



CONSERVATION
INTERNATIONAL

Participatory Ecotourism Planning

Juan Carlos Bonilla

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CI Ecotourism Department, Washington DC: Oliver Hillel, Donell Ocker, Jamie Sweeting. **ProPetén/CI, Guatemala:** Sharon Flynn, Mario Mancilla, Lucky Romero, Juan Carlos Bonilla. **CI Perú:** Duval Zambrano, Ana María Chonati, Kurt Holle.

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2003 notes: Why this paper still holds true

It has been over five years since I wrote this document, hoping to document our experience and help practitioners in the field. It presents a simple, but powerful premise that proposes an explanation to why so many consultant-driven tourism master plans and strategies gather dust in shelves of regulatory agencies and local governments, and are rarely implemented: the best plan is the one the sectors affected commit to implement, not necessarily the one with the highest technical quality.

This document goes on explaining why a consultant-driven plan is likely to be difficult, if not impossible to implement:

- *Usually the consultant interviews representatives of different sectors and finds out they have divergent ideas on what the best use of resources should be.*
- *The consultant has two options: a) favor a scenario suggested by one or few of the interested sectors, or b) decide independently on a "fair" solution that provides most of what the sectors have been asking for in a plan.*
- *In any of the options, the proposed plan is likely to be rejected by one or several of the sectors.*
- *This resistance makes the plan's implementation difficult or impossible. Government agencies then usually have two options: a) enforce implementation of the plan, a costly and difficult process; or b) implement only the easiest elements and shelve the rest of the plan.*

Difficult enforcement or shelving are both common scenarios following tourism planning processes. After spending tens and sometimes hundreds of thousands of dollars in developing plans and strategies, many agencies then have to start from square one again by conducting negotiation processes. This paper contends that if the planning process incorporates the negotiation at its very core, then the resulting plans will have a strong constituency behind it to ensure implementation. It also questions the main role of the ecotourism consultant as a purveyor of technical expertise and suggests an alternative role as a mediator and facilitator to help the sectors involved reach compromise, while maintaining an acceptable level of technical quality.

The paper also presents two case studies and a simple step-by-step methodology to approach ecotourism planning using a participatory approach. The case in Guatemala is a particularly good example of the resilience of a participatory planning process. After the planning group completed the process and CI presented its results to the government, the ruling party lost elections and its political rivals took office. The new government viewed most of the resource management policies implemented by the previous government as too favorable to corporate interests, and systematically reversed most of them, throwing away thousands of dollars worth of planning. However, it eventually codified the product of the ecotourism participatory planning process, virtually verbatim, as the regulation for tourism policy in Guatemala's protected areas.

The participatory process endowed the policy with a strong constituency in all sectors affected, including the private sector, communities, NGOs, local governments and ecotourism specialists. The Steering Committee formed during the workshops blossomed later into Alianza Verde, an organization championing the principles of the policy (www.alianzaverde.org). Alianza Verde went on creating an ecotourism certification program, a joint marketing strategy and training program, all mutually reinforcing and based on the principles of the policy. The plan was no longer the property of the agency that commissioned it, but belonged to the disparate sectors that built it together and had a stake in its implementation. Such is the strength of participatory planning.

Juan Carlos Bonilla, MBA

Washington, DC, August 2003

For additional information on the process in Guatemala, please see:

<http://www.idrc.ca/books/reports/1998/45-03e.html>

<http://www.planeta.com/planeta/98/1198maya.html>

1 Introduction

1.1 Purpose of this document

In the past ten years, ecotourism has been presented as a valuable tool for conservation and sustainable development from developing countries; however, to date many of these expectations are far from being fulfilled. In many occasions, ill-planned projects are carelessly tagged “ecotourism” and their failure fuels critics that point out to degraded ecosystems, social tension generated and disappointed visitors and local people.

This document presents a model of participatory ecotourism planning based on field experiences of Conservation International (CI). CI's mission is to conserve endangered biodiversity and to demonstrate that human societies are able to coexist harmoniously with nature. Since 1989, as part of its global strategy of ecosystem conservation, CI has developed ecotourism projects in 17 countries in Latin America, Africa and Southeast Asia.

CI has found that, in many cases, the failure of ecotourism ventures and regional strategies has come from planning that had not effectively involved all relevant sectors. Despite good intentions and technical quality, the complex social and ecological conditions of the regions where ecotourism is implemented make imperative that the policies and actions defined be actively accepted and supported by other actors in the scene.

For local governments and agencies in charge of management of natural areas subject to ecotourism use, an adequate policy and strategic framework is essential to minimize the potential risks and to assure that conservation and economic benefits are effectively achieved.

To conciliate disparate interests is a hard task, but a participatory-built policy can achieve a synergy that is otherwise impossible to attain. The proposed methodology is based in field experiences where the apparently divergent interests of the sectors were transformed into coherent policies that permitted the cooperative action of all. Even though these policies do not pretend to be technically perfect, they have provided a clear, concise map of the common goals and a commitment to generate the actions to reach them.

This methodology is an easy to replicate framework, adaptable to local conditions and flexible enough to plan a tourism strategy for a protected area or for a whole region. It is based on general principles of local empowerment, participatory planning, proactive involvement of all actors, a subsidiary role of government and the continuous evolution and transformation of the practices of tourism activities.

1.2 The need for ecotourism planning

Every year, governments, economic planners and conservationists are increasingly interested in using ecotourism as one of the most promising sustainable economic alternatives in biodiversity-rich developing countries.

The reason is simple: tourism is big business. Figures associated to tourism are impressive: according to the World Travel and Tourism Council (WTTC), tourism is the largest civil industry in the world, generating 3.4 trillion dollars and more than 200 million jobs annually, and it continues to grow at an average 3.7% during this decade. This dramatic trend is even faster in developing countries, many of which can offer what between 40% to 60% of tourists are looking for: natural “untouched areas”.

While most of the industry is still concentrated in developed countries like the US, France and Spain, the most rapid segment is specialized tourism like adventure tourism and ecotourism. Every year, more people around the world decide to make

their vacations an opportunity to learn and experience a closer contact with nature and other cultures and decide to visit destinations that offer more than the traditional sun-and-beach vacation.

This explosive trend and its promises of rapid development can challenge to the maximum the resources of a country or region, and bring undesirable side effects that can threaten the very resources it depends on. In many occasions, unplanned growth has led to irreversible degradation of the natural resources and negative social impacts.

Considering its potential benefits and risks, the need for clear policies and development plans for ecotourism in protected areas or whole regions has been widely recognized. In fact, in the last ten years, regional and national governments have collaborated through tourism bureaus, protected areas agencies and development specialists with international consultants and conservation organizations to create master plans and policies concerning many regions with potential or active ecotourism activity. In many regions, a plan, and in occasions several of them, have been crafted at the cost of thousands of dollars, yet few of these have been put into actual practice with measurable success.

The challenge lies in the complexity of the issue. Ecotourism involves many actors, including of course tourists as consumers, regional and national government agencies and the private sector, but also managers of protected areas, non-government organizations, local communities and native peoples and many others.

