

NATIONAL ECOTOURISM STRATEGY & ACTION PLAN 2013-2022

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For more information about this publication, contact:

BIODIVERSITY MANAGEMENT BUREAU (BMB)–
DEPARTMENT OF ENVIRONMENT AND NATURAL RESOURCES (DENR)
Quezon Ave. cor. Elliptical Rd., Diliman, Quezon City 1100, Philippines

DEPARTMENT OF TOURISM (DOT)
The New DOT Building
351 Senator Gil Puyat Ave., Makati City 1200, Philippines

FRONT COVER:
FROM LEFT TO RIGHT : PUERTO PRINCESA UNDERGROUND RIVER, PUERTO PRINCESA, PALAWAN CITY (DENR-BMB/GEORGE TAPAN) | WHALE SHARK, DONSOL, SORSOGON (DENR-BMB/GEORGE TAPAN) | IBULAO RIVER, IFUGAO (DENR-BMB/GEORGE TAPAN) | MT. PULOG NATIONAL PARK, BENGUET (MARC ANJO CLASARA) | RICE TERRACES, BANAUE (DENR-PUBLIC AFFAIRS OFFICE) | HUNDRED ISLANDS NATURAL PARK, ALAMINOS PANGASINAN (DENR-BMB/GEORGE TAPAN) | CALBIGA CAVES -SAMAR ISLAND NATURAL PARK, SAMAR (DENR-BMB) | EL NIDO, PALAWAN (PHILIPPINE COUNCIL FOR SUSTAINABLE DEVELOPMENT) | TAAL VOLCANO PROTECTED LANDSCAPE (DENR REGION 4A) | MAYON VOLCANO NATURAL PARK, ALBAY, BICOL (DENR-PUBLIC AFFAIRS OFFICE).

NATIONAL ECOTOURISM STRATEGY & ACTION PLAN 2013-2022

Prepared by the NATIONAL ECOTOURISM STEERING COMMITTEE
and the ECOTOURISM TECHNICAL WORKING GROUP

February 2014
PHILIPPINES

Message from DENR

Ecotourism is seen as a means for reducing poverty that will hasten the fulfillment of the UN's Millennium Development goals.

The updating of the National Ecotourism Strategy (NES) is very timely as it responds to the recent call of the United Nations under a resolution entitled "Promotion of ecotourism for poverty eradication and environment protection", for member countries to include in its plan and programs the development of ecotourism. We have a major role to play in the implementation of this UN directive and we are committed and ready to do our share.

The National Ecotourism Strategy 2013–2022 provides the road map to the Philippines' quest to gain a competitive chunk of the ecotourism market. This product will not only conserve our biodiversity, it will also help the local communities to have another source of income without going into unsustainable natural resources extraction activities.

Through the NES, we would like to see our tourists, both foreign and local, show their support for nature through the planting of endemic and indigenous trees in the ecotourism sites they visit, as part of their commitment to conserving and managing our natural areas. This is one of the strategies that the NES will pursue in order to enable visitors to help in greening our environment.

The participatory thrust of the new NES strongly supports the mandate of Department of Environment and Natural Resources (DENR) and will be a centerpoint to making sure that our very own local tourists will be the first to enjoy the natural beauty of our country and learn about the value of conserving these natural

resources. The long-term viability of this program would be nurtured through the strong partnership between the DENR, through the Biodiversity Management Bureau (formerly the Protected Areas and Wildlife Bureau or PAWB), and the Department of Tourism.

We look forward therefore to making the NES operational and provide benefits, not only to the communities through equitable opportunities for livelihood, but also for the environment thus enhancing the capital of our ecotourism development.

We congratulate all those who collaborated in the work to update the National Ecotourism Strategy.

RAMON J.P. PAJE
Secretary, DEPARTMENT OF ENVIRONMENT
AND NATURAL RESOURCES
Co-chairperson, NATIONAL ECOTOURISM
DEVELOPMENT COUNCIL



Message from DOT

One of the comparative advantages of the Philippines as a tourist destination is its good suite of attractive natural and cultural heritage assets and resources. This advantage, along with other positive attributes, guides stakeholders in developing an environmentally and socially responsible tourism program that delivers larger, more widely distributed income and employment opportunities.

In support of this goal, the Department of Tourism works in safeguarding the natural and cultural heritage and the sharing of the benefits of tourism in general to host communities and vulnerable groups. Priority is given to the design and implementation of product development programs targeting ecotourism at key natural heritage sites, and encouraging entrepreneurial communities to implement projects that provide sustainable benefits to their constituents.

The partnership with the Department of Environment and Natural Resources – Biodiversity Management Bureau (DENR-BMB), through the formulation of the National Ecotourism Strategy (NES), galvanizes the DOT's goal of ensuring sustainable tourism development in the country's top cluster destinations.

In its list of priority tourism product portfolio, DOT included the development and enhancement of nature-based tourism, where local communities and local entrepreneurs are given preference for wider distribution of economic benefits. Among DOT's initiatives to develop community-based tourism projects and programs are technical assistance in the development of self-sustaining businesses and micro enterprises; organization and capability-building workshops for the local tour guides; development of trekking and other eco-adventure products in the key ecotourism sites; and establishment of ecotourism information centers. These projects

contribute to the enhancement of the environmental sustainability of the tourism areas, as well as to the increase in income of the rural communities. More importantly, various community groups are able to operate viable and environmentally sustainable tourism enterprises in their respective areas.

The initiative to update the NES is laudable considering the necessary policy considerations and action plans identified after thorough consultations with the concerned stakeholders. The updated NES now has eight strategies all geared toward further promoting ecotourism, and sustaining the gains of the implementation of the previous NES.

The DOT is one with DENR-BMB in the goal of ensuring the preservation and conservation of our natural heritage, in order for our future generations to continue enjoying and experiencing the fun with nature and ecology.

RAMON R. JIMENEZ JR.
Secretary, DEPARTMENT OF TOURISM
Co-chairperson, NATIONAL ECOTOURISM
DEVELOPMENT COUNCIL





JOINT UNDERTAKING BY THE DEPARTMENT OF TOURISM (DOT) AND DEPARTMENT OF ENVIRONMENT AND NATURAL RESOURCES (DENR) SECRETARIES ON THE ADOPTION OF THE NATIONAL ECOTOURISM STRATEGY AND ACTION PLAN 2013-2022

WHEREAS, the National Ecotourism Steering Committee (NESC) and the Ecotourism Technical Working Group (ETWG) completed the drafting of the National Ecotourism Strategy (NES) and Action Plan 2013-2022 after undergoing the following process:

1. Regional Cluster Assessment Workshops on the implementation of the NES and Action Plan 2002-2012 and Planning Workshops held at different dates in 2012 and 2013;
2. Formulation and review of the draft NES and Action Plan 2013-2022 in 2013;
3. Regional Presentation and Validation Workshops for the finalization of the draft NES and Action Plan 2013-2022 in January 2014.

WHEREAS, the NES and Action Plan 2013-2022 will serve as framework to sustain ecotourism development in the country and provide the roadmap for the Philippines to gain a competitive chunk in the global ecotourism market;

WHEREFORE, foregoing premises considered, we as Secretaries of the DOT and DENR, the lead agencies in the implementation of the ecotourism program in the country, hereby adopt the NES and Action Plan 2013-2022 and commit to pursue the following:

1. Translate the NES and Action Plan 2013-2022 into a national work program through the National Ecotourism Steering Committee (NESC) and the Ecotourism Technical Working Group (ETWG);
2. Direct the DOT and DENR Regional Offices to mobilize the Regional Ecotourism Committees (REC) for the preparation of respective Regional Ecotourism Action Plans; and
3. Allocate budget in our respective agencies or mobilize fund from partners or donor agencies for the implementation of the various activities under the Action Plans.

ADOPTED this 19th day of February, 2014, at Radisson Blu, Cebu City, Philippines.
Hotel


RAMON J. PAJE
Secretary, Department of Environment
and Natural Resources


RAMON R. JIMENEZ, JR.
Secretary, Department of Tourism

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Acronyms & Abbreviations

ASEAN	Association of South East Asian Nations
ADB	Asian Development Bank
ATOP	Association of Tourism Officers of the Philippines
BIMP-EAGA	Brunei-Indonesia-Malaysia-Philippines East Asia Growth Area
BMB	Biodiversity Management Bureau
CALABARZON	Cavite-Laguna-Batangas-Rizal-Quezon
CAR	Cordillera Administrative Region
CD	Cluster Destinations
CHED	Commission on Higher Education
CI	Conservation International
DAP	Development Academy of the Philippines
DENR	Department of Environment and Natural Resources
DILG	Department of Interior and Local Government
DOT	Department of Tourism
DPWH	Department of Public Works and Highways
DTI	Department of Trade and Industry
ENRMP	Environment and Natural Resources Management Project
EO	Executive Order
ETWG	Ecotourism Technical Working Group
FGD	Focus Group Discussion
GDP	Gross Domestic Product
GEF	Global Environment Facility
GIZ	Gesellschaft für Internationale Zusammenarbeit
GREET	Grassroots Entrepreneurship and Employment in Tourism
GVA	Gross Value Added
HIETA	Hundred Islands Eco-Tour Association
HINP	Hundred Islands National Park
IPAF	Integrated Protected Area Fund
ICRMP	Integrated Coastal Resources Management Project

IEC	Information, Education and Communication
IP	Indigenous Peoples
JICA	Japan International Cooperation Agency
LGU	Local Government Unit
M&E	Monitoring and Evaluation
MRA	Mutual Recognition Agreement
NAIA	Ninoy Aquino International Airport
NCR	National Capital Region
NCIP	National Commission on Indigenous Peoples
NEDA	National Economic and Development Authority
NEDC	National Ecotourism Development Council
NEP	National Ecotourism Program/Project
NES	National Ecotourism Strategy
NESC	National Ecotourism Steering Committee
NGO	Non-Government Organization
NIPAS	National Integrated Protected Areas System
NSO	National Statistics Office
NTDP	National Tourism Development Plan
NZAID	New Zealand Agency for International Development
PA	Protected Area
PAHRDF	Philippines-Australia Human Resource Development Facility
PAMB	Protected Area Management Board
PASU	Protected Area Superintendent
PCVC	Philippine Convention and Visitor Center
PDP	Philippine Development Plan
PES	Payment for Ecosystem Services
PIDWWO	Pamilacan Island Dolphin and Whale Watching Organization
PO	Peoples' Organization
PPA	Philippine Ports Authority

PPP	Public–Private Partnership
PTPB	Philippine Tourism Promotions Board
RA	Republic Act
REC	Regional Ecotourism Committee
RETWG	Regional Ecotourism Technical Working Group
Ro-Ro	Roll-On/Roll-Off
SCOTIA	Sustainable Coastal Tourism in Asia
SGP	Small Grants Programme
SMDESEP	Small and Medium Enterprise Development for Sustainable Employment Program
SWOT	Strength, Weakness, Opportunity, Threat
TDA	Tourism Development Area
TESDA	Technical Education Skills and Development Authority
TEZ	Tourism Enterprise Zones
TIEZA	Tourism Infrastructure and Enterprise Zone Authority
TRE	Tourism Related Enterprises
TRIP	Tourism Roads Improvement Program
TVET	Technical Vocational Education Training
TWG	Technical Working Group
UN	United Nations
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
VFR	Visiting Friends and Relatives
WEF	World Economic Forum
WWF	World Wildlife Fund

BACKGROUND AND RATIONALE

The Bohol Ecotourism Congress of 1999 defines ecotourism as a form of sustainable tourism within a natural and cultural heritage area where community participation, protection and management of natural resources, culture and indigenous knowledge and practices, environmental education and ethics, as well as economic benefits, are fostered and pursued for the enrichment of host communities and satisfaction of visitors.

