lines to engage target audiences; test story lines with target communities and private sector for feedback and amendment; develop publications on tour excursions, accommodation, restaurants, tour guiding, transport provision, wildlife viewing, health and hygiene, etc.	MOHT, MOECAP, MTF (\$)	2016-2017	\$200,000 At least five publications produced and distributed to target audiences in at least 10 PAs.
3.1.2 Develop audio-media series to engage target audiences: review and shortlist best practice examples of community involvement in ecotourism businesses in PAs to complement and support publication series; engage audio-media producers and develop story lines to engage target audiences; test story lines with target communities and private sector for feedback and amendment; develop audio-media series on tour excursions, accommodation, restaurants, tour guiding, transport provision, wildlife viewing, health and hygiene, etc. and make available for distribution via podcasts, download from websites and radio broadcast.	MOIN, MOHT, MOECAP, MTF(\$)	2016-2017	\$150,000 At least five audio-media programs produced and disseminated via radio and websites.
3.1.3 Develop pictorial language and hospitality guides: review example publications depicting basic points of communication and hospitality for host-guest interaction from other projects and countries; engage story tellers, select images and develop story lines to engage target audiences; test story lines with target communities and private sector for feedback and amendment; develop 'how to use this guide' text; develop publication(s).	MOHT, MTF (\$)	2016-2017	\$200,000 At least one publication produced and distributed to host communities in at least 10 PAs.
3.1.4 Form ecotourism groups at the site level: identify sites with verified tourism potential where community ecotourism groups can be formed; organize quarterly meetings to present and discuss ecotourism management plans and examples of community-involvement in ecotourism and protected areas (engage tour operators where possible); make learning resource available to the group; identify opportunities for community to carry forward tourism-related activity (for example, starting or improving restaurants, café, retail outlets, handicraft production, tour excursions or clearing rubbish, creating view points or visitor information points, etc.); seek partnership opportunities and encourage the development of action plans with roles and responsibilities.	MOHT, MOECAP, MTF, PA Ecotourism Committees (\$))	2016-2020	\$250,000 At least 10 ecotourism groups formed in at least 10 PAs; at least five partnerships formed with private sector actors.
3.1.5 Organize study tours and workshops for community leaders and entrepreneurs: identify communities with verified tourism potential; identify community-leaders and entrepreneurs with critical roles to play in terms of facilitating tourism-related activity and decision-making; identify knowledge areas needed by these actors; develop learning program to impart ecotourism and PA knowledge to key personnel; deliver study tour and workshops as appropriate.	MOECAP, MOHT, MTF, PA Ecotourism Committees (\$))	2015-2020	\$500,000 At least 8 study tours and workshops organized for target audiences from at least 8 PAs
Key Objective 3.2 Promote Business Opportunities for Protected Area Communities			\$2,050,000
3.2.1 Research tourism-related supply chains in and around PAs: identify and shortlist PAs with established and contrasting tourism-related supply chains; develop terms of reference for detailed study of (i) the size and reach of these supply chains, (ii) their effects on conservation goals, (iii) handicraft businesses with souvenir potential, and (iv) include need for recommendations to expand business growth in line with conservation goals; execute study, develop report and disseminate findings to relevant stakeholders.	MOECAP, MOHT, MTF, MOCOP, MOI, state/regional governments (\$))	2016	\$100,000 Report with recommendations and examples of good practice published and disseminated to target audiences.
3.2.2 Encourage organic farming in and around protected areas: identify PAs with visitor volumes capable of supporting organic farming economies; use seminars and workshops to raise awareness among farmers of (i) laws regarding pesticide and fertilizer use in and around PAs, and (ii) visitor interest in, and market benefits of, organic produce; identify farmers interested to upscale production of organic produce; work with private sector and market chain actors to develop organic farming programs; assess opportunities to introduce organic farm tours for PA visitors with on-site restaurants and interpretation for visitors; implement organic farming programs; consider viability of creating an "organic produce from Myanmar's PAs" brand and hallmark – develop terms of reference for market study if appropriate.	MOECAP, DOA, state/regional governments	2015-2020	\$1,000,000 At least five organic farming programs established by 2018 and ten by 2020.

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
3.2.3 Review opportunities for communities to access financial services: develop terms of reference to review (i) MSME business activity undertaken by households in and around PAs, (ii) needs of these businesses in terms of access to financial services, and, (iii) existing literature profiling MSME access to financial services in Myanmar; execute study and develop report with recommendations to facilitate an enabling business environment for MSME in and around PAs, and profiling examples of good practices; produce summary report suitable for dissemination to target communities.	MOECAF, MOHT, MTF, MOCOP, MOI, state/regional governments (\$)	2016	\$150,000 Report with recommendations and examples of good practice published and disseminated to target audiences.
3.2.4 Establish challenge fund to finance business growth: within the context and findings of the studies above (activity 3.2.1 and 3.2.2), review related challenge funds for MSMEs; if appropriate, identify development partner or corporate sponsor(s) and determine the criteria, conditions, guidelines and rules for an ecotourism-related challenge fund for PA communities; publicize and launch the challenge fund.	MOECAF, MOHT, MTF, MOCOP, MOI (\$)	2017	\$750,000 Challenge fund established with at least five grants awarded.
3.2.5 Develop Myanmar PA handicraft hallmark for products produced in PAs: review global good practices in developing hallmarks for PA handicrafts; based upon findings from activity 3.2.1, develop terms of reference to assess potential for developing Myanmar PA hallmark for handicrafts produced in PAs, with recommendations for further action.	MOECAF, MOCOP, MOI, MTF/MSSA	2016-2017	\$50,000 Myanmar PA handicraft hallmark established by 2020.
Key Objective 3.3 Build Private Sector Knowledge of Good Practice in Engaging Protected Area Communities			\$280,000
3.3.1 Develop guidelines for private sector engagement with PA communities: review national, regional and global good and bad practice examples of ecotourism businesses engaging and partnering with PA communities; in the context of the community involvement in tourism policy develop guidelines for businesses to engage with PA communities and include specific examples of good and bad practices; convene workshop to present and discuss proposed coverage of the guidelines as a publication; finalize, publish and disseminate report to target communities.	MOHT, MOECAF, MTF, state/regional governments (\$)	2016	\$200,000 Guidelines developed, published and disseminated to target communities.
3.3.2 Raise industry awareness of good practices with PA communities: identify good practice examples of businesses engaging with PA communities; request business leaders to prepare short presentations covering good practice processes; include presentations with Q&A discussion in PA warden and MTF six-monthly meetings (see activity 1.1.4); develop on-line publication covering contrasting examples for circulation to target audiences.	MOHT, MOECAF, MTF (\$)	2016-2018	\$80,000 At least five presentations made at PA warden and MTF meetings by end of 2016; publication produced and disseminated to target audiences by end of 2018.
Total Costs 2015-2020			\$3,080,000