1.3 The problems of traditional tourism planning

The creation of an ecotourism policy for a region or a protected area is in many occasions the responsibility of regional governments, or official agencies that are traditionally focused in forestry and/or biological research and have chronic small budgets and understaffing problems. The policy to be implemented will affect and

involve sectors with which the agency frequently has little formal relationship, such as the tourism industry or local communities interested in the use of the tourism resources.

The dilemma faced by the government agency is to create an enforceable policy, ideally with few resources and avoiding the need to use the coercive power of the State. If the policy affects severely the interests of any of these actors, conflict will be inevitable, leading to the need of use the limited resources available to the use of coercive dissuasion or to costly negotiations. Any of these results will prevent the implementation of the original policy.

On the other hand, a viable ecotourism policy must establish effective protection and control of the use of ecotourism resources, to minimize potential negative sequels and guaranteeing a sustainable use.

Traditionally, the process to create a policy involves the hiring of an expert who analyzes the current situation by gathering information through field visits and interviews with members of the sectors involved. Later, based in this information, the expert determines the desirable future situation, prepares a report and recommends a policy to be applied by the government.

This procedure has some clear advantages: the document is coherent and may benefit from the considerable experience of the consultant, who can also provide suggestions based on successful case studies in other regions or areas. In many cases, however, the end result is a very complete document that has a perfect plan that nobody applies, and that ends gathering dust in a shelf. In other cases, the government attempts to enforce this policy; generating conflict among sectors that are affected and aggravating, rather than improving the situation.

Why does this approach fail in many cases to provide a practicable policy? The main flaw of the traditional method is the centralized analysis and the fact that it is not built upon negotiation between the main actors. They all have the information necessary to reach consensus or compromise but are frequently in conflict, often because they are competing for the use of the same resources. Also, in many occasions the actors don't trust the government agency in charge of the management and planning. This can often be traced to the fact that in the past they have not been taken in count in the process of planning and decision-making.

The process begins to veer off track when the consultant interviews the actors and may find differences that apparently are impossible to conciliate. The consultant faces two courses of action for the formulation of the policy: a) to favor the criteria of one sector, affecting the others; or b) to define a middle ground, apparently satisfying the interest of all.

While this second alternative may seem adequate and just, it lacks three essential elements to make the policy effective and enforceable. When the interest of two or more sectors must be conciliated, it is imperative that: a) each part gives up to some extent, b) acceptable interaction procedures are established; and c) new practice and often new technology is incorporated in their daily operations to adapt to the conditions generated by the new policy. Without these conditions, a policy is a useless document.

Of course it is perfectly possible and legal for a consultant to propose a sound policy and for a government to approve it and enforce it in name of public good; forcing the sectors to give up their interests through sanctions, persuasion or other means, but this strategy only makes the policy more expensive and harder to apply.

The act of giving up some interests, of accepting protocols and procedures of interaction and adopting new practices and technologies implies a sector commitment that must be discussed and approved by groups and organizations that effectively represent those sectors. Without this commitment and internalization, enforcing even the best policy can be a permanent headache for those responsible of its application.

The purpose of the methodology presented is to build a policy by a process entirely different from the traditional one discussed above. It does not rely in the expertise of a consultant in the field of tourism, but in the effective combination of the expertise available in the actors involved in the activity in the region. It also helps create strategies that are accepted and internalized by all involved, making possible their orchestrated implementation.

1.4 Overview of the methodology

The standard methodology presented is divided in four sequential planning phases and three optional follow-up programs. Each phase is clearly articulated objectives and has some variations that adapt to local conditions.

- **Phase I: Preliminary Assessment.** Phase I permits the assessment of three critical issues necessary to the success of the process. These are:
 - a) Relevant aspects of the industry, including data on the current offer, demand, trends, etc.; and
 - b) Existing legal and administrative framework.
 - c) Stakeholders involved in the local and regional tourism scene.

- **Phase II: Strategic Participatory Planning Workshops.** Phase II involves stakeholders in a three stage planning process:

- a) Participatory analysis of the actual tourism situation, identifying barriers and bottlenecks for the activity in the region.
 - b) Classify barriers and bottlenecks according to two relevant factors: Aspects of the activity, including business, socioeconomic, environmental and legal-administrative; and geographic distribution, establishing priorities and the main barriers for each area that supports or has potential for tourism activity.
 - c) Definition of strategic plan, defining general principles of policy, priorities, strategies, actions, who is responsible for the action and indicators of progress.
- ***Phase III: Validation and Conformation of a Steering Committee.*** Once a strategic plan is created it is critical that proper follow-up puts into action the strategies proposed. The next step is then the establishing of a steering committee that includes all sectors involved, keeps the communication flow and implements the action plan.

The three optional follow-up programs that have been developed in the field experiences are:

- ***Development of Best Practices Protocols***
- ***Training on Development of Best Practice Tourism Products***
- ***Promotion Strategies***

2 Developing the methodology in the field: The Petén, Guatemala and the Inka Region, Perú Case Studies.

2.1 Summary

Between 1996 and 1997, Conservation International conducted two participatory ecotourism planning processes in major regions of Guatemala and Perú. Despite obvious differences, both countries and regions share problems created by a rapid development of the tourism industry and a poor or non-existing planning framework.

Because these processes occurred simultaneously, both were enriched by the exchange of experiences and the original plan of each one was subsequently improved by the new ideas and methods developed by the other.

The striking similarities between the challenges faced by these two geographically separated regions, and the overall success of the two processes, make us think that the methodology developed with the experience generated by both can be successfully applied with slight modifications to other areas. Many regions of the world face the now familiar combination of endangered natural and cultural resources, rapid tourism growth, little or non-functional tourism planning and little or no coordination of the interests and efforts of a varied number of actors, including the private sector, government agencies, community representatives, and development and conservation NGO's.

2.1 *Alianza Verde: Ecotourism planning for the Maya Biosphere Reserve*

2.1.1 The current tourism context in Petén, Guatemala.

Tourism in Guatemala is growing steadily since 1985, taking advantage a sociopolitical stability that begun with the country's first civil government in decades. Since then, the number of visitors to the country has increased in a 206%. In 1996 more than half-million tourists visited the country, mainly coming from Central America, the United States and Europe, and generated around 288 million dollars in revenue. While coffee production is still the most important economic activity of the country, tourism has become the second. Its rapid and continuous growth suggests it may become the most important in the near future.

While most of the tourists visiting Guatemala come attracted by cultural manifestations, since 1990 several large protected areas have been established, creating opportunities to attract nature-oriented tourists.

Guatemala has also led a process to a regional involvement in the protection of biodiversity, under a regional accord called the *Alianza para el Desarrollo Sostenible*, ALIDES. This protocol establishes the commitment to a sustainable development, with an emphasis in human development and the conservation of natural resources.

Petén is the largest *departamento* of Guatemala, covering the northern third of the country. Until the 1970's, most of its area was sparsely populated and covered by subtropical forest, but today, as the agricultural frontier advances, the remaining forest is becoming limited to national parks and other protected areas.