This definition provides the keystone for the formulation of the National Ecotourism Strategy 2002–2012, which establishes the ecotourism agenda for the Philippines, envisioning the ideals embodied in the Bohol Ecotourism Congress definition become a reality. EO 111 has mandated the formulation of the National Ecotourism Strategy 2002–2012, which aims to provide an integrated management plan for a comprehensive direction for ecotourism development in the Philippines. The NES was supported by a National Ecotourism Program and Action Plan, which was approved in 2001 and was implemented in 2002–2012.

With the completion of the planning period of the NES, it is imperative to update the NES and formulate one that would cover another 10 years, which could sustain the development of the ecotourism in the Philippines. Other key imperatives in updating the NES are the recently issued policies and plans that provide better frameworks for ecotourism development, offering fresher mandates to promote and implement ecotourism programs and projects. These include the new Tourism Law (Republic Act or RA 9593), the Philippine Development Plan (PDP), and the recently formulated National Tourism Development Plan (NTDP), among others.

The National Ecotourism Strategy 2013–2022 is complemented by an updated National Ecotourism Program and Action Plan covering three implementation periods: short-term (2013–2016), medium-term (2013–2018) and long-term (2013–2022).

The updating process for the NES was consultative and done through a series of Assessment and Planning Workshops in Luzon, Visayas, Mindanao, and the National Capital Region (NCR). Participants evaluated the strengths, weaknesses, opportunities, and threats of the NES and provided recommendations to maximize the strengths and opportunities, and minimize the weaknesses and threats.

ECOTOURISM MARKET TRENDS

International tourist arrivals grew by 4% in 2012 reaching 1 billion, with Asia and the Pacific showing the strongest results of 7% growth. This growth is expected to continue in 2013. UNWTO forecasts international tourist arrivals worldwide to increase by an average of 3.3% annually from 2010 to 2030 for a total of 43 million more international tourist arrivals annually, reaching 1.8 billion arrivals by 2030.

Ecotourism belongs to the category of “travel for leisure, recreation, and holidays,” which account for 51% (505 million) of all international tourist arrivals in 2011. Ecotourism is among the sectors expected to grow most quickly over the next two decades.

The Convention on Biological Diversity says that since the 1990s, ecotourism has grown to 20% to 34% per year. In 2004, ecotourism/nature tourism grew globally three times faster than the tourism industry as a whole. Meanwhile, nature tourism is growing at 10% to 12% per annum in the international market.

As for the domestic market, Philippine tourism has reached 4.3 million foreign tourists in 2012; according to the NTDP, this is projected to reach 10 million in 2016. In contrast, the number of domestic tourists reached 41 million in 2012 and is projected to reach 35 million in 2016.

The potential market size for ecotourism in the Philippines is in the range of 1,251,293 to 14,176,500 ecotourists. Financially, the potential gross earning from foreign ecotourism was from US\$81.2 million to US\$1.4 billion from 2013 to 2016. On the other hand, the potential earnings from domestic ecotourists could be from Php 9.5 billion to Php102 billion. Overall, the potential maximum earnings from ecotourism in Philippine Peso could reach Php157 billion by 2016.

To have an idea of the volume of tourists currently visiting ecotourism destinations in the Philippines, visitor counts in protected areas and other adventure destinations show that domestic and foreign visitors in over 200 protected areas under NIPAS averaged 778,008 annually for the period 2000 to 2012.

ECOTOURISM RESOURCES AND PRODUCTS

With over 7,000 islands, the natural resource base of the country for ecotourism consists of a diverse array of wetland, mountains, volcanoes, rugged cliffs, seascapes, coasts, beaches, lakes, forests, caves, fields, and a rich variety of plants and animals. As a “megadiversity” country, the Philippines offers one of the best destinations for ecotourism in Asia and the ASEAN region.

Ecotourism often combines cultural and natural resources in one product. In terms of cultural resource base, the key cultural resources for ecotourism include festivals and events, traditional villages, museums, handicrafts, arts and crafts, and local cuisine.

The NTDP has identified 78 tourist development areas (TDAs) and grouped them into 20 product-market thematic cluster destinations (CDs), which must be served by at least one or more air, sea, and road gateways.

TOURISM INFRASTRUCTURE, SERVICES, AND HUMAN RESOURCE OPPORTUNITIES AVAILABLE FOR ECOTOURISM

In accordance with the country’s prioritization of tourism as a major development program, the thrusts of the government for infrastructure, business, trade, and services have been aligned towards providing

basic requirements for expansion of tourism. The current infrastructure, services, and human resource opportunities in the tourism sector (i.e., existing and in the pipeline), particularly for ecotourism, include provision of transportation networks, tourism services, and human resources.

The country has 112 airports including ten international airports with NAIA, Cebu International Airport, and Davao International Airport as key gateways. There are five airlines operating domestically.

The country’s land transportation system consists of roads, railway, and transit systems. The Philippines has an extensive road system with about 200,000 kilometers of roads, although only about 80,000 kilometers are paved. This network of roads and bridges is currently being improved through the Tourism Roads Improvement Program (TRIP) under the DOT–DPWH Convergence Program.

For sea transport, Manila and Cebu are hubs of inter-island shipping, with various ports of call in Luzon, Visayas, and Mindanao. The 919-kilometer Nautical Highway is an integrated set of roads and ports connecting the country’s three major islands. It facilitates travel throughout the archipelago using an alternative Roll-On/Roll-Off (Ro-Ro) transport.

The supply of hotel accommodation for 2012 was 162,403 nationwide, with 15,030 in the pipeline,

bringing the total to 177,433. The planned expansion is for an additional 10,518. It is forecasted that by 2016, the total supply will be 187,951.

Throughout the country, in 2013, there were 750 DOT-accredited tour operators/travel agencies, 835 tour guides, 301 tourist transport operators and 315 TREs consisting of restaurants, tourism training centers, rest areas, tourist shops, zoos, tourism recreation centers, galleries, agri-tourism sites, tourism entertainment complex, and health and wellness services.

In terms of economic impact and employment, in 2012, total visitor receipts amounted to Php 160 billion with tourism Gross Value Added (GVA) of Php 631 billion. The tourism share to the country's GDP was 5.97%. Employment in tourism totaled 4.2 million, or 11.3% share of total employment, as of 2012.

Tourism education and training in the Philippines has been rationalized, with the formal educational courses being guided by the Commission on Higher Education (CHED) and the non-formal education or vocational courses guided by the Technical Education and Skills Development Authority (TESDA).

HIGHLIGHTS OF NES AND ACTION PLAN 2002–2012 ACCOMPLISHMENTS

The formulation of the NES and Action Plan 2002–2012 was one of the components of the first National Ecotourism Project (NEP I) funded through a grant from NZAID and jointly implemented by DOT and DENR. Implemented from 2000 to 2004, NEP I jumpstarted the initial component activities under the NES. Aside from the NES, the significant outcomes of NEP I included the strengthening of the EO 111 bodies, development of ecotourism products in four pilot sites, assessment of all key ecotourism sites identified in the NES, development of an ecotourism website, publication of quarterly newsletters on ecotourism, and the ecotourism fund study.

NZAID continued the NEP project with a second phase (NEP II) from 2004 to 2009, this time providing grant funds for the implementation of key activities in the action plan of the NES and expanding the development of ecotourism projects to four protected areas, in addition to the pilot sites in NEP I. The overall goal was to mainstream ecotourism into community-based resource management to help improve livelihood and manage natural and cultural resources in a sustainable manner.

The positive results and outcomes of NEP II include: (a) establishment of income-generating projects among disadvantaged groups; (b) expansion of

employment opportunities and community income generation; (c) improvements in sustainable resource management and reduction in unsustainable activities; (d) development of training modules in ecotourism; (e) development of the DOT Ecotourism Standards; and (f) implementation of a number of ecotourism-focused marketing initiatives by DOT.

The various impacts of the NEP have been recorded in the economic, social, environmental, indigenous peoples and gender, and institutional aspects. Some of the good practices observed in the NEP include (a) organizing out-of-school-youth to operate and manage an ecotourism enterprise; (b) partnering with key stakeholders like LGUs and local communities or peoples' organizations (POs); and (c) involvement of women and indigenous peoples.

Lessons learned sessions were gathered through broader stakeholder intervention/participation, gender and indigenous people's involvement, sustainability and capacity building, social preparation, project administration and management, and sustainability.

During the timeframe of NES and Action Plan 2002–2012, other ecotourism initiatives in the form of plans, programs, and projects were implemented by various tourism players like private entrepreneurs, local government units, and other government agencies, with funding assistance from donors and private financing institutions.

The implementation of NES 2002–2012 and ecotourism development in general was premised on the concerted efforts of concerned stakeholders including the government, private sector, civil society and the host communities. In the course of NES implementation, several issues have constrained ecotourism development such as inadequate funds; lack of carrying capacity studies, development plans, and business plans; non-dissemination of NES; irregular holding of meetings by EO 111 bodies; absence of M&E; and the need to translate the NES into regional action plans.

NES AND ACTION PLAN 2013–2022

The vision of the NES is: *“The Philippines as a globally competitive ecotourism destination with its wealth of natural beauty and cultural richness, conscious of the need to conserve, enhance, sustain and develop these assets and ensure equitable sharing of benefits among its people.”*

The goal of the NES is: *“Environmentally and socially responsible ecotourism development that safeguards the integrity and diversity of its natural resources, provides education and enjoyment to visitors and delivers larger and more widely distributed income and employment opportunities to the local communities and their constituents, especially the women, youth, indigenous peoples, and other vulnerable groups.”*

Consistent with the strategic directions of the NTDP, NES 2013–2022 requires strong cohesion among ecotourism stakeholders so as to pursue inclusive growth in the development of ecotourism sites and destinations networked within the identified clusters of tourism development. The formulation of these new strategic goals adheres to the current and future needs on the development of ecotourism.