4. Invest in Infrastructure and Responsible Business Models

From a tourism perspective, GOM recognizes the importance of developing quality infrastructure to: (i) facilitate inclusive socioeconomic growth; (ii) encourage visitor movements around the country and to PAs; and (iii) catalyse private investment in tourism superstructure. Needs and priorities identified in this policy and strategy will feed into wider GOM national and state/regional-planning processes to determine where infrastructure investments are required, and ensure diligence in terms of EIA and SIA procedures to preserve the integrity and heritage values of PAs.

Besides investments in infrastructure projects, GOM will create an enabling environment for innovative partnerships that strongly align with the Policy's Guiding Principles. Special focus will be given to piloting media savvy business models with demonstrable linkages to local communities and conservation objectives. Attention will also be directed towards responsible practices in elephant tourism.

Key Objective 4.1

Improve Infrastructure in and around Protected Areas

The Ecotourism Working Group under the TDCC will coordinate with state/regional governments to initiate feasibility studies for infrastructure to facilitate the growth of Myanmar ecotourism. Attention will be given to transport, waste management, energy and telecommunications infrastructure that deliver overall gains for conservation management objectives, that align with wider state/regional destination management plans, and comply with EIA and SIA laws and procedures.

Key Objective 4.2

Promote Innovative Business Models for Protected Areas

GOM will specifically encourage investment in innovative partnerships that support conservation objectives, deliver socioeconomic benefits to local communities and raise national awareness of conservation issues and agendas.

Key Objective 4.3

Promote Responsible Practice in Elephant Tourism

While acknowledging GOM is in the process of formulating a National Elephant Action Plan that will include recommendations for elephant tourism, this policy and strategy advocates a number measures to ensure responsible practice in elephant tourism including: eliminating the practice of performing elephants; a licensing system for elephants used in elephant tourism; a licensing system for mahouts working in elephant tourism; and, do's and don'ts for elephant tourists.

Activities For Implementation

Strategic Program 4: Invest In Infrastructure And Responsible Business Models

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 4.1 Improve Infrastructure in and around Protected Areas			\$550,000
4.1.1 Improve access to and around PAs: identify access constraints impeding development of ecotourism in and around priority PAs; consult with private sector to prioritize improvements needed to promote ecotourism activity; identify roadways with high scenic value and agree measure to conserve their touristic value; discuss needs and priorities with state/regional governments; identify timelines for development and integrate with wider planning processes including conservation and ecotourism management plans.	MOECA, MOHT, MOT, MOCON, MTF (\$)	2015-2020	\$200,000 Access and road planning considerations fully addressed in PA management plans.
4.1.2 Provide telecommunications and internet access for all PAs: identify priority computing/IT and telecommunications infrastructure needs and costs for first and second priority PAs; identify cost savings and management efficiencies gained by installation of telecommunications (focusing upon species protection, conservation management and ecotourism goals); identify clear businesses and conservation management cases, and lobby state/regional governments and corporates for infrastructure budgets; identify timelines for development and embrace in conservation and ecotourism management plans.	MOECA, MOHT, MOCI, MTF	2015-2020	\$100,000 PA staff, local businesses and tourists have access to efficient and reliable telecommunication services in PAs.
4.1.3 Improve infrastructure in and around PAs: identify critical infrastructure needs and costs to deliver conservation gains for PAs on a site by site basis (water and energy supply, waste management); quantify conservation gains from installation of infrastructure; lobby state/regional and national governments for infrastructure budgets; identify timelines for development and embrace in conservation and ecotourism management plans.	MOECA, MOCON, MOEP (\$)	2015-2020	\$250,000 At least five investment projects that deliver conservation gains approved by 2020.
Key Objective 4.2 Promote Innovative Business Models for Protected Areas			\$1,600,000
4.2.1 Develop wildlife adventure parks close to urban centres: review regional practices, business and interpretation models of wildlife adventure parks close to urban areas (for example, www.cws.org.au); organize high-level study tours to good practice models; invite good practice managers to Myanmar for study tours and information exchange; seek development partner assistance to develop lease agreements for wildlife adventure parks.	MOECA, MONPED, MOHT, MTF (\$)	2016	\$500,000 At least two high-level study tours to wildlife adventure parks by end of 2016; at least one wildlife adventure park lease agreement signed by 2020.
4.2.2 Develop branded visitor and interpretation centres for priority PAs: review interpretation needs for visitor centres in or close to PAs; review examples of good regional and international practice for PA interpretation centres; develop terms of reference for branding and themed interpretation concept celebrating Myanmar biodiversity and ecosystems; identify possible (social) business opportunities for branded and themed interpretation centres with cafes/restaurants; develop lease agreements as appropriate; assess potential to partner cafes/restaurants in urban areas; seek corporate investor for PPP business models.	MOECA, MTF, MOHT (\$)	2017-2020	\$500,000 At least five high quality interpretation centres established in or close to priority PAs.
4.2.3 Develop ecolodges in or close to priority PAs: review good practices in developing ecolodges in and around PAs; in the context of preparing conservation and ecotourism management plans for PAs, review and identify accommodation needs in and around protected areas; conduct market and financial analysis; deploy prospectus, tendering and contracting systems in line with Key Objective 1.3.	MOECA, MOHT, MTF, state/regional governments (\$)	2015-2020	\$500,000 At least eight ecolodges operational in and around priority PAs by 2020.
4.2.4 Develop high-quality branded merchandise celebrating Myanmar's biodiversity and ecosystems: review regional and global examples of high-quality merchandise profiling exotic, cute, cuddly, wild, ugly examples of Myanmar's diverse biodiversity (t-shirts, cuddly toys, t-towels, sweat-shirts, posters, hats, etc.); seek corporate partner to develop and distribute merchandise with percentage of sales revenue going to PA management costs or to directly finance PA projects and programmes.	MOECA, MCCI	2017-2020	\$100,000 High quality merchandise agreement signed with corporate partner; merchandise produced.