The largest protected area in Guatemala is the Maya Biosphere Reserve (MBR). It covers about one and a half million hectares of Petén's subtropical forests and

wetlands. The MBR is a critical conservation hotspot for the region and it also houses many large Maya archaeological sites, including Tikal, one of the most important tourist destinations of the country.

One of the long-term goals of the management of the Reserve is to develop economic alternatives that promote sustainable use of the forest's resources for the communities within its boundaries. Tourism has been considered as one of these alternatives, and several government and non-government organizations have established projects aiming to create community based tourism ventures.

Seven years later, however, the expectations of tourism becoming a real economic alternative for the rural communities of the MBR have fallen short in many cases. The reason lies in both internal and external factors:

- The lack of a coherent tourism policy that coordinates efforts of government and industry and establishes regional priorities. Traditionally centralized planning and decision-making has left little space to participate to the local citizens, who are directly affected by decisions taken by large governmental bodies based in Guatemala City, five hundred kilometers away.
- Little incentive to improve practices in the tourism industry, and no access to information on how to improve standards of quality.
- Lack of substantial training in business management specially at the level of community-based ventures

Conditions have begun to change, at a fast pace. The most dramatic external factor has been the signature of a peace accord between the Government and the guerrillas in December 1996, ending a 36-year long civil war and placing favorably Guatemala in the world news, for the first time in decades.

The peace accord is more than a cease-fire treaty, but a major reengineering of the Guatemalan state, and opens the opportunity for effective spaces of participation of the civil society in the discussion and resolution of their problems. It also improves the bad international image of the country, the single major external factor that has hindered the development of tourism in Guatemala.

2.1.2 The process

The Maya Biosphere Project, established in 1990 by a bi-national agreement between the Guatemalan and US Governments, aims to establish the conditions for the conservation of the Reserve. CI's Guatemala program, ProPetén, is one of five non governmental organizations which implement this project (with the financial support of USAID) as counterpart for Guatemalan government agencies in charge of the management of the reserve.

ProPetén is an integrated project that includes five main components: scientific research, management of natural forests, community organization and training, policy and legislation, and sustainable economic alternatives. Through this last component, ProPetén has developed an extensive experience in the field of ecotourism, and a deep knowledge of the problems faced by this activity in the region.

In 1996, considering this substantial experience, the MBR Management Council requested CI to write a Tourism Policy for the reserve. CI proposed that instead of just writing a document, it was necessary to establish a process that would address the above mentioned structural problems.

CI considered that such process had to involve all stakeholders in the activity, and invited representatives of all four main sectors involved, the private sector,

involved government agencies, community representatives and NGO's involved in the conservation of the MBR.

All sectors responded to this invitation and participants and organizers of the process included the Guatemala Chamber of Tourism, the Peten Guild of Community Ecotourism, the Peten Guide Association, the Peten Governor's Office, CONAP (the government agency in charge of the administration of the MBR), INGUAT (Guatemalan Tourism Board), the Peten Artisan's Association, ecotourism committees from several communities, CARE Guatemala, municipal governments, and others.

The process proposed aimed to attack the barriers that block tourism as a tool for conservation and sustainable development of the region, establishing the basic political framework and creating the conditions for the development of competitive ecotourism ventures in the MBR. It includes:

- 1) The participatory design of a coherent political frame for tourism in the MBR. This frame will include a draft of the Tourism Policy for the MBR, which will be proposed to CONAP and other pertinent government agencies to apply. The policy is based on a group diagnosis of the situation and includes principles, guidelines and actions agreed in consensus.
- 2) The design of best practices codes for the different tourism activities in the Reserve. These codes will incorporate the spirit of the policy in the everyday activities of the industry and will provide a guide of operation and conduct for all actors involved.
- 3) The establishing of local capacity, providing the local industry and the community committees with the tools to design, implement and market successful tourism products that fulfill the guidelines of the Policy and the

codes. The training will also facilitate the positioning of the region in the ecotourism international market, necessary to generate the demand that will stimulate the application of the best practices.

2.1.3 Current state of the process

The first workshop took place in Flores, from the 14th to the 16th of May 1997, and provided the opportunity for the participants to establish a sound diagnosis of the current situation of tourism in the region and its complex scene of interests and conflicts. A common language was established, and basic concepts were defined.

More than forty essential problems and barriers were identified, and more than sixty corrective or preventive actions were proposed. Even though during the first day of work old conflicts between stakeholders were revived, the methodology employed permitted to canalize all the discussion to the proposal of concrete principles and actions that have the approval of all sectors involved.

The second workshop, from 26th to 28th of June, has generated the base for the Tourism Policy, presenting principles, guidelines and actions, considering all aspects of the situation: environment, legal, socioeconomic and business. CI is at the moment compiling the information and preparing a policy draft based in this input.

Probably the most important achievement of Alianza Verde is that the participants have themselves begun a process to implement actions of cooperation and coordination, defining an agenda that includes the development of the best practice codes and the positioning of the group as a counselor to local government agencies in terms of tourism in the region.

The *Declaración de Flores*, a document drafted by the participants, establishes their commitment to the principles of the policy proposed and to support the

initiatives of the agenda. It also establishes a steering committee representing all sectors that will ensure the follow-up.

The general agreement between the participants establishes a precedent of cooperation between sectors that had been traditionally in conflict, blaming each other for the problems faced by tourism in the region. It has also created an environment of constructive enthusiasm for developing a model of participation of the civil society in the planning of the use of the natural and cultural resources, strengthening the subsidiary role of the government.

From this successful beginning, Alianza Verde has conducted the second and third phases of the plan proposed originally. In September 1997 a two-day workshop to create the best practice code was conducted, with an important participation of the private sector. In October, 26 representatives of all sectors participated in the first six-day long Ecotourism Product Development Workshop. This event, facilitated by CI experts, provides the participants with the tools to create best-practice tourism products, and to conduct similar workshops within their groups, communities and organizations, enabling them to develop their own permanent training programs.

The training will permit the private sector and the community groups to successfully diversify the tourism offer in the region, and to position their products in the international market. The growing demand for this kind of products will in turn generate incentives for the local tourism industry to adhere to the guidelines of the best practice codes and raise their standards of environmental and social quality.

Only the implementation of successful best-practice tourism products in the daily operation of the private sector and community ecotourism committees will make functional the principles of the policy and the codes, ultimately leading to the fulfilling of their objectives of conservation and sustainable development.

With the initial original stage successfully completed, Alianza Verde faces the challenge of strengthening its role as an open forum and clearinghouse to discuss the problems of tourism in Peten and propose corrective strategies and actions through the coordination of efforts of all involved. Meetings planned for the end of 1997 will discuss strategies for 1998 to consolidate the process and to implement selected actions of the policy proposed.

2.2 Planning the Ecotourism Strategy for the Inka Region, Perú

2.2.1 The current tourism context in the Inka Region, Perú

Tourism in Perú had a growth tendency between 1983 and 1988. Since that year, political violence and other factors caused a major crisis that reached its deepest point in 1992, when only around 200,000 tourists visited the country.