The overall goal of the NES is to develop and manage globally competitive ecotourism sites, products and markets that will contribute to inclusive growth. This is to be achieved by way of the following eight strategies:

- STRATEGY 1: Developing and marketing diversified and competitive ecotourism products
- STRATEGY 2: Creating conducive environment for ecotourism investments
- STRATEGY 3: Maximizing economic benefits for the host communities
- STRATEGY 4: Promoting and developing a culture of ecotourism
- STRATEGY 5: Strengthening institutional capacity
- STRATEGY 6: Developing and strengthening partnerships
- STRATEGY 7: Establishing mechanisms for sustainable financing
- STRATEGY 8: Monitoring outcomes and impacts

Site selection for ecotourism development aims to ensure that there is efficacy, focus, and concerted effort. Selection is based on a set of criteria that conform to the elements of ecotourism, such as natural areas, community participation, quality of visitor experience, and educational value. Attributes for site selection include: physical attributes (50%), ecotourism products (10%), social preparedness (10%), cultural features (8%), ecotourism services (6%), market (6%), accessibility (5%), and institutional aspect (5%).

The action plan is presented in Gantt chart showing the activities, timetable, responsibility centers, and indicators for each of the eight strategies. The timetable is reflected in short term (2013–2016), medium term (2013–2018), and long term (2013–2022).

The institutional framework for the development of ecotourism include the stakeholders who are grouped into the public sector (government), private sector, multilateral and bilateral agencies, non-government organizations (NGOs), and communities. The institutional arrangements for the implementation of NES, as well as oversight over the general development of ecotourism in the country, are anchored on the instituted EO 111 bodies that are expected to conduct regular meetings and discuss on issues, monitor progress of NES implementation, and provide policy directions.

The monitoring and evaluation (M&E) framework aims to establish an ecotourism database to help monitor the effectiveness of the NES and the various ecotourism programs and projects; evaluate the impacts; and provide inputs for future planning and in the development marketing programs. Elements of the M&E framework include the establishment of a baseline information and database, periodic progress monitoring, and impact monitoring using selected indicators.



APO REEF NATURAL PARK, OCCIDENTAL MINDORO (PHOTO BY DENR-BMB/GEORGE TAPAN)

I. Introduction

BACKGROUND AND RATIONALE

The Bohol Ecotourism Congress of 1999 has adopted the definition of “ecotourism”, which was then used for the National Ecotourism Strategy 2002–2012: ecotourism is a form of sustainable tourism within a natural and cultural heritage area where community participation, protection and management of natural resources, culture and indigenous knowledge and practices, environmental education and ethics, as well as economic benefits are fostered and pursued for the enrichment of host communities and satisfaction of visitors.

This definition clearly established that in the Philippine context, ecotourism will take place in both natural and cultural heritage areas that require careful management. The activities associated with ecotourism will contribute to environmental education, including fostering awareness of environmental problems. Developing ecotourism will involve the empowerment of local communities to participate in and benefit from tourism. Ecotourism will also provide visitor satisfaction. In this light, the National Ecotourism Strategy 2002–2012 established the ecotourism agenda for the Philippines, which also envisioned to actualize the ideals embodied by the definition adopted in the Bohol Congress.

The formulation of the National Ecotourism Strategy for 2002–2012 was mandated by Executive Order (EO) 111 to provide an integrated management plan that shall warrant a comprehensive direction for the future of ecotourism in the Philippines. It should recognize the issues and problems for its sustainable development and recommend feasible approaches to address these issues and concerns. EO 111 also requires that the NES be formulated in consultation with stakeholders in the environment

and tourism sectors including indigenous peoples and communities affected by ecotourism development.

The key imperatives to be addressed by the NES include:

- Diversification of the Philippine tourism product mix in the light of market demands;
- Spreading tourism benefits to rural areas for employment generation and poverty alleviation, and for the sustainability of the tourism sector;
- Provision for an economic incentive for conservation of natural and cultural sites to ensure sustainability of conservation management systems;
- Promotion of recreation in natural areas and engendering conservation awareness programs for out-of-the-classroom education; and
- Creation of models demonstrating local community involvement in sustainable use of natural resources.

The NES was complemented by the National Ecotourism Program, which consists of key components covering the following major aspects of ecotourism development:

- Development, management, and protection of identified ecotourism sites;
- Product enhancement and development;
- Marketing and promotion;
- Establishment of an ecotourism fund;
- Environmental education and information campaign;
- Support programs for community stewardship and

livelihood development; and

- Monitoring and evaluation (M&E)

The NEP was supported by an Action Plan in the short-term (2002-2004), medium-term (2002-2007) and long-term (2002–2012). The NES was approved in 2001 and was implemented from 2002 to 2012.

The planning period of the NES has been completed; it is imperative to formulate and update the NES to cover another 10 years, which is aimed to sustain the development of ecotourism in the country.

Updating the NES required an assessment of the its accomplishments to determine whether it was effective and if adjustments were needed.

Since its implementation, policy and institutional changes have also been implemented, which could substantially affect the efficacy of the NES. For example, the new Tourism Act (RA 9593), Philippine Development Plan (PDP), and National Tourism Development Plan (NTDP) all have direct bearing on the NES sustainability. The PDP outlines the government's strategy and agenda to make tourism globally competitive. The NTDP lays down the geographical tourism clusters and development areas where ecotourism can be developed. The Tourism Act sets out the cooperating framework between DOT and DENR in identifying and developing ecotourism sites. These policy imperatives form the bases of NES 2013–2022.

The National Ecotourism Strategy 2013–2022 is complemented by an Action Plan covering three implementation periods: short-term (2013–2016), medium-term (2013–2018) and long-term (2013–2022).

PLANNING PROCESS

A series of regional cluster assessment and planning workshops were held in Luzon, Visayas, and Mindanao, and a national workshop in NCR. Consultation workshops were held in:

- Subic Bay Freeport Zone (October 29–30, 2012) for Regions 1, 2, 3, and CAR;
- Quezon City (November 15–16, 2012) for Regions 4A, 4B, 5, and NCR;
- Bacolod City (October 22–24, 2012) for Regions 6, 7, and 8; and
- Cagayan de Oro City (November 20–21, 2012) for Regions 9, 10, 11, 12, 13, and ARMM.
- NCR (December 6, 2012) for the National Consultation

In these consultations, NES 2002–2012 underwent SWOT analysis. Recommendations were developed to maximize the strengths and opportunities and minimize the weaknesses and threats.

A final round of consultations was undertaken in January 2014 with four cluster workshops held to present the final draft. and a final meeting with DENR and DOT officials was also done to consolidate the final comments on the updated NES. The NES 2013–2022 was approved by the DENR and DOT Secretaries in February 2014.

POLICY CONTEXT

As mentioned earlier, recent policy developments have prompted the need to update the NES, hence providing more solid mandates for ecotourism development. Aside from previous policies, the following policies and plans are reflected in NES 2013–2022. These provided the rationale for the institutional framework, revised strategies, and timely action plan of NES.

REPUBLIC ACT NO. 9593 (TOURISM ACT OF 2009).

The new tourism law directed, among others, the formulation of a new tourism development plan and a reorganization of the DOT creating the TIEZA and the Tourism Development Fund. For ecotourism, it sets out the cooperating framework between DOT and DENR in identifying and developing ecotourism sites.

Specifically, Section 33 states, “The DOT in coordination with DENR shall identify areas covered by NIPAS with ecotourism potential and cultural heritage value, and prepare policies, plans and programs for their development, preservation, operation or conversion into TEZs.”

PHILIPPINE DEVELOPMENT PLAN 2011–2016. This identifies tourism as a priority sector for development given its high growth and job generation potentials. GDP share of tourism averaged 6% in 2004–2009, while average share in total national employment was about 10% for the same period. Tourism is regarded as the fourth largest contributor to foreign exchange receipts. The PDP has a 10-point agenda to make the country's industry and services sector (including tourism) globally competitive and innovative, and contribute to inclusive growth and employment generation.

Among the key PDP agenda related to tourism are: (a) formulation of a national tourism development plan as the framework for the identification of tourism destinations and products, domestic and international markets, marketing and promotion, and prioritization of tourism infrastructure requirements; (b) diversification of existing destinations, and creation of new tourism areas and products including the expansion in room capacities; and (c) encouraging LGUs to develop tourism-related products and services using community-based and ecotourism approaches.

NATIONAL TOURISM DEVELOPMENT PLAN 2011–2016. This includes ecotourism under “nature-based tourism products,” one of the nine product portfolios for Philippine tourism. Nature-based tourism is a product that embraces nature-based recreational and educational activities, as well as land- and marine-based adventure activities.

The NTDP identifies 78 existing and emerging tourism development areas (TDAs) grouped into 20 product–markets thematic tourism cluster destinations (CDs), each of which is served by at least one or more air, sea, and road gateways. In these clusters, priority actions are given to designing and implementing a product development program targeting ecotourism at 50 key natural heritage sites. The top nine cluster destinations in order of importance are: Central Visayas, Metro Manila and CALABARZON, Central Luzon, Palawan, Western Visayas, Davao Gulf and Coast, Northern Mindanao, Bicol, and Laoag–Vigan.

DENR ADMINISTRATIVE ORDER 2013-19: GUIDELINES ON ECOTOURISM PLANNING AND MANAGEMENT IN PROTECTED AREAS. The guidelines apply to protected areas under the National Integrated Protected Areas System (NIPAS), setting out the systematic process for ecotourism planning and management in these areas: from site assessment to planning, then from implementation to M&E.

The guidelines also incorporate components for business planning and strategies which include visitor use zoning, visitor site planning and design, sustainable infrastructure design, visitor management and revenue generation.

DENR ADMINISTRATIVE ORDER 2009-09: STANDARD DESIGN AND SPECIFICATIONS OF SIGNS, BUILDINGS, FACILITIES AND OTHER INFRASTRUCTURE THAT MAY BE INSTALLED AND/OR CONSTRUCTED WITHIN PROTECTED AREAS.

The guideline prescribes the establishment of uniform signs for protected areas (PAs) including appropriate symbols; the designs and specifications and materials for buildings and other vertical infrastructure in PAs, the standards for planning of facilities in PAs and other ecotourism areas; and enhancement of visitor management programs for ecotourism and conservation purposes.

RULES AND REGULATIONS TO GOVERN THE ACCREDITATION OF ECOGUIDES, ECOTOURS, ECOLOGES AND ECOTOUR FACILITIES. One of the key policy outputs of the NES 2000–2012, these rules and regulations issued by DOT contain the comprehensive guidelines for accrediting ecoguides, ecotours, ecolodges, and ecotour facilities. It stipulates the standard requirements for accreditation, including fees, enforcement protocols, compliance monitoring, and grounds for cancellation.