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 4.3 Promote Responsible Practice in Elephant Tourism			\$500,000
4.3.1 Develop a licensing system for elephants employed in tourism: review licensing systems deployed to regulate elephant tourism in other countries, including Association of British Travel Agents “Elephants in Captive Environments” manual; design tourism-related elephant licensing system suited to Myanmar context; develop laws, rules, regulations and processes; convene stakeholder workshop(s) to seek feedback on proposed laws, rules and regulations; amend draft laws, rules, regulations and processes as appropriate; seek cabinet approval for laws, rules and regulations; disseminate laws rules and regulations, including elephant tourism codes of conduct for tourism businesses.	MOECAF, MOHT, MTF, MOI (\$)	2015-2016	\$150,000 Licensing system for elephants employed in tourism deployed.
4.3.2 Develop do's and don'ts for elephant tourists: review international guidelines for elephants used in tourism, including the Association of British Travel Agents “Elephants in Captive Environments” manual; within the context of the conclusions and outputs of the Myanmar National Elephant Action Plan, draft do's and don'ts for elephant tourists; employ illustrator to help visualize; present and discuss draft do's and don'ts to private sector; amend as appropriate; publish and disseminate as posters, booklets/pamphlets and downloads.	MOECAF, MTF (\$)	2015-2016	\$150,000 Do's and don'ts for elephant tourism published and disseminated.
4.3.3 Regulate mahouts working in elephant tourism: review procedures and training courses for mahouts working in elephant tourism in other countries; develop and deploy licensing system for mahouts working in elephant tourism to suit Myanmar context; design and deliver training courses for mahouts working in elephant tourism.	MOECAF (\$)	2017	\$200,000 Licensing system and training courses for mahouts approved and deployed.
Totals Costs 2015-2020			\$2,650,000

5. Strengthen Research and Monitoring Frameworks

Successful ecotourism and PA management depends upon improved understanding of many issues from species and habitat conditions, to visitor behaviours and supply chain dynamics. Similarly, ecotourism should be viewed as a process where constant attention is directed towards minimizing negative impacts and maximizing benefits. The Ecotourism Working Group will review and prioritise management information needs to better understand the ecotourism and PA relationship. Research partnerships will be formed with a number of national and international institutions, as well as private sector actors, to advance knowledge and understanding of critical impacts and markets, and how they should be managed.

Key Objective 5.1

Deepen Knowledge of the Tourism and Protected Areas Relationship

Attention will be directed towards: (i) systematic gathering of quantitative and qualitative data to profile visitor use of PAs, the types of visitors, reasons for visiting and levels of satisfaction with the visitor experience; (ii) assessments of the environmental, social and economic impacts of tourism activity in and around PAs; (iii) segmented market research to assess the willingness to pay for tourism products and services in and around PAs; and, (iv) developing partnerships to strengthen research and monitoring frameworks.

Activities for Implementation

Strategic Program 5: Strengthen Research And Monitoring Frameworks

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 5.1 Deepen Knowledge of the Tourism and Protected Areas Relationship			\$830,000
5.1.1 Improve collection of PA visitor data: review existing processes to collect visitor data for all designated PAs; identify effective collection systems as well as gaps in data collection; assess practices used elsewhere to collect quantitative and qualitative data, as well as overcome practical and logistical constraints; work with state/regional governments and private sector to develop systems and processes to strengthen data collection; deploy and amend as appropriate data collection methods.	MOECAF, MOHT, MTF, state/ regional governments (\$)	2015-2020	\$200,000 Reliable domestic and international PA visitor data processes established for all designated PAs.
5.1.2 Conduct tourism and protected area research: appoint MOHT and MOECAF focal points with responsibility for coordinating Myanmar Ecotourism research; identify sites and destinations with critical management issues (environmental, economic and social); coordinate with national Ecotourism Working Group to prioritize research and information needs according to national and destination management objectives; set out research priorities on dedicated Myanmar ecotourism website (see activity 6.2.2), with request for research proposals; review proposals, identify research partners and execute research projects.	MOHT, MOECAF, national universities (\$)	2015-2020	\$150,000 Ecotourism and PA research priorities identified and posted on website(s); at least 10 research projects completed with results disseminated by end of 2017.
5.1.3 Expand Myanmar ecotourism research partnerships: develop a combined ministerial MOHT and MOECAF statement articulating (i) the need for diligent in-depth research into critical aspects of the tourism and PA relationship covering environmental, economic and social issues, and (ii) the need for national and international research partnerships to undertake such research; place statement on dedicated Myanmar ecotourism website with name and contact details for MOHT and MOECAF focal points; develop fast-track procedures for vetting and approving research projects (with priority for international partnerships partnered with local institutions).	MOECAF, MOHT, national universities	2015-2020	\$30,000 At least six research partnerships in place by end of 2017.
5.1.4 Review management issues disrupting the ecotourism and PA relationship: identify development issues such as mining, fishing, intensive farming, logging, road-construction and plantation farming that threaten and disrupt the ecotourism and PA relationship; coordinate with national Ecotourism Working Group to prioritize research and information needs to better understand the dynamics involved and strengthen management decision making to deliver conservation benefits; undertake research and gather information; produce and disseminate report.	MOECAF, MOHT, MONPED, state/ regional governments	2015-2020	\$100,000 Myanmar ecotourism highlighted as a development priority for PAs in state/regional planning documents.
5.1.5 Assess visitor willingness to pay for visiting PAs: appoint focal point(s) to review and assess the 'types' of visitors to PAs, their purpose of visit and originating markets; develop questionnaire with quantitative and qualitative aspects to (i) build an understanding of visitor types and markets, (ii) measure levels of satisfaction with visitor experience, (iii) measure willingness to pay for conservation-related aims and objectives, (iv) assess other critical issues as appropriate including opinions on site specific management issues; develop partnerships and processes to collect representative survey samples on an annual basis; deploy questionnaires, gather data and develop annual report.	MOECAF, MOHT, MTF national universities (\$)	2016-2020	\$300,000 Annual reports on willingness to pay and related issues produced.
5.1.6 Assess market interest to expand the number of PAs designated for ecotourism: include agenda item in each six-monthly PA warden and MTF meeting to assess private sector interest to expand the number of PAs designated for ecotourism; develop systems and procedures for private sector to approach MOECAF and national Ecotourism Working Group with proposals to develop new products and services in and around PAs.	MOECAF, MOHT, MTF	2015-2020	\$50,000 Procedures for Ecotourism Working Group to assess market interest in opening new PAs for ecotourism established.
Total Costs 2015-2020			\$830,000