As in Guatemala, sociopolitical conditions in Perú are also changing rapidly, and the pacification of the country and economic reforms led by the present government have recovered a growth tendency in the number of visitors to the country. In 1996 about half-million tourist visited Perú, generating an estimate of 535 million dollars in revenue for the country.

The Inka Region is located to the southeast of Perú and includes three sub-regions: Cusco, Apurímac and Madre de Dios. It is geographically divided in two vast and different parts: the *Sierra*, which includes the Andes mountain range and its internal valleys, and the *Selva*, where the eastern slopes of the Andes come down to the Amazonia.

The traditional tourist attractions of the region are the colonial city of Cusco and the ancient Inca citadel of Machu Picchu. In the last years, natural attractions like the Manu Biosphere Reserve and the Bahuaja-Sonene National Park are also becoming important destinations for international tourists.

The Region has a long tradition of tourism planning. The Regional Government has its own tourism development and planning agencies, which complement the planning work of Central government institutions like PROMPERU, dedicated to the promotion of the country's image in the exterior; the MITINCI, Ministry of Industry and Tourism, and the National Institute of Culture (INC) which is in charge of the protection of the cultural heritage of the nation.

The main regional agency dedicated to tourism planning is PLAN COPESCO, which has planned and built most of the infrastructure associated with tourism in the region since the 1960's. Other agencies directly involved with tourism in the region include the Dirección Regional de Industria y Turismo, the Proyecto Especial Parque Nacional del Manu and the Proyecto Especial Plan Maestro Santuario Histórico Machu Picchu.

Indeed, the main problem of tourism in the Region seems to be excessive planning and little coordination of multiple agencies. In the first stage of the process, CI had access to several well written and comprehensive master plans and strategies created by international consulting firms to develop tourism in the Region. Despite the high technical quality of many of them, very few of the strategies proposed were ever implemented.

The most evident problems of tourism in the Region are:

- The clashing interests of many local and national planning and development agencies. There is little coordination in their efforts and their areas of jurisdiction are not well defined.
- A rapid tourism growth that is challenging the existing infrastructure. There is a tendency to massive operations, centralized in two or three main attractions. Protected areas lack adequate planning to monitor and prevent potential impacts of the unplanned activity.

- There is very little involvement and participation of all actors of the industry in the decision-making of strategies and investments in the sector.

2.2.2 The process

In March 1996, the United Nations Program for Development (UNDP) requested CI to develop a strategy for the management of ecotourism in the Inka Region. This request was based on a 1995 agreement between UNDP and the Inka Region Government.

CI has had an important presence in the Inka Region since 1995, when it launched PRODESCOT, a project aimed to establish the conditions for the conservation of the Tambopata-Candamo Reserved Zone, now the Bahuaja-Sonene National Park, in Madre de Dios. PRODESCOT is an integrated program, which includes surveying and mapping, monitoring and sustainable use of natural resources and conservation enterprise.

The process proposed by CI to develop the strategy had three phases:

- 1) An analysis of the ecotourism situation in the Region, conducted by CI's Ecotourism Program experts and local counterparts.
- 2) The participatory design of the Strategic Plan, in three sub-regional workshops which would include all actors involved in the activity. Each sub-regional workshop would identify and prioritize ecotourism sites and products, barriers and opportunities and create an action plan. The final draft of the Strategic Plan would be created in a Regional Forum, integrating the action plans of each sub-region.
- 3) The development and implementation of the strategy, through the involvement and coordination of all stakeholders.

2.2.3 Current state of the process

The first sub-regional workshop took place in Abancay, the capital of Apurímac in June 1997. This sub-region, to the southwest of Cusco, has little tourism development, thus the workshop created not only a diagnosis of problems and barriers and a policy to manage ecotourism, but an inventory of potential ecotourism sites and products and a plan to develop them.

The most important upgrade from the methodology used in Guatemala, is that the Apurímac workshop generated a geographic analysis of the sub-region. This analysis permitted to prioritize and focus in the main areas that have an ecotourism potential. It also permitted to fine tune the understanding of the barriers and bottlenecks, by producing an individual diagnosis for each area or product.

It also permitted to create individual action plans for each product, as part of a larger sub-regional action plan. The action plan, like the one in Guatemala, included strategies, actions, indicators and responsible actors, but it was actually developed during the workshop and not compiled by the facilitators like in the first Guatemala workshop.

A challenge originated by this workshop was the little involvement of other sectors outside of government. The main reason was the fact that Apurímac does not have an established ecotourism private sector, but also the tradition of centralization of planning in the country.

The second workshop took place in Puerto Maldonado, the capital of the sub-region of Madre de Dios, from September 30 to October 2 1997. Unlike Apurímac, Madre de Dios has a strong and growing ecotourism industry. Located to the west of Cusco, most of Madre de Dios is still covered by Amazonian rainforest and most of its tourism industry is nature oriented. In the last years, Peruvian and foreign investors have built more than eleven ecolodges near the Tambopata-Candamo

protected zone and the Bahuaja Sonene National Park, and most of them offer tours by boat and jungle hikes.

The problems faced by Madre de Dios are very similar to those in Petén, especially considering the threats to the protected areas and the growing interest of involving local communities in the industry as a conservation strategy.

The workshop in Maldonado brought together a wider spectrum of participants than the one in Abancay, and included representatives of the private sector, community groups like FADEMAD (an agrarian union) and FENAMAD (a native communities' association), local and national NGO's and officers of both Regional and Sub-Regional governments.

While the Apurímac workshop had focused in analyzing potential ecotourism sites and a strategy to develop them, the Madre de Dios workshop was one of analysis of current problems and bottlenecks generated by an ongoing unplanned, full blown activity. The conflicting interests of all involved and the wider spectrum of participants resembled more the first workshop in Guatemala.

However, the experience of the possibility of building a team like Alianza Verde, and the refined methodology repeated the successful experience of Guatemala: The very complete action plan developed by the participants of this workshop was reinforced by establishment of a steering committee with representatives of all sectors involved, and a public commitment of the chief of the Regional Government to support and help implement the Plan. Once again, the initial state of widespread distrust and conflict was replaced by a spirit of constructive enthusiasm and can-do attitude, and established a precedent of cooperation and coordination in the Sub-Region.

The third workshop took place in Cusco a week later. Conditions in Cusco are completely different from both Apurímac and Madre de Dios; Both the city of Cusco and Machu Picchu are the leading tourism attractions of the country, with a flow of around 350,000 visitors per year. While most of the tourists come to the traditional cultural destinations, there's a growing interest in nature-oriented tourism. Destinations like Manu and activities like trekking, mountaineering and white-water rafting are increasingly popular.

Despite everybody feared the long tradition of conflict in this sub-region, the workshop in Cusco was less conflictive than the Madre de Dios workshop, and all the activities flowed easily. The methodology, refined by the earlier experiences, produced a clear action plan and a well- balanced steering committee. Among others, the Committee includes top executives of the Sub-Regional Government and APTAE, the Peruvian Association of Adventure Tourism and Ecotourism, which is the leading private sector association of the sector.