REPUBLIC ACT NO. 10629 (PROVIDING FOR THE RETENTION BY THE PAMB OF 75% OF REVENUES ACCRUING TO IPAF). This law mandates that 75% of protected area revenues will be directly retained by the PAMB. This is an important law because it now provides funding directly for protected area management programs and projects including ecotourism.



CAPISAAN CAVE, NUEVA VIZCAYA (PHOTO BY DENR-BMB/GERARDO LITA)

II. Situationer

ECOTOURISM MARKET TRENDS

Global Situation

The world market for ecotourism is growing fast. To determine the magnitude of this market potential, we can refer to current trends on global tourism.

International tourist arrivals grew by 4% in 2012 reaching 39 million higher than in 2011. Emerging economies had the fastest growth of over 4% followed by advanced economies with more than 3%. Asia and the Pacific showed the strongest results with 7% growth and is expected to continue in 2013 based on the UNWTO's long-term forecast. The number of international tourist arrivals worldwide is expected to increase by an average of 3.3% annually from 2010 to 2030. This represents an additional 43 million international tourist arrivals every year, reaching a total of 1.8 billion arrivals by 2030.

In 2011, travel for leisure, recreation, and holidays in which ecotourism was lumped, accounted over half of all international tourist arrivals (51% or 505 million) .

In the same year, international tourism receipts reached a record of US\$ 1,030 billion from 927 billion in 2010. This represents a 3.9% growth in real terms (adjusted for exchange rate fluctuations and inflation).

As cited by the Convention on Biological Diversity, ecotourism has grown 20% to 34% per year since the 1990s. In 2004, ecotourism/nature tourism grew three times

faster than the tourism industry as a whole. Meanwhile, nature tourism has grown 10% to 12% per annum in the international market.

Ecotourism is among the sectors expected to grow most quickly over the next two decades. UNEP and CI say that most of tourism's expansion occurs in and around the world's remaining natural areas. Sustainable tourism could grow to 25% vis-a-vis the world's travel market within six years, taking the value of the sector to \$473.6 billion a year. (Source: www.cbd.int)

In contrast to general mass tourism, the global ecotourism market offers varied niches like "rural tourism" and "geotourism" (i.e., deals with non-living parts of the natural environment, such as geological features, landforms and land processes, and other nature-based products).

Philippine Situation

Philippine tourism has accommodated 4.3 million foreign tourists in 2012. The National Tourism Development Plan for 2011–2016 has projected that this number could reach 10 million by the end of 2016. On the other hand, the number of domestic tourists reached 41 million in 2012 and is projected to reach 35 million in 2016.

Statistics for Philippine ecotourism is somewhat limited; however, estimates can be derived from existing data gathered, specifically the survey, "Main

Motivation in Choosing the Philippines by Country Market" conducted in January to December 2011. In this survey, the three "motivation categories" that may refer directly to ecotourism are: (1) natural beauty/scenic attractions; (2) attractive beaches; and (3) opportunities for sports/recreation/adventure. About 2% of the survey respondents say these three categories were their main motivations in visiting the Philippines.

Using these bases as estimates, the projected range of ecotourists in the Philippines could be from 2% to 20% of the projected foreign tourist arrivals in the country as cited by the NTDP 2011–2016. The NTDP projects that the total foreign tourist arrivals will reach 6 million in 2013; 7 million in 2014; 8.4 million in 2015; and 10 million in 2016. The estimated projections for foreign ecotourists range from 118,320 to 200,000 (low assumption) and 1,183,215 to 2,000,000 (high assumption) (Table 1).

Meanwhile, the estimation for domestic ecotourists can be based on the report, "Number and Percent Distribution of Domestic Travelers by Sex and Main Purpose of Trip, Philippines: 2009," sourced from a survey conducted by NSO–DOT in 2009 entitled "Household Survey on Domestic Visitors."

For the low estimate of 3.6%, the purpose category of "Study/Training/Exchange Program" is used since many studies are being conducted in ecotourism sites in the Philippines. For the high estimates of 34.3%, the

purpose category of “Pleasure/Vacation” is used in reference to the volume of domestic travelers who visit natural attractions, including ecotourism sites.

Thus, the projected range of domestic ecotourists is from 3.6% to 34.3% of the total future domestic tourists in the Philippines from 2013 to 2016 using the projections of the National Tourism Development Plan (2011–2016). The NTDP forecasts the total domestic tourists would reach 31.47 million in 2013; 32.76 million in 2014; 34.1 million in 2015; and 35.5 million in 2016. The estimated potential domestic ecotourists range from 1,132,969 to 1,278,001 (low assumption) and 10,794,695 to 12,176,498 (high assumption) (Table 2).

While the above projections are mere estimates of potential market size for ecotourism sites in the Philippines, for purposes of updating, these data were incorporated into the NES 2013–2022. These estimates of potential visitor arrivals are dependent on the current trends in the Philippine tourism market in general. Accordingly, regions expecting large regular tourism arrivals could expect more ecotourists as they already have accessibility and support mechanisms, which enables them to host more ecotourists.

Using Tables 1 and 2, the potential volume of the foreign ecotourist market for 2013–2016 shall be 118,320 to 200,000 (low assumption) and 1,183,215 to 2,000,000 (high assumption). For domestic ecotourists, the likely market could be 1,132,969

to 1,278,001 (low assumption) and 10,794,695 to 12,176,498 (high assumption). Overall, the potential market size for ecotourism in the Philippines is in the range of 1,251,293 to 14,176,500 ecotourists. Domestic visitors have traditionally outnumbered foreign tourists because Filipinos usually combine family activities/events with travels to nearby ecotourism sites; they also do not demand much in terms of accommodations and other features compared to international travelers.

Financially, given the NTDP’s foreign tourists profile of average length of stay of 8.21 nights and average expenditure per day of US\$ 83.59, the potential gross earnings from foreign ecotourism could be from US\$ 81.2 million to US\$ 1.4 billion for 2013 to 2016, respectively. On the other hand, the NTDP’s domestic tourist’s profile of average length of stay per trip of 4.0 nights and average expenditure per trip of Php 8,357 means that potential earnings from domestic ecotourists could be from Php 9.5 billion to Php 102 billion. The potential maximum earnings from ecotourism in Philippine peso terms could reach Php 157 billion by 2016.

Overall, opportunities in ecotourism grow as arrivals continue to increase and income base enlarges to the benefit of the whole Philippine economy.

Table 1. Potential Foreign Ecotourists

REGIONS	LOW ASSUMPTION				HIGH ASSUMPTION			
	2013	2014	2015	2016	2013	2014	2015	2016
NCR (National Capital Region)	41,330	49,233	58,647	69,861	413,303	492,331	586,470	698,609
CAR (Cordillera Autonomous Regions)	2,063	2,457	2,927	3,487	20,630	24,575	29,274	34,871
Region I (Ilocos Region)	529	631	751	895	5,293	6,306	7,511	8,948
Region II (Cagayan Valley)	723	861	1,026	1,222	7,231	8,614	10,261	12,223
Region III (Central Luzon)	3,568	4,251	5,063	6,032	35,683	42,506	50,634	60,316
Region IV-A (CALABARZON)	8,041	9,578	11,410	13,592	80,409	95,784	114,098	135,915
Region IV-B (MIMAROPA)	4,050	4,824	5,746	6,845	40,497	48,240	57,464	68,452
Region V (Bicol Region)	16,376	19,507	23,237	27,680	163,756	195,068	232,368	276,799
Region VI (Western Visayas)	12,382	14,750	17,570	20,930	123,824	147,500	175,704	209,301
Region VII (Central Visayas)	23,982	28,568	34,030	40,537	239,821	285,678	340,302	405,372
Region VIII (Eastern Visayas)	583	695	827	986	5,831	6,946	8,274	9,856
Region IX (Zamboanga Peninsula)	135	161	191	228	1,350	1,608	1,915	2,281
Region X (Northern Mindanao)	2,087	2,486	2,962	3,528	20,873	24,865	29,619	35,282
Region XI (Davao Region)	1,451	1,729	2,059	2,453	14,514	17,289	20,595	24,532
Region XII (SOCCSARGEN)	97	115	138	164	969	1,155	1,376	1,639
Region XIII (CARAGA)	923	1,100	1,310	1,560	9,231	10,996	13,099	15,604
TOTAL	118,320	140,946	167,894	200,000	1,183,215	1,409,461	1,678,964	2,000,000

Table 2. Potential Domestic Ecotourists

REGIONS	LOW ASSUMPTION				HIGH ASSUMPTION			
	2013	2014	2015	2016	2013	2014	2015	2016
NCR (National Capital Region)	53,742	55,944	58,236	60,622	512,043	533,020	554,857	557,588
CAR (Cordillera Autonomous Regions)	46,486	48,391	50,373	52,437	442,911	461,056	479,945	499,607
Region I (Ilocos Region)	26,300	27,377	28,499	29,666	250,577	260,843	271,529	282,653
Region II (Cagayan Valley)	37,150	38,672	40,256	41,905	353,956	368,457	383,552	399,265
Region III (Central Luzon)	83,918	87,356	90,935	94,661	799,556	832,312	866,410	901,905
Region IV-A (CALABARZON)	271,983	283,126	294,725	306,799	2,591,397	2,697,561	2,808,075	2,923,116
Region IV-B (MIMAROPA)	38,718	40,305	41,956	43,675	368,900	384,013	399,745	416,122
Region V (Bicol Region)	143,922	149,818	155,956	162,345	1,371,257	1,427,435	1,485,914	1,546,789
Region VI (Western Visayas)	101,722	105,890	110,228	114,744	969,189	1,008,895	1,050,227	1,093,253
Region VII (Central Visayas)	83,129	86,535	90,080	93,771	792,038	824,486	858,263	893,425
Region VIII (Eastern Visayas)	18,214	18,960	19,737	20,545	173,539	180,648	188,049	195,753
Region IX (Zamboanga Peninsula)	24,081	25,068	26,095	27,164	229,442	238,841	248,626	258,812
Region X (Northern Mindanao)	85,076	88,561	92,189	95,966	810,581	843,789	878,358	914,342
Region XI (Davao Region)	47,927	49,890	51,934	54,062	456,635	475,342	494,816	515,087
Region XII (SOCCSARGEN)	36,360	37,850	39,400	41,015	346,431	360,624	375,398	390,777
Region XIII (CARAGA)	34,241	35,644	37,104	38,624	326,243	339,608	353,521	368,004
TOTAL	1,132,969	1,176,387	1,227,703	1,278,001	10,794,695	11,263,930	11,697,285	12,176,498

Protected Area Visitors

Visitor counts in natural parks and other ecotourism destinations were taken into consideration to have an idea of the volume of tourists currently visiting protected areas. Latest statistics from BMB show that domestic and foreign visitors in over 200 protected areas under NIPAS averaged about 25,235 foreign tourists and 636,793 local tourists per year from 2000 to 2010. For the same period, the average total number of visitors, both foreign and domestic, was 778,008 annually (Table 3). This translates to the average annual earnings of Php14 million from visits to the protected areas in 2000–2010.