6. Strengthen Marketing and Interpretation

The strategic approach to tourism marketing adopted by the Myanmar Tourism Master Plan is equally applicable to this Ecotourism Policy and Management Strategy. This Policy's special focus upon tourism and protected areas and the Ecotourism Partnerships Framework provide a platform for Myanmar ecotourism to become a distinctive brand and component of the country's tourism product. The success and integrity of the brand will likely receive on-going coverage in national and international media. In this context, a variety of activities will be carried forward to profile and position Myanmar's unique ecotourism assets in the domestic and international market place. Integral to the two key objectives and campaigns advocated below, will be an emphasis upon promoting respect, responsible use and collective action.

Key Objective 6.1

Raise National Awareness of Myanmar Ecotourism

The success of the Myanmar ecotourism brand hinges in part on raising national awareness as to the purpose of PAs and PA networks, and the opportunities and constraints of tourism as a vehicle to strengthen the management of these special areas. In line with the wider Master Plan objective to raise internal awareness of responsible tourism, GOM will use different mediums to deliver a broad national educational campaign to the total population, alongside specific information to target audiences.

Key Objective 6.2

Develop and Align a Myanmar Ecotourism Marketing Plan with the Broader Tourism Marketing Strategy

The Ecotourism Working Group will partner with the Myanmar Marketing Committee to develop a series of activities and actions to position and promote the Myanmar Ecotourism brand to domestic, regional and wider international markets. While recommendations for marketing activities are included in the implementation framework, these are neither exhaustive nor conclusive and activities selected will be carefully aligned and integrated with the wider Myanmar tourism marketing strategy. As with the wider tourism marketing strategy, on-going monitoring of supply, demand and gap characteristics will inform stakeholders of the effectiveness of marketing approaches and allow for adjustments in the delivery of the marketing plan over time.

Activities for Implementation

Strategic Program 6: Strengthen Marketing and Interpretation

Key Objectives and Activities	Lead Agencies	Time Frame	Cost and Performance Indicators
Key Objective 6.1 Raise National Awareness of Myanmar Ecotourism			\$1,200,000
6.1.1 Convene Myanmar International Ecotourism Conference to Launch Ecotourism Policy and Strategy: liaise with development partners to develop conference agenda and work-plan; deploy work-plan; convene conference.	MOHT, MOECAP, MTF, (\$))	2015	\$200,000 International ecotourism conference convened.
6.1.2 Disseminate key 'Myanmar ecotourism' messages to national and target audiences: identify focal points from key ministries to coordinate and deliver national publicity campaign; identify key messages to communicate national and target audiences (including definition, vision, mission and guiding principles); identify mediums of communication; design and implement work plan to deploy key messages.	MOHT, MOECAP, MMC, MOIN, state / regional governments (\$))	2016-2020	\$500,000 Media campaign deployed; promotional materials including key messages disseminated.
6.1.3 Develop 'Friends of Myanmar PAs' social networks and 'Healthy Parks – Health People' campaign: identify key focal points from key ministries to develop social media groups; identify social media groups to form; encourage contacts and network to join social media groups; encourage posting of (i) universal values of PAs, (ii) good visitor and management practices, and (iii) draw attention to bad practices social network can help solve; deliver regular messages and six-monthly newsletters letters to the groups; organize and encourage participation in volunteer events and activities to assist PA managers.	MOECAP, MOHT, MMC, MOIN	2016-2020	\$200,000 Social media groups formed with at least 5,000 people receiving news updates.
6.1.4 Develop school teaching packs and educational materials: identify teachers and schools interested in Myanmar ecotourism; design a series of learning resources based around the natural and cultural resources of PAs, their management objectives, as well as the aims, objectives, opportunities and challenges of developing Myanmar ecotourism for use during site visits and in the classroom; disseminate resources to schools.	MOE, MOECAP, MOHT, PA Ecotourism Committees (\$))	2018-2020	\$300,000 School teaching packs produced; increase in school groups visiting PAs.
6.2.1 Develop a series of promotional materials: identify key messages and story lines for promotional materials; design branded visitor maps and interpretation brochures for priority PAs in Myanmar, English and key languages identified from market research; publish and disseminate promotional materials.	MOHT, MOECAP, MMC (\$))	2016-2020	\$400,000 Promotional materials produced and disseminated.
6.2.2 Develop a comprehensive Myanmar ecotourism website: identify focal points to manage website pages linked to existing MOHT and MOECAP websites; design web pages in Myanmar and English profiling policy and strategy, PA context and ecotourism opportunities, etc.; ensure consistent brand image linked to visitor centres and promotional materials; make promotional materials available for download; include laws, rules, regulations and procedures for permissions to visit PAs as appropriate; include research priorities; launch and maintain website.	MOHT, MOECAP, MMC (\$))	2016-2020	\$200,000 Myanmar ecotourism website created and maintained.
6.2.3 Create a database of respected travel writers, journalists and video bloggers: appoint focal points to manage data-base; identify travel writers, journalists and video-bloggers with strong interest in ecotourism and PAs agenda; provide regular news feeds to data-base list; link with tour operators and accommodation providers to provide invites to PAs to experience new products and services; link trips to tour operators, accommodation providers and potential corporate sponsors.	MMC, MOHT, MOECAP,	2015-2020	\$80,000 Database with at least 200 reputable journalists from 20 countries created; 50 feature articles in quality media produced each year.
6.2.4 Create a database of international tour operators interested in Myanmar ecotourism: appoint focal point to manage data base; design and populate data-base; send six-monthly news feeds reporting developments with Myanmar ecotourism.	MOHT, MMC	2016-2020	\$50,000 Database of international tour operators developed; twice-yearly news feeds deployed.
6.2.5 Establish annual photograph competition: identify at least 10 categories for celebrating different aspects of Myanmar ecotourism; appoint panel of judges; identify competition sponsors; advertise competition domestically and internationally; convene awards ceremony.	MOHT, MOECAP, MMC	2016-2020	\$200,000 Annual photograph competition established.
6.2.6 Establish annual Myanmar ecotourism awards program: identify at least five award categories; align with wider national tourism awards program; appoint panel of judges; identify award sponsors; advertise awards program domestically and internationally; convene awards ceremony.	MOHT, MOECAP, MMC	2016-2020	\$200,000 Annual Myanmar ecotourism awards program established.
Total Costs 2015-2020			\$2,330,000