The crucial moment for the Inka Region Ecotourism Strategy will come in the last week of January 1998, when the steering committees of the three Sub-Regions will meet at the Forum, in Cusco. In this event, the three separate action plans must be coordinated in one single, coherent strategy and presented as a whole to the larger political scene of the Region, including potential lenders and donors.

Once this coherent strategy is constructed and presented, it will be a responsibility of all those who participated in building it to make sure it does not follow the fate of the other tourism master plans for the Region. The big difference is, all actors built this strategy together, and it belongs to all.

2.3 A comparative analysis of both planning processes

Even though Guatemala and Perú are geographically separated, some conditions are strikingly similar, and the common elements are also common to many other regions where CI works around the world.

Despite these similarities, there were obvious differences. The fact that the methodology was easily and successfully adapted to local conditions is a proof of its flexibility.

The most evident common elements are:

- 1) Both regions are facing the challenge of a growing tourism industry, reflecting the worldwide trend to push the frontier towards areas previously not visited. A tendency to sociopolitical stability in both nations is also promoting a rapid growth of tourism. Local governments are increasingly interested in capitalizing this trend to generate economic development for their regions and have invested in tourism planning in the past.

- 2) Natural protected areas like Manu, Tambopata Candamo and the Maya Biosphere Reserve are becoming increasingly attractive for investors interested in develop tourism ventures. This growing interest is reinforced by the hope that tourism can help the conservation of the areas by providing income for the management of the park, increase environmental awareness among visitors and provide sustainable economic alternatives to local neighboring communities. Unfortunately, the park administrations frequently lack an effective planning of how this growth should develop, opening the possibility to create disastrous massive development programs which could endanger the long term sustainability of the reserves.

- 3) The problem is that traditional planning methods, as discussed in Section 1.3, do not effectively involve all stakeholders, and resulting strategies are frequently hard if not impossible to implement because some concerned parties do not cooperate or openly adverse the plans; if strategies are implemented by force, usually the results are disastrous. For this reason, recognizing the limited success of previous planning ventures, local governments invited CI to propose an alternate method.

- 4) The traditional destinations in both regions, Tikal and Machu Picchu, are reaching critical conditions of stress due to massive uncontrolled visitation. This condition leads to common problems associated with tourism in natural areas like trail compaction, disturbance of wildlife and solid waste pollution. These problems are increased by the predominant massive operative model followed by most tour companies in Guatemala and Perú: large groups visiting the area for short periods of time. This process ends degrading both the site and the experience of the visitors and endangers the sustainability of the whole tourism destination. At the same time, little of the revenue generated contributes to the management of the protected areas and the conservation of the resources it depends on.

- 5) While there is a patent interest in both regions to diversify the offer and the markets, in many opportunities local businesspeople lack the know-how to build competitive ecotourism ventures and position them in the market. This condition is usually even more critical in the case of small family-run ventures and community ecotourism programs which, if successful, could widen the economic impact of the activity and in many cases, help release pressure on natural areas.

The main differences between the Guatemala and Peru processes are:

- 1) The Guatemala workshops dealt with only one main geographic region to create directly the regional tourism policy, while the Peru ones dealt with three sub-regions with significant differences in their tourism development stages. While Apurímac has almost no tourism at all, Madre de Dios shows the problems of rapid growth and immature support systems and Cusco is a mature destination facing the challenge to adapt to new trends and to revise past strategies. The situation in Perú was managed by creating Sub-Regional action plans to be merged in one Regional strategy by means of the Forum.
- 2) The Guatemala policy planning was part of an integrated strategy that also included the development of best practice codes and training. Both issues were also raised during the discussions in Perú, but were not part of the initial plan. In Perú, CI was specifically requested by the Inka Region Government to create a short, medium and long-term strategy for tourism development in the Region.
- 3) Even though CI conducted the process in both cases, CI-Guatemala has a strong position in the local political context thanks to its long term involvement in the Maya Biosphere Project, while the activities of CI-Perú are restricted to only one of the three Sub-Regions and thus its role in the process was more of a consultant under the Regional government.
- 4) The process in Perú was directed openly by the Government, and the other actors were invited to participate, while in Guatemala the government agencies did not play the lead role, but were representatives of a sector at the same level of the others. The reason for this difference is probably the strong tradition of government authority in Perú, and the trend towards a more subsidiary role of the Guatemalan government, who is facing the challenges of reconstructing the nation after more than 30 years of war. Another reason for this difference is the existence in Perú of a strong regional authority with a tradition of planning, a factor that is non existent in Petén. In any case, the strong role of government

is an added challenge for an effective participatory planning, because many actors openly distrust the reasons behind them being involved in the process. Conditions for open participation improve in an atmosphere that provides a balanced role of all involved and if the government participates at the same level of all other actors.

2.4 Conclusions

- 1) It is essential that regions and protected areas with known or potential tourism development create sound strategies and policies to guide decisions to manage this development, to maximize potential benefits and reduce the negative impact that is often associated with it. This is recognized by regional governments and protected areas managers of many of the areas where CI works.
- 2) Tourism planning must include all involved stakeholders. A policy defined without their participation will be hard, if not impossible, to apply with relevant success.
- 3) As discussed in Section 1.3, the traditional consultant-based approach fails to include effectively all actors, and it is imperative that participatory processes such as the one presented be used to generate regional tourism policies and strategies.
- 4) The experiences of the planning processes in Guatemala and Perú, provide case studies that demonstrate the success of a participatory approach in creating sound policies and strategies, and a commitment from the actors to implement it.

- 5) The similarities and differences between both regions and the planning processes implemented suggest that : a) Many other regions where CI works worldwide face similar challenges, associated to unplanned tourism growth, conflicting actors in the tourism sector, and limited technical and financial resources to conduct adequate planning ; and b) the methodology developed provides a simple and effective tool to successfully meet these challenges

3 The methodology

The implementation of the process in any given region or protected area usually begins with the establishment of an agreement with the organization responsible for tourism planning, usually the regional government or the agency in charge of the protected area in question. A clear agreement defining responsibilities of both counterpart and planner is very important to prevent later misunderstandings.

3.1 Phase I: Preliminary Assessment and establishing Organizing Committee

3.1.1 Summary

Phase I is a critical stage for the overall success of the planning process. It includes an assessment of the actual situation of the region, in terms of who is involved, which are the relevant factors and what is the political and administrative scenario.

The data are collected by means of secondary research based in consultation of reference materials and a site visit collect first-hand information and identify stakeholders through interviews.

Phase I is divided in four stages:

3.1.2 Stage I: Analysis of the current tourism context in the region

The most likely sources of information are the local government tourism bureaus, if they exist. Compile the information and prepare a brief paper outlining the profile of the region. Identify previous planning efforts and get copies of them.