ECOTOURISM RESOURCES AND PRODUCTS

The Philippines is the world's second largest archipelago with over 7,000 islands. The natural resource base of the country for ecotourism consists of an outstanding and diverse array of wetland, mountains, volcanoes, rugged cliffs, seascapes, coasts, beaches, lakes, forests, caves, fields, and a rich variety of plants and animals. The Philippines ranks fifth worldwide in terms of number of endemic animals; it also ranks 25th in terms of plant richness. As a “megadiversity” country, the Philippines offers one of the best destinations for ecotourism in Asia and the ASEAN region as shown in Table 4.

Mountains, volcanoes, and forests in the country range from accessible forested areas in Luzon and in Mindanao. Coastal and marine attractions in the Philippines are known internationally, and many are now considered world-class ecotourism destinations. Coastal-based ecotourism products include SCUBA diving, snorkeling, sea kayaking, and marine mammal viewing. Beach-based products are already famous, with Batangas, Cebu, and Palawan as the core of beach-based ecotourism. Lakes and wetlands in the Philippines are important feeding and wintering grounds for migratory birds from Mainland Asia and Australia, and hence provide ecotourism products like bird-watching, research, and cultural activities. River running is an increasingly important activity in many major rivers in the country. Caves are also found throughout the country and are even popular among local tourists. The recent inclusion of the Puerto Princesa Underground River as one of the Seven Wonders of Nature has drawn large foreign and local tourists to the site.

Ecotourism often combines cultural and natural resources in one product. The key cultural resources for ecotourism are festivals and events, traditional villages, handicrafts, arts and crafts, and local cuisine. These illustrate the key roles that resources play in the celebration of Filipino culture with respect to the bounties provided by nature.

Table 3. Total Visitors in Protected Areas of the Philippines for 2000-2010

YEAR	NUMBER OF VISITORS						TOTAL NUMBER OF VISITORS	INCOME GENERATED
	LOCAL			FOREIGN				
	MALE	FEMALE	TOTAL	MALE	FEMALE	TOTAL		
2000	301,679	262,007	563,686	5,447	4,335	9,732	573,468	5,725,618
2001	366,678	245,165	611,843	4,324	3,672	7,996	619,839	7,334,646
2002	377,026	287,023	664,049	4,475	3,752	8,232	672,281	13,179,350
2003	340,215	252,796	593,011	4,693	3,397	8,090	601,101	15,307,509
2004	336,532	225,637	586,728	6,639	4,809	15,261	637,349	13,752,112
2005	419,069	347,589	773,556	12,574	6,839	24,043	797,599	15,785,645
2006	345,984	288,027	634,011	8,450	7,373	15,823	649,730	15,046,791
2007	403,189	337,317	740,506	8,775	7,745	16,470	756,976	9,204,381
2008	415,136	389,562	803,116	27,930	15,829	43,759	846,875	17,175,024
2009	416,066	350,788	766,854	26,460	22,385	48,642	815,496	25,382,496
2010	402,349	391,145	793,494	38,607	32,815	71,422	864,916	21,011,865

SOURCE OF BASIC DATA: BMB-DENR

Table 4. Ecotourism Resources and Products Available in the Philippines

NATURAL AREAS/RESOURCES	Mountains, Volcanoes, Hills, Forests, Caves, Karst Formations, Marshes, Lakes, Rivers, White Beaches, Mangroves, Coral Reefs Flora and Fauna, Landscapes, Seascapes
CULTURE/TRADITION	Festivals, Fiestas, Cuisine, Historical Sites, Archeological Sites, Rituals, Costumes
PRODUCTS/ACTIVITIES	Mountaineering/Trekking, Hiking, Spelunking, Biking, Bird-watching, Whitewater Rafting, Kayaking, Scuba Diving, Snorkeling, Dolphin-/Whale-/Whaleshark-watching, Firefly-watching, Research

The NTDP has identified 78 TDAs grouped into 20 product-market thematic cluster destinations (CD) that must be served by at least one air, sea, and road gateways. The top nine cluster destinations are Central Visayas, Metro Manila and CALABARZON, Central Luzon, Palawan, Western Visayas, Davao Gulf and Coast, Northern Mindanao, Bicol, and Laoag–Vigan. These clusters are given priority in terms of design and implementation of product development programs. In particular:

1. Ecotourism at key 50 natural heritage sites;
2. Cultural tourism at 44 key cultural heritage sites;
3. Leisure and entertainment centers in the vicinity of the international airports at Mactan–Cebu, Clark–Subic, Puerto Princesa, Iloilo, Davao City, Cagayan de Oro City, Legaspi City, and Laoag;
4. Integrated resorts within a two-hour travel time from international airports at Mactan–Cebu, Bohol–Panglao Island, Subic–Zambales, La Union, Batangas/Cavite, Laoag–Pagudpud, Puerto Princesa–El Nido–San Vicente, Boracay–Aklan–Northern Antique, Guimaras Island, Samal Island, and in Misamis Oriental near Laguindingan International Airport; and
5. A cruise hub for training and maintenance at Subic Bay; major integrated cruise hubs in Manila Bay and Cebu; and port-of-call jetties and terminals at key points such as Coron, Puerto Princesa, El Nido, Puerto Galera, Romblon, Caticlan, Iloilo, Bohol, Dumaguete, and other points deemed vital and appropriate as a port hub.

TOURISM INFRASTRUCTURE, SERVICES AND HUMAN RESOURCE OPPORTUNITIES AVAILABLE FOR ECOTOURISM

In accordance with the country's prioritization of tourism as a major development program, the thrusts of the government in terms of infrastructure, business, trade, and services have moved towards providing basic requirements and expansion for tourism. The Philippine Development Plan has outlined a comprehensive infrastructure program to support the tourism industry to make it more globally competitive. The current infrastructure, services, and human resource opportunities in the tourism sector made available and in the pipeline for ecotourism are discussed in this succeeding sections.

Transportation

AIR TRANSPORTATION. The country has 112 airports. It also has 10 international airports: Ninoy Aquino International Airport (Manila), Mactan–Cebu International Airport (Cebu City), Francisco Bangoy International Airport (Davao City), Diosdado Macapagal International Airport (Clark Special Economic Zone, Pampanga), Subic Bay International Airport (Subic Bay Freeport Zone, Zambales), Laoag International Airport (Laoag, Ilocos Norte), General Santos International Airport (General Santos City), Zamboanga International Airport (Zamboanga City), and the secondary international airports of Puerto Princesa Airport and Kalibo Airport.

There are five airlines operating domestically: PAL Express (Air Philippines), Air Asia Philippines (Zest Air), Cebu Pacific, Sea Air Tiger, and Philippine Airlines.

LAND TRANSPORTATION consists of roads, and railway networks, and transit systems. The Philippines has an extensive road system with about 200,000 kilometers of roads. The rail system in the country is antiquated and of limited use by only a few people. Other modes of land transportation for commuters include buses, taxis, trains, pedicabs, horse-drawn carriages, and the popular and colorful jeepneys.

The implementation of the DPWH–DOT Convergence Program for roads and infrastructure to support tourism is underway to improve and expand the transportation network in the country for tourism. The program called Tourism Road Infrastructure Project (TRIP) includes the upgrading of roads (from gravel to concrete), road widening, slope protection of roads leading to tourism destinations and ecotourism sites, and bridge construction. For 2013, a total of 167 road projects totaling 598 kilometers have been prioritized; the budget allocation is Php 12 billion.

SEA TRANSPORTATION. Both Manila and Cebu are hubs of inter-island shipping. The Port of Manila is a major international harbor with three areas: North

Harbor, which serves the inter-island vessels; South Harbor, for international shipping; and the Manila International Container Terminal. However, Cebu City has more inter-island ships at its ports. The PPA recommended ports-of-call be:

- Luzon: South Harbor (Manila), Poro Point (San Fernando City), Batangas Port (Batangas City), and Subic Bay Freeport (Zambales)
- Palawan: Coron Port, El Nido Port, and Puerto Princesa Port
- Visayas: Cagban Jetty Port (Boracay), Cebu Port (Cebu City), Iloilo Port (Iloilo City), and Catagbacan Port (Bohol)
- Mindanao: Davao Port (Davao City), Cagayan de Oro Port (Cagayan de Oro City), and Siargao Port (Surigao del Norte)

“NAUTICAL HIGHWAY.” The Nautical Highway is an integrated set of roads and ports connecting Luzon, Visayas, and Mindanao; it offers an efficient and shorter way to travel to Visayas and Mindanao through the western seaboard. For tourists and travelers, the Nautical Highway allows them to hop from one island to another and enjoy the scenery of the country in the comfort of their cars. It facilitates travel of tourists from one destination to another using an alternative Roll-On/Roll-Off (Ro-Ro) transport. The 919-kilometer Nautical Highway is composed of three major routes: Western Nautical Highway, Central Nautical Highway, and Eastern Nautical Highway.

Accommodation

The supply of accommodation for 2012 was 162,403 nationwide; with 15,030 in the pipeline, this brings the total to 177,433. Planned expansion covers an additional 10,518. It is forecasted that by 2016, the total supply will be 187,951 (Table 6). There are 699 hotels, tourist inns, apartels, pension houses, resorts, homestays, ecolodges and motels accredited nationwide as of December 2013.

Travel Services

The number of accredited tour operators/travel agencies and tour guides in the Philippines is presented in Table 6.

TREs consist of restaurants, tourism training centers, rest areas, tourist shops, zoos, tourism recreation centers, galleries, agri-tourism sites, tourism entertainment complex, and health and wellness services.

It should be noted that there has been an increase in the accreditation of tourism services in key areas for ecotourism like Palawan and Bohol.

Employment/Jobs Created/Economic Impact

For 2012, the total visitor receipts amounted to Php 160 billion with tourism Gross Value Added (GVA) of

Php 631 billion; the tourism share to the country's GDP was 5.97%. Employment in tourism totaled 4.2 million, an 11.3% share of total employment in 2012.

With the new DOT-led program to improve the Philippines' ranking in the World Economic Forum (WEF) Travel and Tourism Competitive Index, the target is to train 5,000 tourism workers and certify 500 tourism professionals under the ASEAN Mutual Recognition Agreement (MRA).