Part IV

**Implementation,
Monitoring and Budget
Requirements**



Part IV

Implementation, Monitoring and Budget Requirements

Implementation

Overall responsibility for the implementation of the Myanmar Ecotourism Policy and Management Strategy rests with the Tourism Development Central Committee which, among other roles, is mandated to establish and monitor: (i) ecotourism policies to deliver mutual benefits to protected areas; (ii) green tourism activities to harmonize environmental benefits in relation to global climate change; and, (iii) subcommittees as may be required.

In accordance with the TDCC's mandate, and to focus upon carrying programs and activities of the Myanmar Ecotourism Policy and Management Strategy forward to implementation, an Ecotourism Working Group will be formed. The positioning of the Working Group within the context of the Tourism Master Plan's implementation framework is illustrated in Figure 5, which is adapted to reflect current realities and include MOECAF as a key Ministry of central importance to this Policy. By way of explanation to Figure 5, the paragraphs below are adapted from the Tourism Master Plan to reflect current realities and include focused reference to Myanmar Ecotourism-related roles and responsibilities.

Figure 5: Implementation Arrangements: Myanmar Ecotourism Policy

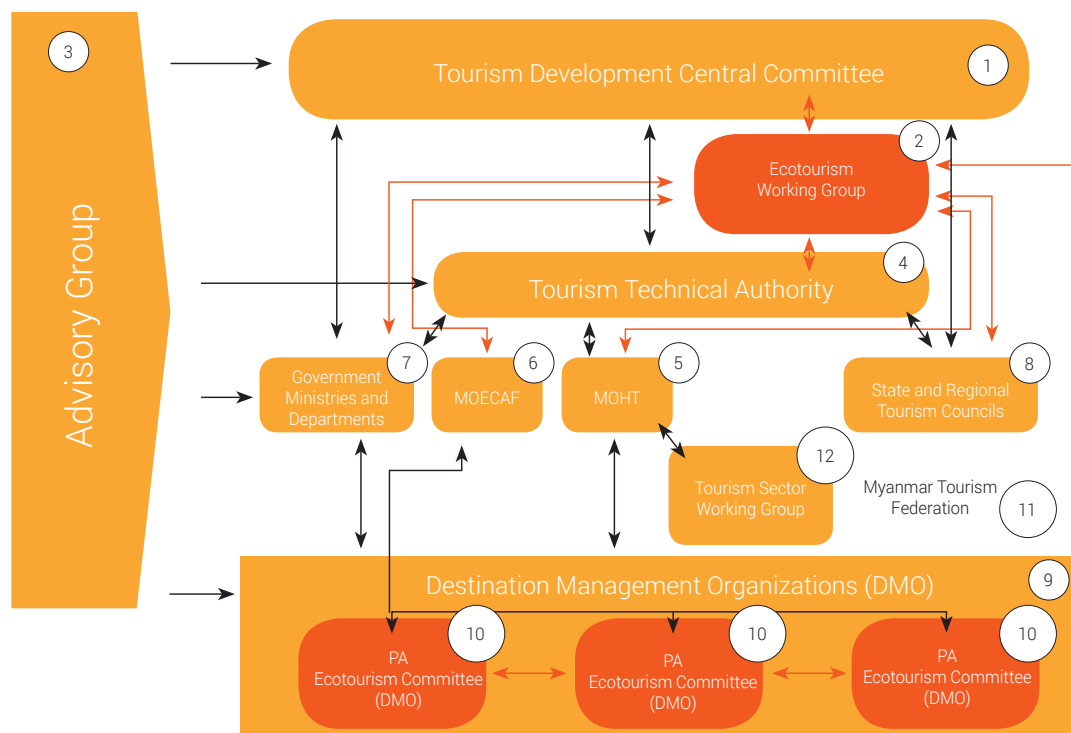


Figure 5 confirms the institutional complexity of tourism planning environments. Arrows indicate the multidirectional flow of information supporting participatory decision-making. While members of the proposed advisory group may engage MOHT and other agencies directly to provide policy advice and project assistance, TDCC also plays a leading role in maintaining relations with development partners. The MTF's overlapping presence on the Tourism Development Central Committee, state and regional tourism councils, and Destination Management Organizations is represented by the transparent triangle. The role and positioning of the Ecotourism Working Group is illustrated in red as a Working Group beneath the TDCC. Protected Area Ecotourism Committees (which can also be interpreted as destination management organisations) are also illustrated in red, along with the arrows indicating the flow of information and communication between the Working Group and other institutional actors. Numbers in the figure refer to the following numbered text paragraphs that explain the roles of key actors involved in implementation of the Master Plan and Ecotourism Policy.