The analysis should characterize the current state of tourism in the region and will answer essential questions to understand **the demand**: *How many tourists visited the region in the last year?, In the last ten years?, What is their demographic*

*profile (national origin, gender, socioeconomic status)?, Is their average stay and expenditure known?, Are there marked tourism seasons?; **the existing offer:** Which are the main tourism destinations of the region? Are there evident potential destinations that are not yet developed?; **the industry:** Which are the largest tourism businesses?, Which are the fastest growing?, Are there competing destinations in neighboring regions or countries?, Which are the main activities offered to visitors?, Are there community ecotourism ventures?, Do they look successful?;*

3.1.3 Stage II: Analysis of the current legal and administrative frame

The policy or strategy to be created must fit the existing legal and administrative frame. Identify and compile the laws other existing regulations pertaining tourism in the region and country. Usually the country's Constitution and minor laws include general rulings on economic rights, protection of the natural and cultural heritage and environmental regulations. More specific rulings, like the ones establishing regulatory agencies and protected areas must also be identified.

It is important to check if the country has ratified international conventions on tourism and the environment, like GATT, CITES, RAMSAR, the 1982 Manila Declaration of the WTO, Agenda 21, and others.

3.1.4 Stage III: Stakeholder analysis

The single most important issue in the success of the methodology is the participation of all those involved in the activity. The actors and builders of the policy are all those who will be affected or must take responsibilities of its implementation. Of course, it is impossible to have everybody involved in tourism in

the region attend a workshop, so the identification of suitable representatives of all sectors is critical.

The challenge is to build a group that has a wide representation, and keep the number of participants to a manageable size, between 20 and 45 participants. Who is invited must depend of its existence in the scene and its interest to participate, and not from the political will of the organizing agency. The richer the group, the better the result; and even if well known conflicts between two or more actors exist, not to include a sector that could be interested to participate will not fulfill the purpose of the methodology.

Typically, there are four major sectors involved in tourism in a given region:

- **Government Sector:** Besides the regional government and the agency in charge of economic planning, identify agencies concerned with tourism development and regulation, environmental regulation, management of protected areas, administration and protection of cultural resources, training and education agencies, municipal and provincial authorities and legislative organs. Include also multilateral and bilateral agencies conducting development or conservation programs in the region.
- **Private Sector:** If there is a guild or chamber of tourism, assess its strength and coverage of the sector. Besides organizations, invite all major tour operators, transport companies and hotels. Make sure you also invite a good number of small businesses.
- **Community sector:** Invite representatives of local communities, not only formal but also defacto leaders. Include major organizations and small groups. Very frequently, local communities are already involved in ecotourism ventures; identify suitable representatives of this ventures.
- **Non Governmental Organizations:** Especially in protected areas, there may be other organizations with relevant activities in the sector. Include

environmental associations, development NGOs, guide associations and others.

Representatives of all stakeholders must be selected by an interview process, in which they are informed of the process and its methodology and asked to participate. Ideal candidates should represent the opinions and biases of their sectors, have good standing among their peers, and understand well the issues concerning their sector and the region. The best representatives for government and private organizations are not necessarily the top executives or chairmen, but those involved in the first line of decision making, like vice-presidents, public relations managers and special advisors or consultants.

3.1.4 Stage iV: Establishing the Organizing Committee

In this stage, an organizing group should be conformed to provide support in the logistics of the process. The Committee should include the local government counterpart and selected stakeholder representatives. Ideally, members of this Committee will be trained in the methodology and participate in the Planning Workshops as co-facilitators.

3.2 Phase II: Strategic Participatory Planning Workshops

3.2.1 Summary

The core of the methodology is composed by the planning workshops. These three-day long workshops follow an interactive methodology loosely based in ZOPP¹, a participatory planning strategy developed by the German cooperation agency GTZ in the 1980's. The main virtue of ZOPP is that it provides a graphic interface to understand how barriers and problems relate to each other, from cause to consequence. Because it is based in the writing of concise sentences in 4 by 6-inch cards, it prevents long verbal discussions and makes easier to admit or attack an idea or concept without involving the person who proposed it.

The objectives of the workshops are:

- a) To generate participatory analysis of the actual tourism situation, identifying barriers and bottlenecks for the activity in the region;
- b) To classify barriers and bottlenecks according to two relevant factors: Aspects of the activity, including business, socioeconomic, environmental and legal-administrative; and geographic distribution, establishing priorities and the main barriers for each area that supports or has potential for tourism activity; and
- c) To create a strategic plan, defining general principles of policy, priorities, strategies, actions, who is responsible for the action and indicators of progress.

How many planning workshops are necessary? The information gathered by Phase I will help decide the number of workshops. If the region for which the strategy is being planned is divided in sub-regions that have very different degrees

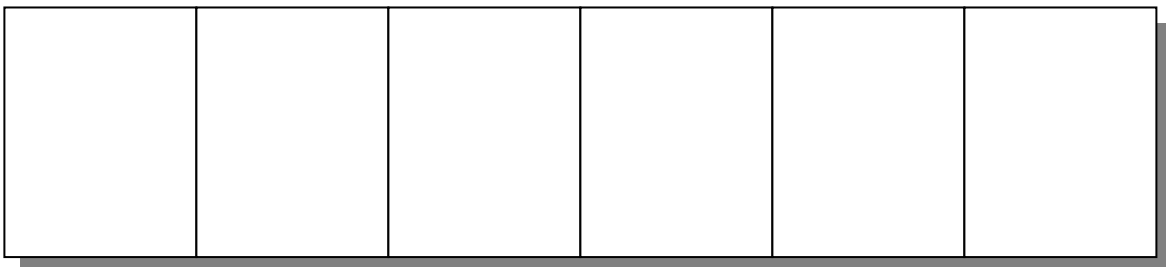
of tourism development, or very marked differences, then probably it is a good idea to have at least one workshop for region.

3.2.2 Preparation of the workshops

The first step is to define dates and places of the workshop with the Organizing Committee and to issue invitations. The invitation list must be based in the stakeholder analysis, and not in the will of the counterpart. This is a delicate issue, as the counterpart probably will not like to invite groups or persons they are in conflict with. However, as it has been discussed, the participation of all sectors is vital. Negotiate with the counterpart the inclusion of all sectors identified in Stage I.

The location of the event is important. Choose a large room that has at least one wall suitable to place the work area, which is composed of Styrofoam plaques; at least six meters long. Arrange for coffee breaks and lunches for the participants.

The basic materials for the workshops are Styrofoam plaques, 6" by 4" cards, map pins, flipchart paper and color markers. A complete list of materials is supplied in Annex B. Prior to the first day, arrange the Styrofoam plaques in the wall, one next to the other, like this:



Prepare a folder for each participant including the agenda, the document with the information on the current tourism information gathered in Phase I, a map of the

^{1 1} ZOPP: *Ziel-Orienterte Project Planung*, or objective-oriented project planning.

region and other relevant information. Also, arrange for a person to write the summaries and conclusions during the workshop.

DAY ONE

3.2.3 Stage I: Presentation

In many countries all workshops and events begin with a formal protocol inauguration. The Organizing Committee can be in charge of creating the agenda for this part.