Human Resources: Education and Training

Tourism education and training in the Philippines has been rationalized, with the formal educational courses guided by the Commission on Higher Education (CHED) and the non-formal education or vocational courses guided by the Technical Education and Skills Development Authority (TESDA).

FORMAL EDUCATION. CHED sets the policies and standards for Bachelor of Science in Tourism Management (BSTM), Bachelor of Science in Hospitality Management (BSHM), Bachelor of Science in Hotel and Restaurant Management (BSHRM), and Bachelor of Science in Travel Management (BStrM) for the purpose of rationalizing the undergraduate tourism management/hospitality/hotel and restaurant and/or travel management education in the country in keeping pace with demands of global competitiveness.

Table 5. Existing and Projected Supply of Accommodation Units by Region (2012 and 2016)

REGION	EXISTING (2012)	IN THE PIPELINE	TOTAL	PLANNED EXPANSION	PROJECTION (2016)
Northern Philippines	71,803	8,125	80,018	3,311	71,831
Central Philippines	61,978	5,129	67,107	5,146	74,551
Southern Philippines	28,622	1,686	30,308	2,061	17,506
TOTAL	162,403	15,030	177,433	10,518	187,951

SOURCE: DOT

Table 6. Number of Accredited Tourism Service Providers and Tourism Related Establishments (TREs) Located in the Regions of the Philippines (December 2013)

REGION	TOUR OPERATORS/ TRAVEL AGENTS	TOUR GUIDES	TOURIST TRANSPORT OPERATORS	TOURISM RELATED ESTABLISHMENTS (TREs)
NCR (National Capital Region)	231	175	122	126
CAR (Cordillera Autonomous Regions)	12	119	-	34
Region I (Ilocos Region)	38	47	-	21
Region II (Cagayan Valley)	17	-	-	25
Region III (Central Luzon)	60	4	13	9
Region IV (CALABARZON & MIMAROPA)	160	146	9	20
Region V (Bicol Region)	28	48	1	8
Region VI (Western Visayas)	26	23	24	13
Region VII (Central Visayas)	99	211	125	17
Region VIII (Eastern Visayas)	9	1	2	-
Region IX (Zamboanga Peninsula)	6	-	-	13
Region X (Northern Mindanao)	18	14	1	17
Region XI (Davao Region)	33	18	2	10
Region XII (SOCCSARGEN)	9	-	2	2
Region XIII (CARAGA)	4	29	-	-
TOTAL	750	835	301	315

SOURCE: DOT-OTPRIM

The tourism education program emphasizes skills and competencies instead of just managerial theory. Formal classes are scheduled in such a way as they provide more but focused options for the students in terms of career paths. The prescribed course line-up incorporates subjects from sustainable development to international standards and practices in order to address issues related to market imperfections and the challenges of globalization.

The Enhanced K to 12 Basic Education Program now also incorporates basic education on tourism-related services like tour guiding.

NON-FORMAL EDUCATION. Overall, TESDA formulates manpower and skills plans, sets appropriate skills standards and tests, coordinates and monitors manpower policies and programs, and provides policy directions and guidelines for resource allocation for the Technical-Vocational Education Training (TVET) institutions in both private and public sectors. TESDA vocational courses in the tourism industry are implemented in coordination with DOT and the TESDA-accredited institutions/schools involved in manpower development nationwide.

DOT conducts its own training programs for both public and private practitioners in the tourism sector. These programs are different from those of TESDA as these are specially designed for specific identified training needs of prospective participants.

The private sector also independently conducts training through association-sponsored programs and in most cases, with assistance from DOT (in the form of subsidies and resource persons).

It is worthy to note that the DENR and DOT commissioned the Development Academy of the Philippines (DAP) to design an Ecotourism Training Module to serve as a training program for protected area managers, ecotourism planners and developers, the academe (as formal subject of curriculum), and for DENR, DOT, and local government tourism-related non-formal training. The Ecotourism Training Modules were developed and pilot-tested by DAP in two sites, HINP and Bohol; about 40 participants from DENR and DOT national and regional offices were trained.

HIGHLIGHTS OF THE NES AND ACTION PLAN 2002–2012 ACCOMPLISHMENTS

The formulation of NES 2002–2012 was one of the components of NEP I, which was funded through a grant from the NZAID. NEP I covered the period 2000–2004. The project collaboratively implemented by DOT and DENR, jumpstarted the initial component activities under the NES. The significant outcomes of NEP I include the formulation of the NES; strengthening of EO 111 bodies (through training, seminars, and study tours); development of ecotourism products in four pilot sites; assessment of all key ecotourism sites identified in the NES; development of ecotourism website (www.ecotourismphilippines.com); publication

of quarterly newsletters on ecotourism; and a study on the establishment of the ecotourism fund.

The pilot sites for NEP I and the ecotourism products developed were: Banaue, Ifugao (Banaue Trek), Angeles, Pampanga (Sapang Bato Nature Trek), Pamilacan Island, Bohol (Marine Life Tour), and Mt. Apo Natural Park, Davao (trekking trails and signage).

NZAID continued the NEP project with a second phase from 2004 to 2009. The NEP II provided grants to implement key activities in the Action Plan of NES 2002–2012, as well as expand the development of ecotourism projects in four protected areas in addition to the pilot sites in Phase I. The overall goal was to mainstream ecotourism into DENR's community-based resource management programs as a means to improve livelihood and to manage natural and cultural resources in a sustainable manner.

The strategic components of NEP II included the following:

1. ESTABLISH ECOTOURISM BUSINESSES AND VISITOR SERVICES. This consists of site level interventions to establish ecotourism businesses and visitor services as a means to improve livelihood strategies for communities living in or

adjacent to protected areas, and to increase the income of the protected areas through the development of business plans and capacity building. This was done in four banner sites: Hundred Islands National Park and Mt. Mayon Volcano National Park in Luzon; Lake Sebu Watershed and Forest Reserve in Mindanao; and Rajah Sikatuna Protected Landscape in Bohol. Continued support was also given to the three Phase I banner sites: Sapang Bato–Mt. Pinatubo, Banaue Rice Terraces, and Pamilacan Island.

2. ESTABLISH ADVOCACY AND COORDINATION OF THE NES WITHIN DENR AND DOT. This includes the formulation of standards and ecotourism network; policy development on protected area management and financing; development of a monitoring system to track the overall implementation of the NES; and incorporation of ecotourism modules in relevant national training programs.
3. ESTABLISH PRODUCT DEVELOPMENT AND MARKETING AT SITE, REGIONAL AND NATIONAL LEVELS. This covers marketing development for the above four Phase II banner sites (including national level marketing work) and ongoing support (capacity building and marketing) at the three Phase I banner sites.

The positive results and outcomes of NEP II include the following:

1. Establishment of income-generating projects and creation of employment among disadvantaged groups including women, youth, and indigenous peoples at the Phase II banner sites;
2. Expansion of employment opportunities and community income generation at two of the three Phase I banner sites;
3. Improvements in sustainable resource management and reduction in unsustainable activities at a number of banner sites;
4. Development of training modules in ecotourism;
5. Development of key policy initiatives, such as the DOT Ecotourism Standards; and
6. Implementation of a number of ecotourism-focused marketing initiatives by DOT.

In terms of impacts, the following impacts of NEP II were identified:

ECONOMIC IMPACTS. Visitor numbers have increased at the sites during the lifespan of the project. More tourists utilize ecotourism products established in Pamilacan, Sapang Bato, Hundred Islands National Park, and Lake Sebu, as shown in the indicative statistics below (Table 7).

Employment was generated for target beneficiaries in most sites, namely, for 12 Kayak guides in HINP, 39 Aeta tour guides in Sapang Bato, 98 PIDWWO

members in Pamilacan, 435 Kenhulung Federation members, and 29 local tour guides in Lake Sebu and Banaue.

At HINP, most of the income of the organized tour provider were reinvested to buy equipment for the business. In Lake Sebu, tour guides claimed to be earning an additional income of Php 300 to Php 500 per trip per guide, roughly translating to additional income of Php 18,000 to Php 60,000 per year. Kenhulung Federation members experienced huge increases in sales and orders mainly through their exposure in trade fairs; they roughly estimate their former incomes to be 20% to 40% of what they are currently earning.

At Sapang Bato, since 2003, the tour guide association has earned an annual average of Php 70,000 to Php 80,000 from tour guiding operations.

On January 2007 alone, tour guides earned a total of Php 85,600, mostly from Korean tourists. PIDWWO operations in Pamilacan experienced significant increase in their gross incomes throughout the years of project implementation: revenues have increased to Php 285,000 in 2003; Php 522,000 in 2004; Php 504,000 in 2005; and Php 928,000 in 2006. Table 8 summarizes approximate income increases in these banner sites.

At the same time, government revenues have reportedly increased as well through the collection of

Table 7. Visitor Arrivals at NEP Banner Sites (2004–2007)

YEAR/SITE	2004	2005	2006	2007 (Q1)
HINP		300% increase from 2004 [a]	3,068 * [b]	14,250 * [b]
Lake Sebu [c]	69,792	101,924	249,396	18,000
RSPL [d]	10,000	N/A	18,000	N/A
Mt. Mayon [e]	504,000 **	610,000 **	344,000 **	N/A
Pamilacan (no. of trips) [f]	174	168	364	N/A
Sapang Bato (no. of trips)	N/A	N/A	N/A	287

* Refers to the peak period of April 5–10 of that year only

** Refers to Lidong campsite visitors only

Source: [a] CENRO-DENR, Alaminos, Pangasinan, April 2007; [b] HINP LGU, Alaminos, Pangasinan, April 2007; [c] Municipal Ecotourism Council, Lake Sebu, April 2007 [d] PAMB, RSPL, Bohol, April 2007; [e] PASU, Mayon Volcano Natural Park, Bicol; [f] PIDWWO records, Pamilacan Island, Bohol, April 2007

visitor entrance fees in Phase II sites.

SOCIAL IMPACTS. A significant feature of the establishment of community-based business enterprises is the inclusion of a training component for the beneficiaries. All training participants claimed increases in their social status, mostly due to the newfound level of confidence brought about by increase in their skills, their membership in organizations supported by the project, and their exposure to people outside their community. The project highlighted their potential to contribute to their household incomes and their empowerment as productive members of their community. Social relations among community members in some sites improved.

ENVIRONMENTAL IMPACTS. In some sites, environmental improvement were observed as a result

of the introduction/enhancement of the ecotourism product. At Lake Sebu, increase in production of *tinak* products had positive environmental impacts on the remaining forest. There was a sudden increase in their demand for abaca, leading to increased planting thereof. Timber poaching was thus reduced given that abaca needs the shade of tall trees to survive.

In HINP, there has been a decrease in solid waste being disposed into the sea, but this could be attributed mainly to the improvement of solid waste management facilities provided on the islands rather than on the kayaking operations.