1. The Tourism Development Central Committee

provides leadership and policy guidance to steer the implementation of the Master Plan and the Ecotourism Policy. The Committee:

- meets at least twice per year to review progress in implementing the Master Plan and Ecotourism Policy, and provide guidance on necessary adjustments to the work-plans and operations of ministries, state and regional tourism councils and other actors;
- seek support from development partners for priority projects and activities specified in the Master Plan and Ecotourism Policy; and
- convene ad-hoc meetings to formulate responses to unforeseen events (e.g., emergency situations) that require high-level decision making.

2. An Ecotourism Working Group will be formed under the TDCC.

The Group will:

- develop work programs according to priorities laid out in this policy and strategy, and guidance issued by the TDCC;
- meet at least twice per year and assume responsibility for carrying forward specific activities to develop and strengthen ecotourism planning and management; and
- convene ad-hoc meetings as may be necessary to formulate responses to unforeseen events.

3. The proposed advisory group

will impart strategic intelligence and share knowledge on good practices to support strategic decision making by TDCC. GOM continues to seek international agencies with expertise in tourism (e.g., the World Bank Group, Asian Development Bank [ADB], the United Nations World Tourism Organization [UNWTO], the World Travel and Tourism Council [WTTC], the Pacific Asia Travel Association [PATA], the Global Sustainable Tourism Council [GSTC]), other strategic development partners, and prominent individuals to become members of the advisory group. The proposed advisory group will:

- provide advice and strategic intelligence to the TDCC, TTA, and MOHT on global tourism issues, matters related to priority projects and activities, and issues related to the social and environmental impacts of tourism;
- provide policy advice, technical assistance, and financial support to facilitate implementation of the Master Plan and Ecotourism Policy;
- liaise with international agencies to catalyze additional support to implement the Master Plan and Ecotourism Policy, and enhance knowledge sharing; and
- collectively meet with TDCC at least once annually.

4. The proposed Tourism Technical Authority

will provide TDCC, the Ecotourism Working Group, MOHT, the Myanmar Tourism Federation (MTF), and other agencies with market intelligence, performance data, and information on the social, environmental, and economic impacts on tourism to enable effective decision making and necessary policy reforms. TTA will:

- measure the flows and impacts of tourism activity;
- be staffed mainly by economists, statisticians, information technology specialists, and marketing specialists;
- work closely with public and private sector agencies as well as global and regional tourism agencies (e.g., the Association of Southeast Asian Nations (ASEAN) Secretariat, the Mekong Tourism Coordinating Office, PATA, UNWTO, and WTTC); and

Part IV Implementation, Monitoring and Budget Requirements

- provide quarterly status reports to TDCC, the Ecotourism Working Group, MOHT, MTF, and other appropriate agencies and partners regarding Myanmar's tourism system.

5. The Ministry of Hotels and Tourism

is the primary government agency responsible for the systematic development of Myanmar's hotel and tourism industry. GOM will ensure that MOHT is suitably empowered with the human and financial resources needed to execute the priority projects and activities it will lead. MOHT:

- implements the policies, projects, and programs endorsed by TDCC including, where resources are permitting, activities listed in the Ecotourism Policy implementation tables;
- leads implementation of the majority of priority projects included in the Master Plan and coordinate and liaise on others;
- promotes national and international investment in the tourism sector;
- develops opportunities for wider participation of private entrepreneurs in the tourism industry;
- develops programs to establish Myanmar as a world-renowned destination and ensure sustained international visitor interest in Myanmar;
- organizes workshops, seminars, exhibitions, and training to upgrade the quality and technical skills of the tourism industry;
- creates awareness of best practices for using tourism to create job opportunities and raise living standards; and
- cooperates with ASEAN member countries to enhance regional tourism cooperation.

6. The Ministry of Environmental Conservation and Forestry,

among other responsibilities, is the primary government agency responsible for the planning and management of Myanmar's protected areas. MOECAF:

- designates protected areas, zoological and botanical gardens; and
- implements policies related to the conservation of national protected areas and the protection and study of wildlife together with the habitats of endangered flora and fauna.

Through its Ecotourism Steering Committee, MOECAF also:

- designates protected areas suitable for recreation and ecotourism;
- stipulates conditions under which persons or companies may operate ecotourism-related businesses inside protected areas;
- sets out ecotourism policies for PAs, and in their implementation coordinates with related departments and organizations including the private sector; and
- supervises and monitors activities in PAs to ensure sustainability of practices.

Through its Ecotourism Working Committee, MOECAF also:

- implements ecotourism policies and activities in PAs;
- recommends the designation of PAs as ecotourism sites;
- sets out rules and regulations permitting ecotourism activity in PAs, where approved by higher authorities;
- processes applications for ecotourism activity in PAs;
- issues permits to travel to PAs where approved by higher authorities;
- submits to the Management Committee, the monthly registered data of entries to ecotourism destinations;
- develops income generation strategies for nature conservation;
- administers ecotourism activities in wildlife sanctuaries and botanical gardens;
- coordinates with related departments, domestic and international tourism organizations for the development of ecotourism; and,
- provides guidance and other institutional support to PA ecotourism committees.

7. Government ministries and departments.

Working under the guidance of TDCC, key ministries and departments appoint focal points to assume responsibility for the tourism- and ecotourism-related interventions they lead, and also strengthen coordination across sectors. Government ministries and departments:

- engage with MOHT and TTA to implement tourism-related policies, projects, and programs;
- advise TDCC on key tourism and ecotourism related issues that require attention at the national, state, or regional level; and
- provide appropriate guidance and support to state and regional tourism councils and DMOs including PA ecotourism committees.