A presentation of the information gathered in Phase I, complete with overhead projections and related to the document in the participants' folders will arise interest and help them understand the challenges ahead. Another important activity is to have a presentation on the key concepts, i.e. ecotourism, sustainable development, participatory planning, etc.

Once this step is finished, have all participants to present each other. An icebreaker activity is recommended to establish a comfortable atmosphere; to select an appropriate icebreaker, consult a book on group dynamics.

At this stage present the rules of the workshop methodology:

- The basic tools are the cards (make sure everyone has a large number of them and several color markers). The participants should write their ideas and concepts in them, using always a verb, and limited to three or four lines of text. Only print can be used and only one idea per card.
- The cards are fixed to the Styrofoam planks with the map pins.
- The concepts written are discussed by the group, and must be accepted by consensus. Once they are accepted, they are considered the official opinion of the group.
- Once the concepts in the card are accepted by group consensus, they no longer belong to the person who wrote it, but to the group.

- The cards can be moved of position or discarded by consensus of the group.

There are four special cards that should be affixed next to the participants' cards in special circumstances:



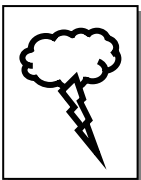
Exclamation point: When the group feels that a particular issue is very important (i.e. there are several cards carrying similar concepts)



Question sign: When there is no information available within the group about a particular issue (i.e. nobody knows the answer to the question "how large is the demand for our products in Switzerland?")



STOP sign: When the discussion is drifting away from the theme and becoming circular.



Storm sign: When the group can't reach a consensus.

3.2.3 Stage II: Group diagnosis of the situation

Defining and classifying the problems:

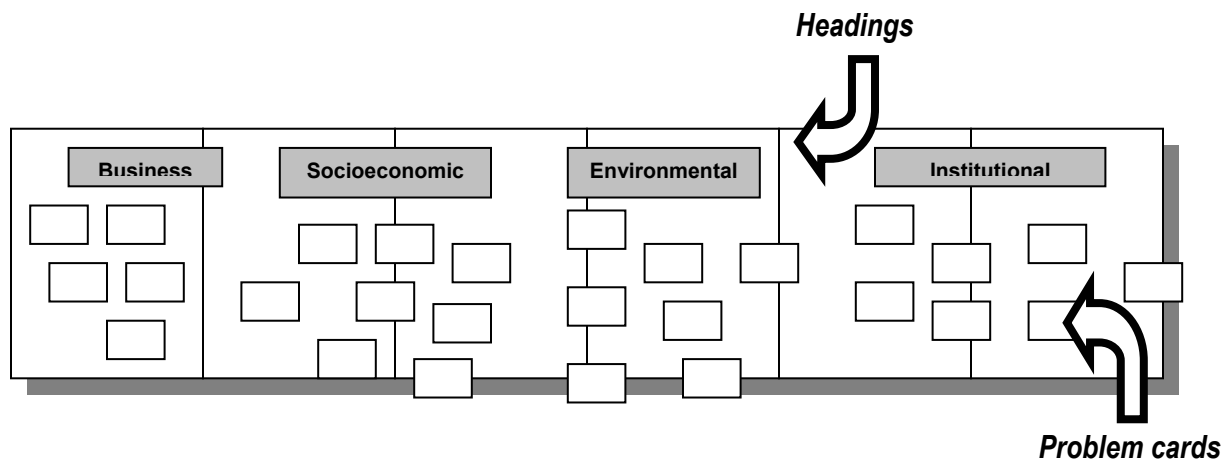
The first part of the actual planning process is an analysis of barriers and bottlenecks affecting ecotourism in the region. For this, everyone must think of as many actual problems, write them in cards and fix them to the Styrofoam.

Very likely, at the end of a short period, there will be many cards fixed, accounting for the most felt problems in the region. Once this stage is finished, the facilitator must check them one by one, asking the group if everyone agrees about the idea presented being a problem. If an idea is not very clear, then should ask the author for a more clear statement. If an idea is repeated, then only one of the cards

should remain; the group must agree that the concepts are similar and which one should stay.

Once all the cards have passed this initial stage, they should be classified according to their theme. For this procedure, remove the cards, distribute them among the participants, and ask them to use five minutes to move the cards and place them under headings of four major themes. Its a good idea to write these cards previously, fix them to the Styrofoam and cover them with blank cards; once you reach this stage, remove the cover.

Once they are finished placing the problem cards, the workspace will look like this:



After all cards are placed, once again the facilitator must review the workspace and ask the participants if everyone agrees that the cards are correctly classified. If the group agrees, then cards can be moved from one theme to another.

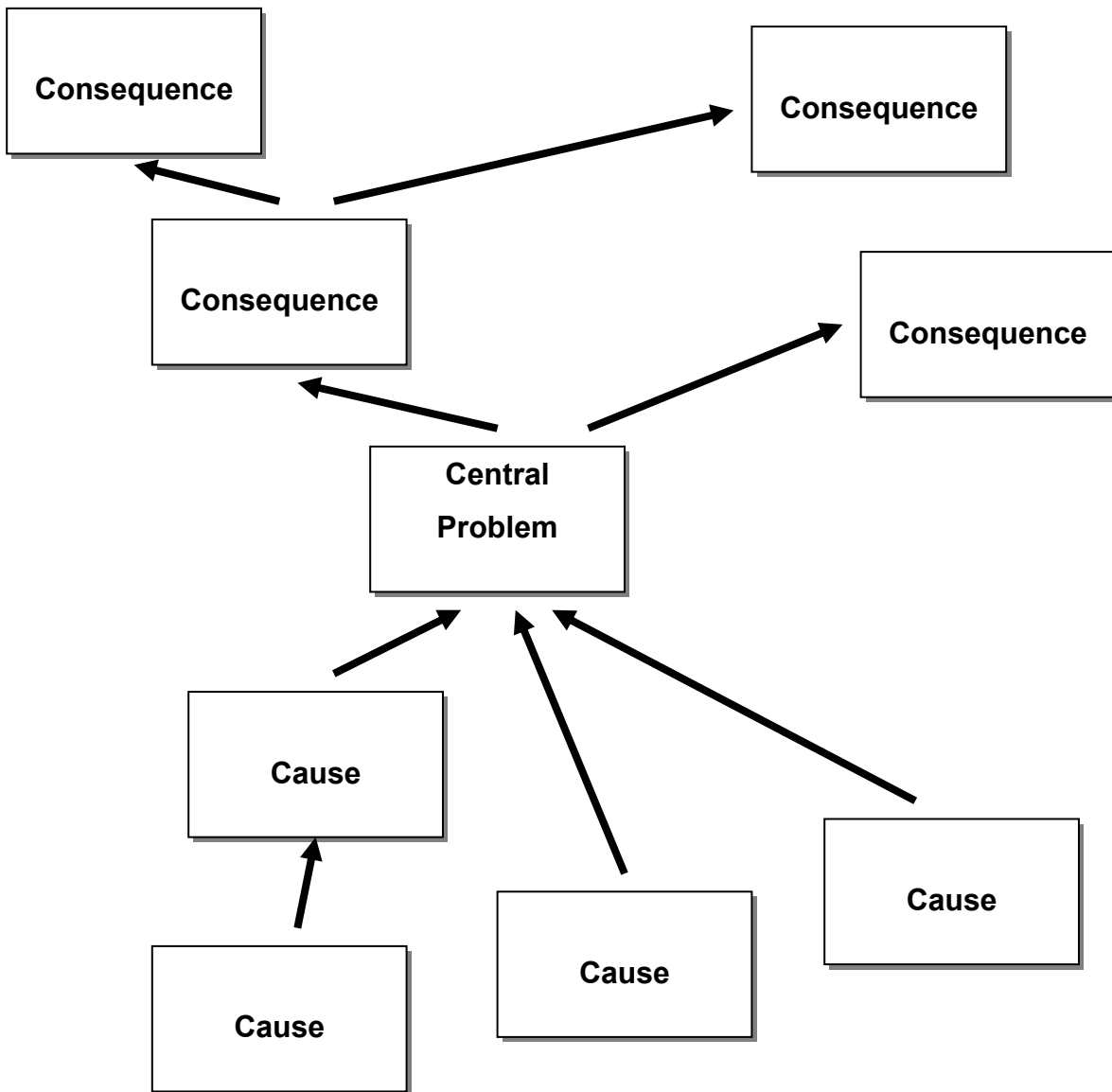
Once there is a consensus, all cards containing problems must be removed from the workspace and put away, keeping them in groups.