At Sapang Bato, the increase in incomes of Aetas from tour guiding has led to decreased incidences of timber poaching and slash-and-burn farming.

Table 8. Income Increases at NEP Banner Sites, in Php (2003–2007)

YEAR/SITE	2003	2004	2005	2006	2007
HINP kayak operators				Reinvested to buy additional paddles, hot air gun, additional life vests	
Sapang Bato tour guides	70,000			80,000	85,600 (January)
Lake Sebu					
a. Resort owners			Triple of past earnings		
b. Tour guides				18,000–60,000 per resort guide	
c. Kenhulung Federation			Roughly triple of past earnings		
Pamilacan PIDWWO	285,000	522,000	504,00	928,200	

In Pamilacan, the increase in PIDWWO membership has meant less destructive fishing and manta ray hunting among community members. The alternative livelihood provided by the dolphin- and whale-watching operations has led to the decreased use of destructive methods of resource extraction in Pamilacan waters.

INDIGENOUS PEOPLES AND GENDER IMPACTS.

In sites where indigenous people (IP) groups were present, impacts on these groups were highly positive, given the direct targeting of IP groups as project beneficiaries like the T'boli's in Lake Sebu (99% of 435 members of Kenhulung Federation, and half of tour guide association); Aetas in Sapang Bato (39 members, or 100% of the Tour Guide Association);

and Ifugaos in Banaue (100% of Tour Guide Association).

While in varying degrees, the Project showed positive impacts on targeting women beneficiaries. In HINP, kayak operators are mostly women (7 out of 12), as with most of the tour guides in Lake Sebu are women (21 out of 29 members). The most significant gender impact was cited by the members of the Kenhulung Federation in Lake Sebu. They cited the project's interventions as instrumental to empowerment, having been more involved in social issues of the community. Because of the increase in their economic and social status, they also gained confidence in participating in settlements of social conflicts.

Case Profile

LAKE SEBU TOUR AND T'BOLI WOMEN HANDICRAFTS-WEAVERS

The NEP project for Lake Sebu Watershed Forest Reserve in South Cotabato focused on enhancement of lake tour packages, waterfalls facility upgrade, handicraft revitalization including T'boli handicrafts quality and designs, development of a central retail outlet and meeting space for handicrafts near existing market, and skills training program for boat tour guides and handicraft making.

The beneficiaries of the handicraft revitalization component was the Kenhulung Federation, a group of 435 T'boli women weavers belonging to six POs. As a federation, they managed the Handicraft Enterprise. The T'boli women were provided enhancement training by PBSP on skills, organization and business development, and accounting and marketing. The Kenhulung Federation have since participated in tourism trade fairs and exhibits/festivals where they sell and promote their indigenous handicrafts, culture and arts.

During the project period, the Federation has generated a gross income of Php 88,000 to Php 285,000 between 2007 to 2008. The enterprise has expanded to include other indigenous products and a Visitor Management Center to showcase their arts and craft. It has also improved their skills and livelihoods, and strengthened organizational cooperation and teamwork among the different peoples' organizations that are members of the Federation (DENR and DOT, 2008).



(PHOTO BY DENR-BMB/GEORGE TAPAN)

In Sapang Bato, women have increased their handicraft production with the increase in tourist arrivals. The PIDWWO women in Pamilacan (almost half of total membership) benefited from increased tourism, mainly through their catering services and souvenir-making.

INSTITUTIONAL IMPACTS. The Project increased cooperation between DOT and DENR because of the institutional set-up, which required both agencies to closely coordinate with each other both at the national and regional levels. Some local government units (LGUs) were able to avail of knowledge and skills transfer in sites where the LGUs were the lead partners (i.e., HINP and Pamilacan).

GOOD PRACTICES FROM THE NEP. Some good practices were observed after implementing NEP II. In Hundred Islands, the project organized the Hundred Islands Eco-Tour Association (HIETA), a group of out of school youth, and empowered them through “capacitation” to operate and manage the ecotourism enterprise. This was further strengthened with further support from the LGU of Alaminos City.

Partnership between project implementers and key stakeholders like LGUs and local communities or peoples’ organizations (POs) helped facilitate project deliverables and ensured project sustainability, as in the case of Hundred Islands, Mayon Volcano, and Lake Sebu. The LGU continued to give support to maintain

the infrastructure and provide additional assistance to the ecotourism enterprises of the POs.

The inclusion of the indigenous peoples (T’boli women in Lake Sebu and the Aetas in Sapang Bato) as project beneficiaries, particularly for income generation, was a successful project strategy. Provision of skills training to enhance their handicrafts and linking them to trade fairs, exhibits, and the market (both here and abroad) not only empowered them socially, but also enhanced their status as productive members of their communities.

Lessons Learned

STAKEHOLDER INTERVENTION/PARTICIPATION. Stakeholder participation has generally been broad from the outset. Participation at the site level was varied and in some instances played a larger role. Consultation and inclusiveness have been broad, and this had an impact to some extent on the rate of implementation.

GENDER AND INDIGENOUS PEOPLES ISSUES. The project was successful in terms of being gender and IP inclusive in most of its activities. It successfully targeted IPs in areas where they live and included them as project beneficiaries, particularly for income-generating projects at Lake Sebu and Sapang Bato. There is a positive gender balance in the majority of activities undertaken. A proactive gender policy in the recruitment for project activities ensured that an

Case Profile

PAMILACAN ISLAND MARINE LIFE TOUR

The Marine Life Tour of the Pamilacan Island Dolphin and Whale Watching Organization (PIDWWO) in Bohol was enhanced through the NEP. Pamilacan Island is a small island off the Bohol Province mainland, and its residents used to hunt dolphins, whales, whale sharks and manta rays.

The Marine Life Tour, however, was created to market the dolphin and whale watching as a new ecotourism product of the province of Bohol and the Philippines in order to provide a viable alternative livelihood to the families affected by the government ban on the hunting and trade of dolphins, whales, whale sharks and manta rays.

With a membership of 98 members, PIDWWO's Marine Life Tour generated an average of 235 trips annually and earning of about Php 560,000 average per year during the project period from 2004 to 2008.



(PHOTO BY DENR-BMB/DOT)

equitable gender balance was established.

SUSTAINABILITY AND CAPACITY BUILDING. The project built some capacity within the DENR and DOT in relation to project management and ecotourism development. In addition, some capacity was developed at the site level to plan and manage ecotourism for sustainable resource management. There is evidence that central agency activities in relation to the project could be sustained.

Overall, social preparation, including getting stakeholder consensus and cooperation, is crucial to avoid conflicts and delays in project implementation. Identification and selection of key stakeholders like NGOs is important, especially at the project inception phase. Furthermore, the needed skills can be identified at an early stage and can be addressed by the project if stakeholders are properly and constantly consulted.

PROJECT ADMINISTRATION AND MANAGEMENT. Foremost in project implementation is the presence of strong management giving directions and guidance especially during the start-up of the project. Changes within the DENR's senior management had affected implementation both at the national and site levels. The change in lead agency role (DOT in NEP I and DENR-DOT rotation in NEP II) offered the advantage

of securing ownership. However, this led to losing momentum, leadership consistency, long-term ownership, agency commitment, and capacity building. Slow internal financial procedures and slow reporting by the regional teams further affected effective and efficient management. The decision on the number of project sites and scope of project activities should be given priority attention by the project management to focus the funds on achieving deliverables.

SUSTAINABILITY. There is a need to ensure sustainability for emerging income generating opportunities, especially since these are community-based enterprises. There should be continuing capacitation of POs by the concerned LGUs, DTI, and other agencies to further enhance their ecotourism products. Strengthening partnership with the DOT and the private sector for the promotion and marketing of the ecotourism products is also key.

Other Ecotourism Initiatives

During the timeframe of NES 2002–2012, other ecotourism initiatives in the form of plans, programs, and projects have been implemented by various tourism players, such as private entrepreneurs, LGUs, and other government agencies. Funding were provided by donors and private financing institutions.

Case Profile

SAPANG BATO ADVENTURE

As a result of the eruption of Mt. Pinatubo in 1991, the terrain of the surrounding areas around the volcano has consisted of outstanding outcrops of white-faced gorges, hot springs, meandering rivers, and stunning lunar-like landscapes. The NEP project developed the Sapang Bato Adventure which consists of a thrilling 45-minute 4x4 wheel drive through the rugged terrain and river route, and culminating with a series of exhilarating baths at the hot springs and mud baths at the end of the drive.

Operated by the community, with 39 Aeta guides, 6 rugged terrain 4-wheel drive vehicles, and facilities set up as spa and baths at the end of the drive, the original ecotourism product during the project period generated an annual average income of Php 70,000 to Php 80,000 income from tour guiding operations. In January of 2007 alone, tour guides earned a total income of Php 85,600 mostly from Korean tourists.



(PHOTO BY DENR-BMB/DOT)

Some of these initiatives include:

GOVERNMENT AGENCIES

1. DENR: National Program Support for Environment and Natural Resources Management Project (NPS-ENRMP) and the National Program Support for Environment and Natural Resources Management Project under GEF (NPS-ENRMP-GEF), both having ecotourism livelihood projects in their components. NPS-ENRMP is a World Bank programmatic loan for US\$ 50 million, while NPS-ENRMP-GEF is also a World Bank grant of US\$ 8.35 million for eight critical watersheds, including Liguasan Marsh. Meanwhile, the Integrated Coastal Resources Management Program (ICRMP), an ADB loan project implemented by BMB, also covers enterprise development in coastal areas in the country, through ecotourism. This is a seven-year project which so far, in terms of ecotourism enterprises, has established 55 ecotourism based enterprises allotted with Php 9 million, and trained over 447 participating community members (35% of whom are women), as of 2013.
2. DOT: Formulation of Ecotourism Plans for Guimaras Island, Samar Island Forest Reserve and Bohol Province (with UNDP funding), and the Ecotourism Plan for Camiguin Island and the Vigan Heritage Master Plan with funding from the Spanish Government. Under a GIZ grant, DOT also formulated the Brunei-Indonesia-Malaysia-Philippines East Asia Growth Area (BIMP-EAGA) Road Map for Ecotourism Development. Japan International Cooperation Agency (JICA) has also

assisted DOT in formulating the Tourism Master Plan for Northern Palawan and the Tourism Master Plan for Central Philippines. It also provided a three-year technical assistance project for the Development of Tourism Statistics System for LGUs. Implemented by DOT through the Philippine Conventions and Visitor Center (PCVC), Grassroots Entrepreneurship and Employment in Tourism (GREET), was a grassroots-level grants program aimed at extending livelihood opportunities to aspiring entrepreneurs in ecotourism areas. It provided livelihood grants amounting to Php 50,000 to Php 100,000 to groups or individuals with feasible entrepreneurial/business proposals in ecotourism sites in the country. GREET was launched in 2007. DOT allotted Php10 million annually and it had more than 53 projects nationwide benefiting 3,794 individuals in six regions.