8. State and regional tourism councils

will engage in tourism planning and management at the subnational level. The councils will also facilitate the implementation of destination-level projects and activities. Given the lack of public and private tourism experience within the states and regions, the councils will seek support from development partners to strengthen their ability to mainstream tourism planning into local governance structures. State and regional tourism councils will:

- engage with MOHT, TTA, MTF, destination management organizations and other actors to implement tourism-related policies, projects, and activities, as agreed with TDCC;
- report key tourism-related issues arising in states, regions, and destinations to TDCC; and,
- provide appropriate guidance and support to destination management organizations including PA ecotourism committees.

9. Destination Management Organizations

will strengthen tourism planning and management at destinations and sites, operating under the guidance of state and regional governments and MOHT. Destination management organizations will include representation from public, private, and civil society organizations and promote grassroots participation in tourism planning and decision-making. GOM will actively support the engagement of NGOs and development partners to strengthen the capacity of destination management organizations. Destination management organizations will:

- engage with MOHT, TTA, MTF, and other actors to implement tourism-related policies, projects, and activities, as agreed with MOHT and state and regional tourism councils; and
- report tourism-related issues occurring in destinations that require the attention of the TDCC, state and regional tourism councils, and MOHT.

10. PA Ecotourism Committees

play the same role as destination management organizations and have the same composition and responsibilities but focus specifically upon a protected area's ecotourism system. They also engage with MOECAP to implement policies, projects and activities, and are directed by the Myanmar ecotourism guiding principles.

11. The Myanmar Tourism Federation

mobilizes private investment to accelerate development of tourism and related sectors through its membership base and operations of its associations. The MMC and Union of Myanmar Travel Association support national, destination and Myanmar ecotourism marketing and product development, as well as include tourism investment promotion as part of its internal and external marketing activities. MTF:

- promotes private investment in tourism, ecotourism and related sectors that is consistent with the Myanmar Responsible Tourism Policy;
- fosters business linkages between national and international tourism-related enterprises;
- advises MOHT, MOECAP, state and regional tourism councils and DMOs including PA ecotourism committees on the development and implementation of marketing campaigns;
- participates in the implementation of national and subnational marketing campaigns;
- assists in mobilizing financial and technical resources needed to effectively implement marketing activities; and
- closely coordinates with TTA and MOHT, as well as MOECAP on ecotourism-related issues.

Part IV Implementation, Monitoring and Budget Requirements

12. The Tourism Sector Working Group

meets twice per year and is composed of development partners and tourism experts variously supporting the MOHT's mandate and work programs. The TSWG:

- supports the development of tourism as a national priority, and its role toward contributing to economic growth and poverty reduction;
- supports the implementation of the Tourism Master Plan and Ecotourism Policy and Management Strategy;
- ensures tourism and related priorities are considered within strategic planning and policy documents produced by relevant stakeholders including but not limited to GOM and its development partners; and
- helps guide responsible and sustainable tourism development in Myanmar.

Monitoring

MOHT and MOECAP will jointly lead in monitoring the implementation of the Ecotourism Policy and Management Strategy. Working under the TDCC the Ecotourism Working Group will produce an annual report describing progress made against milestones and performance indicators for each activity listed under the strategic programs in the above implementation tables. After the first year of implementation, the Working Group will review and modify performance indicators. The Working Group will be assisted in this task by International Centre for Integrated Mountain Development (ICIMOD) who have already committed funds for this exercise. In 2020, the Ecotourism Working Group will initiate an in-depth review of this Policy and Management Strategy to ensure its continuing relevance, the practicability of the implementation framework and set out a 2020-2025 five year work program. Review processes are important as actual timelines for many activities will inevitably differ from projections herein, underscoring the need for flexible timelines and milestones. GOM will facilitate technical assistance to support the review process and ensure wide distribution of all findings.

Budget Requirements

The Management Strategy's six strategic programs contain 14 key objectives under which 62 sets of activities are grouped. Cost estimates for all activities total \$14,955,000 (Table 7). Additional investments (i) in infrastructure to improve access to and around PAs and (ii) to implement individual ecotourism plans for the 10 priority PAs over the next five years will also be required, and are not included in this Management Strategy. The key objectives and activities identified aim to ensure responsible and inclusive growth of ecotourism activity in and around Myanmar's protected areas.

Table 7: Indicative Cost Estimates of the Myanmar Ecotourism Management Strategy 2015-2020

Strategic Program	Cost Estimates (USD millions)
Strengthen institutional arrangements	3.39
Strengthen ecotourism planning in and around protected areas	2.675
Engage local communities	3.080
Invest in infrastructure and responsible business models	2.65
Strengthen research and monitoring frameworks	0.83
Strengthen marketing and interpretation	2.33
Total	14.955

Abbreviations Used

<i>ADB</i>	–	<i>Asian Development Bank</i>
<i>ASEAN</i>	–	<i>Association of Southeast Asian Nations</i>
<i>BANCA</i>	–	<i>Biodiversity and Nature Conservation Association</i>
<i>CBT</i>	–	<i>Community based tourism</i>
<i>DMO</i>	–	<i>Destination management organization</i>
<i>EIA</i>	–	<i>Environmental impact assessment</i>
<i>EPF</i>	–	<i>Ecotourism Partnerships Framework</i>
<i>ESC</i>	–	<i>Ecotourism Steering Committee</i>
<i>FESR</i>	–	<i>Framework for Economic and Social Reforms</i>
<i>GOM</i>	–	<i>Government of Myanmar</i>
<i>GMS</i>	–	<i>Greater Mekong Subregion</i>
<i>GSTC</i>	–	<i>Global Sustainable Tourism Council</i>
<i>ICIMOD</i>	–	<i>International Centre for Integrated Mountain Development</i>
<i>IUCN</i>	–	<i>International Union for Conservation of Nature</i>
<i>MHA</i>	–	<i>Myanmar Hotelier Association</i>
<i>MMC</i>	–	<i>Myanmar Marketing Committee</i>
<i>MOAI</i>	–	<i>Ministry of Agriculture and Irrigation</i>
<i>MOBA</i>	–	<i>Ministry of Border Affairs</i>
<i>MOC</i>	–	<i>Ministry of Commerce</i>
<i>MOCIT</i>	–	<i>Ministry of Communications and Information Technology</i>
<i>MOCON</i>	–	<i>Ministry of Construction</i>
<i>MOCOP</i>	–	<i>Ministry of Cooperatives</i>
<i>MOCUL</i>	–	<i>Ministry of Culture</i>
<i>MOE</i>	–	<i>Ministry of Education</i>
<i>MOECAF</i>	–	<i>Ministry of Environmental Conservation and Forestry</i>
<i>MOFR</i>	–	<i>Ministry of Finance and Revenue</i>
<i>MOEP</i>	–	<i>Ministry of Electric Power</i>
<i>MOFA</i>	–	<i>Ministry of Foreign Affairs</i>
<i>MOH</i>	–	<i>Ministry of Health</i>
<i>MOHA</i>	–	<i>Ministry of Home Affairs</i>
<i>MOHT</i>	–	<i>Ministry of Hotels and Tourism</i>
<i>MOI</i>	–	<i>Ministry of Industry</i>
<i>MOIN</i>	–	<i>Ministry of Information</i>