Creating problem trees

For the next stage, the participants must divide in groups. The best way is have them write their names in cards and place them under the theme headings. Make sure all groups have more or less an equal number of participants.

Once the groups are ready, their task is to classify the cards to create a problem tree. The basic assumption is that generally the problems can be classified as causes and consequences, one leading to the other.

A problem tree composed with the problem cards can take more or less this form:



The best way for the participants to classify them is to ask themselves “Why does this problem exist?”; if the reason is a problem written in a card, then this card must be placed below. In some occasions, the group may know the cause of a particular problem, but it is not written in a card, therefore, the group should write a new one.

A problem tree can be built by actually pasting the cards in a flipchart sheet or drawing it on paper. The most important part of this stage is to identify the central problem, the most important in the theme of discussion. Give enough time for the groups to prepare their work. Have a representative of each group present their problem tree to the general.

DAY TWO

3.2.4 Stage III: geographic analysis and local action plans

Creating new groups by sites or regions

The second stage of the workshop integrates a geographic analysis. For this, replace the theme headings by the names of the main regions or attractions of the zone for which the strategy is being created. It is a good idea to get a group consensus about the areas chosen. In any case, it is important not to have too many areas; if there are too many and the groups would end up too small, try to eliminate non-priority areas or to group them in larger units.

Use the technique of having the participants put their names under the headings to form the groups.

Once the groups are formed, they must work together to create an action plan that will address the most important problems that each region or attraction faces.

They should select the most important problem of each theme of the area they are working and propose actions to solve them, including details like for which term the actions must be conducted, who should be responsible and clear indicators that prove that the action has been completed.

The following matrix is used to help them think in the essential elements and to bring uniformity to the plans they prepare:

Problem	Actions	Short	Mid	Long	Responsible	Indicators
		term	term	term		

Here are some suggestions to help the completion of the matrix:

- (a) **Problem:** They should enumerate here the problems they have identified as most important in their area or site. Is better if they select only one principal problem from each theme's problem tree (not necessarily the main problem)
- (b) **Actions:** They should enumerate the actions they recommend to solve the problems stated in the column at left. Several actions may be necessary to achieve this goal. Actions proposed must be realistic and directly aimed to resolve the problems stated.
- (c) **Statement of term of the actions:** They should place an "X" in the chosen column, to indicate whether the action in that line is a short, mid or long-term action.
- (d) **Responsible:** Indicates who should be responsible of implementing the action recommended. Ideally the responsible organization or person is part of the

group proposing the action or is participating in the workshop, so can take commitment or explain why a proposed action could not be implemented.

- (e) **Indicators:** They help to prove that an action has been completed. Indicators must not be subjective, and should have a “yes” or “no” answer if someone asks if they are attained. The best ones are numerical. They should also state the lapse of time they consider necessary to reach them.

DAY THREE

The local action plans must be presented by a team representative to the general group, discussed and approved.

The preliminary assessment, the group diagnosis and the local action plans build up the regional strategy document. It must be compiled, circulated among the participants for comments and published.

3.2 Phase III: Validation and conformation of Steering Committee

The strategy built during the workshops must be validated by the stakeholders, and a steering committee must be formed to assure its implementation.

If only one planning workshop was implemented, then the participants must finish the third day by electing a committee that effectively represents all of them. The committee should not be very large, but the final number of members should be left to the group to decide. It is recommended that the committee should involve all sectors that participated in the planning process and to avoid an excessive concentration of representatives of one sector.

If several planning workshops were implemented, then it is necessary to have forum to bring the action plans together and build the strategy with them. In that case, the participants of each workshop should name representatives for the forum, and then a final steering committee can be elected.

The Steering Committee should act as steward of the proposed strategy, ensuring that responsible organizations are aware of the role they play and providing the necessary pressure in order to stimulate the implementation of the actions recommended. Follow-up programs can include:

1. **Best practice codes.** These are useful tools to integrate the principles of the strategy into tourism businesses' daily practices. Best practice codes can also serve a role helping the marketing of the region or protected area, and to stimulate businesses to live up to their claims.

2. **Training** can be implemented at different levels:
 - Ecotourism management planning for protected areas, oriented to government officials, NGOs and trade chambers. The training should include themes like visitor impact management, zoning, interpretive services, etc.
 - Ecotourism product development, aimed to train private sector members and community enterprises on the development of successful ecotourism products. Issues considered must include resource inventory and evaluation, market analysis, resource-market match, product development, marketing strategies and business planning.
 - Hospitality and guide courses, oriented towards operative personnel, like receptionists and drivers. Guide courses should include training in interpretation, group management techniques, etc.
 - Community ecotourism training: Courses oriented to help communities understand concepts, risks and benefits, etc.

3. **Marketing strategies:** aimed to promote best practice products and the region or protected area as an ecotourism destination. Issues considered should include trade fairs, printed material, Internet websites, reservation systems and networking with international operators.

Annex: List of Materials

For a basic workshop of about 35 participants:

- 15 Styrofoam plaques
- 500 6"x4" cards
- 50 permanent markers, assorted colors
- 200 1" map pins
- 100 flipchart sheets
- masking tape
- scissors
- glue sticks

Annex: Logistic checklist

- Participants confirmed
- Workshop room ready. (tables, chairs, tablecloths)
- Workspace ready (Styrofoam plaques in place)
- Lunches and coffee breaks confirmed
- Ice and water for tables
- Name tags ready
- Folders for participants ready
- Materials ready (see materials list above)
- Inauguration honor speakers confirmed
- Participant diplomas ready
- Equipment for initial presentations (overhead projector and screen, VCR and TV if necessary)
- Closing event ready (special speakers confirmed, press release ready, media invited)