<i>MOIP</i>	–	<i>Ministry of Immigration and Population</i>
<i>MONPED</i>	–	<i>Ministry of National Planning and Economic Development</i>
<i>MORA</i>	–	<i>Ministry of Religious Affairs</i>
<i>MORT</i>	–	<i>Ministry of Rail Transport</i>
<i>MOS</i>	–	<i>Ministry of Sports</i>
<i>MOSWRR</i>	–	<i>Ministry of Social Welfare, Relief and Resettlement</i>
<i>MOT</i>	–	<i>Ministry of Transport</i>
<i>MOST</i>	–	<i>Ministry of Science and Technology</i>
<i>MTF</i>	–	<i>Myanmar Tourism Federation</i>
<i>NGO</i>	–	<i>Non governmental organization</i>
<i>PA</i>	–	<i>Protected area</i>
<i>PATA</i>	–	<i>Pacific Asia Travel Association</i>
<i>PPP</i>	–	<i>Public–private partnership</i>
<i>SIA</i>	–	<i>Social impact assessment</i>
<i>TDCC</i>	–	<i>Tourism Development Central Committee</i>
<i>TIES</i>	–	<i>The International Ecotourism Society</i>
<i>TOR</i>	–	<i>Terms of reference</i>
<i>TTA</i>	–	<i>Tourism Technical Authority</i>
<i>UNDP</i>	–	<i>United Nations Development Programme</i>
<i>UNESCO</i>	–	<i>United Nations Educational, Scientific and Cultural Organization</i>
<i>UNWTO</i>	–	<i>United Nations World Tourism Organization</i>
<i>USP</i>	–	<i>Unique selling point</i>
<i>WCS</i>	–	<i>Wildlife Conservation Society</i>
<i>WTTC</i>	–	<i>World Travel and Tourism Council</i>
<i>WWF</i>	–	<i>World Wide Fund for Nature</i>

Appendix 1 PROTECTED AREA CATEGORIES

The following sections describe IUCN Protected Area definitions, management categories and governance types and contrast these with Myanmar's Protected Area Categories.

IUCN defines a protected area as:

A clearly defined geographical space, recognised, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values.

The definition is expanded by six management categories (one with a sub-division), summarised below.

Ia Strict nature reserve: Strictly protected for biodiversity and also possibly geological/ geomorphological features, where human visitation, use and impacts are controlled and limited to ensure protection of the conservation values.

Ib Wilderness area: Usually large unmodified or slightly modified areas, retaining their natural character and influence, without permanent or significant human habitation, protected and managed to preserve their natural condition.

II National park: Large natural or near-natural areas protecting large-scale ecological processes with characteristic species and ecosystems, which also have environmentally and culturally compatible spiritual, scientific, educational, recreational and visitor opportunities.

III Natural monument or feature: Areas set aside to protect a specific natural monument, which can be a landform, sea mount, marine cavern, geological feature such as a cave, or a living feature such as an ancient grove.

IV Habitat/species management area: Areas to protect particular species or habitats, where management reflects this priority. Many will need regular, active interventions to meet the needs of particular species or habitats, but this is not a requirement of the category.

V Protected landscape or seascape: Where the interaction of people and nature over time has produced a distinct character with significant ecological, biological, cultural and scenic value: and where safeguarding the integrity of this interaction is vital to protecting and sustaining the area and its associated nature conservation and other values.

VI Protected areas with sustainable use of natural resources: Areas which conserve ecosystems, together with associated cultural values and traditional natural resource management systems. Generally large, mainly in a natural condition, with a proportion under sustainable natural resource management and where low-level non-industrial natural resource use compatible with nature conservation is seen as one of the main aims.

The category should be based around the primary management objective(s), which should apply to at least three-quarters of the protected area – the 75 per cent rule.

The management categories are applied with a typology of governance types – a description of who holds authority and responsibility for the protected area. IUCN defines four governance types.

Governance by government: Federal or national ministry/agency in charge; sub-national ministry/agency in charge; government-delegated management (e.g. to NGO).

Shared governance: Collaborative management (various degrees of influence); joint management (pluralist management board; transboundary management (various levels across international borders).

Private governance: By individual owner; by non-profit organisations (NGOs, universities, cooperatives); by for-profit organisations (individuals or corporate).

Governance by indigenous peoples and local communities: Indigenous peoples' conserved areas and territories; community conserved areas – declared and run by local communities

For more information on the IUCN definition, categories and governance type see the 2008 Guidelines for applying protected area management categories which can be downloaded at: www.iucn.org/pa_categories

In Myanmar, the definition of Protected Area under the Protection of Wildlife and Protected Areas Law (1994), states a **"Protected Area means** a geographically defined area which is designated or regulated and managed to achieve specific conservation objectives."

The categories of protected areas under the Protection of Wildlife and Protected Areas Law (1994) include:

- (a) Scientific Reserve (Strict Nature Reserve);
- (b) National Park;
- (c) Marine Park;
- (d) Managed Nature Reserve;
- (e) Wildlife Sanctuary;
- (f) Protected Landscape;
- (g) Other Protected Area determined by the Minister.

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