3. DTI: Small and Medium Enterprise Development for Sustainable Employment Program (SMDESEP) and Developing a Management Approach for Eco-Industrial Development in Philippine Economic Zones, both funded by GIZ have provided technical assistance for ecotourism in the Visayas.

LOCAL GOVERNMENT UNITS

1. Inclusive Tourism for Aklan Province in partnership with Aklan Provincial Government, from a grant by the International Trade Center of the World Trade Organization.
2. UNDP Global Environment Facility (GEF) Small

Grants Programme (SGP) has provided grants to NGOs for ecotourism projects in Bohol, Cagayan Province, and Sibuyan Island in Romblon.

3. Apo Reef Natural Park co-management between DENR and LGU, has generated Php 12.405 million with 24,105 visitors from 2002–2010.
4. Mt. Pulog National Park, with funding support from the Benguet Provincial Tourism Office, with its cloud formation watching and mountain trekking activities, led by the Ecoguides and Porters Association has a total visitors of 35,554 generating Php 5,721,740.82 from 2002-2010.
5. The Provincial Governments of Agusan and Bohol have formulated Provincial Tourism Plans and tourism standards under the AUSAID Philippines-Australia Human Resource Development Facility (PAHRDF).
6. Aklan Province's ecotourism projects in Kalibo and Tangalan, (piña weaving project in Kalibo and in Tangalan, the PO-operated a bicycle rental and cooperative store for one of the tourism areas) were also funded by AUSAID Philippines-Australia Human Resource Development Facility (PAHRDF).

NON-GOVERNMENT ORGANIZATIONS

Some NGOs involved in the development and advocacy of ecotourism include, among others:

1. In its project portfolio, WWF-Philippines, also known as Kabang Kalikasanng Pilipinas (KKP), has four major ecotourism projects in Donsol, Sorsogon, Mabini, and Anilao in Batangas, and the Tubattaha Reefs Natural Park in Palawan.

2. Conservation International (CI) works for the development of conservation enterprises such as ecotourism. Its projects are located in Palawan and Sierra Madre in Isabela.
3. Bantay Kalikasan has two projects related to ecotourism: Save the La Mesa Watershed Project, which consists of the La Mesa Eco-Park and La Mesa Nature Reserve, and its Memorandum of Understanding (MOU) with DOT for the promotion of the key ecotourism sites (through its television programs) and partnership in accreditation of ecotourism products (by enabling it to undertake third party assessments and recommend for accreditation).
4. The Wild Bird Club of the Philippines has conducted bird-watching activities in natural sites since 2003. To promote bird-watching in the country, it organized bird walks in Metro Manila (Libingan ng Bayani, Arroceros Forest Park, Tambo Mudflats, La Mesa Dam, etc.) and in protected areas like Mt. Makiling Forest Reserve and Mts. Palay-palay–Mataas na Gulod Protected Landscape. They have also organized an Annual Bird Fair since 2006, which has drawn visitors both foreign and local.

PRIVATE SECTOR

1. The United States Agency for International Development (USAID) funded the Sustainable Coastal Tourism in Asia (SCOTIA) Project covering six leading coastal tourism destinations namely, Balayan Bay in Batangas, Puerto Galera in

Mindoro, El Nido in Northern Palawan, Moalboal and Mactan in Cebu, and Panglao in Bohol, to protect the coastal and marine ecology and promote ecotourism. The project assisted private resort owners in environmental management activities to make their facilities environment friendly.

2. Educational and outdoor recreational groups have actively supported ecotourism with a view to build greater awareness and commitment to environmental protection. Special interest activities like bird-, dolphin-, and whale-watching have developed a niche market for foreign and local travelers.
3. Outdoor recreational programs like whitewater rafting, kayaking, mountain climbing, mountain biking, canopy walk and caving or spelunking have gained popularity among domestic travelers, especially students and young professionals. These programs are supported by outdoor recreational organizations (e.g., clubs, retail outlets, and associations).

Key Issues

The implementation of the NES 2002–2012, and ecotourism development in general, was premised on the concerted efforts of concerned stakeholders including government, private sector, civil society and the host communities.

However, this was largely undertaken by DENR and DOT, through the EO 111 bodies, as well as through civil society and LGUs through their regular operations and resources. In the course of NES implementation, several issues have constrained ecotourism development.

Table 9 shows the key issues and the strategic responses in the 2013-2022 NES and Action Plan.

Table 9. Matrix of Issues in NESAP 2002-2012 and Responses in NESAP 2013-2022

ISSUES IN NES AND ACTION PLAN 2002–2012	RESPONSE IN NES AND ACTION PLAN 2013–2022
Not all sites have ecotourism plans and business plans for specific products to guide the development of ecotourism in the sites, and the sustainability of the ecotourism products.	STRATEGY 1 Establish system on ecotourism planning and development. STRATEGY 3 Develop ecotourism enterprises.
Inadequate implementation of ecotourism standards and accreditation system to maintain quality and integrity, which will satisfy the community and the visitors.	STRATEGY 1 • Review and update standards. • Implement accreditation system.
Carrying capacities of ecotourism areas are not determined to manage influx of visitors and expansion of facilities.	STRATEGY 1 Visitor management - Carrying capacity for ecotourism - Site development plans - Zoning plans
Lack of policies and procedures to encourage ecotourism investments.	STRATEGY 2 • Develop and streamline policies and procedures on ecotourism investments. • Identify and promote ecotourism sites for PPP. • Establish one-stop-shops for ecotourism investments.
Need to formulate regional action plans to implement the NES, and facilitate the mainstreaming of the NES to the plans, programs and budgets of DENR, DOT, other government agencies and LGUs.	STRATEGY 4 Mainstreaming NES in national and local tourism plans.
The NES 2002-2012 was not widely disseminated to the stakeholders to fully realize its implementation. The new NES needs to be fully disseminated to all stakeholders, through IEC, and regular consultations.	STRATEGY 4 • IEC campaign to include communication plan and advocacy plan • Dissemination of IEC materials to stakeholders.
EO 111 bodies need to meet regularly to discuss key issues, formulate policies and assess progress of NES implementation.	STRATEGY 6 • Mobilize EO 111 bodies • Engage other stakeholders.
Inadequate funds, staff and other resources to enable ecotourism development in the sites.	STRATEGY 7 • Facilitate/initiate access to funding sources. • Access Overseas Development Assistance (ODA). • Develop and implement PES for ecotourism.
Lack of M&E mechanism to regularly monitor the implementation of NES and ecotourism programs and projects.	STRATEGY 8 • Establish M&E system. • Conduct monitoring program. • Conduct impact/outcome monitoring.



BALINSASAYAO TWIN LAKES NATURAL PARK, NEGROS ORIENTAL (PHOTO BY JOEL CARIÑO)

III. Strategic Framework

The Philippines recognizes that ecotourism is a tool for sustainable development. This is validated by the first ten years of implementing the National Ecotourism Strategy (NES), and the NES and Action Plan 2013–2022 maintains this recognition by sustaining the original ecotourism principles adopted by the first NES, namely:

- Sustainable management of natural and cultural resources
- Empowerment of local communities to participate and benefit from ecotourism
- Development of ecotourism products that satisfy visitors and position the Philippines as a globally competitive ecotourism destination
- Environmental education and conservation awareness

VISION AND GOAL

“The Philippines as a globally competitive ecotourism destination with its wealth of natural beauty and cultural richness, conscious of the need to conserve, enhance, sustain and develop these assets and ensure equitable sharing of benefits among its people.”

This vision of the National Ecotourism Strategy 2013–2022 was established on the principles of sustainable development, and the NES was built on the advocacy of mobilizing and fostering support for ecotourism development. The NES defined the roles of the EO 111 Bodies (NESC, NEDC, ETWG and REC) and their initial task of jumpstarting ecotourism awareness and promoting cooperation, seeking the participation of national government agencies, LGUs and other stakeholders in the development of ecotourism in the Philippines.

The goal of the NES is: *“Environmentally and socially responsible ecotourism development that safeguards the integrity and diversity of its natural resources, provides education and enjoyment to visitors and delivers larger and more widely distributed income and employment opportunities to the local communities and their constituents, especially the women, youth, indigenous peoples, and other vulnerable groups.”*

While the NTDP acknowledges key challenges that confront and ease the competitiveness of the country to diffuse a larger share of the international tourism markets to Southeast Asia, it identifies strategic directions that aim to leverage the Philippines’ comparative advantages to offset the weaknesses and threats that have constrained tourism growth in past. The three major strategic directions are:

1. Development and marketing of competitive tourist products and destinations
2. Improvement of market access, connectivity, and destination infrastructure; and
3. Improvement of tourism institutional governance and industry manpower capabilities

Consistent with the strategic directions of the NTDP, the National Ecotourism Strategy and Action Plan for 2013–2022 requires a strong cohesion among ecotourism stakeholders to pursue inclusive growth in the development of ecotourism sites and destinations that are networked within the identified clusters of tourism development.

The formulation of these new strategic goals adheres to the current and future needs on the development of ecotourism.

STRATEGIC DIRECTIONS AND OBJECTIVES

The overall goal of the NES is to develop and manage globally competitive ecotourism sites, products and markets that will contribute to inclusive growth. This is to be achieved by way of the eight (8) strategies as discussed below.

Strategy 1: Developing and marketing diversified and competitive ecotourism products

This strategy calls for market-driven ecotourism products that are networked within the identified tourism clusters of the NTDP. It also calls for the development of quality visitor experience adhering to the principles of ecotourism and is competitively marketed.

The objective of this strategy is to diversify and build viable high quality ecotourism products within the TDAs.

Strategy 2: Creating conducive environment for ecotourism investments

The strategy encourages the participation of private sector investment in the protection and management of the local environment and protected areas. The objectives of this strategy are:

1. To establish a sustainable investment framework for ecotourism
2. To develop confidence of the business sector on ecotourism investment
3. To contribute to financial sustainability of protected areas
4. To encourage creative and innovative community-based ecotourism enterprises

Strategy 3: Maximizing economic benefits for the host communities

Ecotourism provides local economic development opportunities to include its benefits in the management of protected areas and local environment. This strategy looks further in ensuring the cost-benefits and economic flow of development from the national down to the local level thus fostering an inclusive growth for all stakeholders.

The objectives of this strategy are:

1. To provide sustainable livelihood opportunities to the local stakeholders through ecotourism
2. To optimize the economic value of protected areas and other natural areas

Strategy 4: Promoting and developing a culture of ecotourism

Consistent with the strategic directions identified in the NTDP, creating a culture of ecotourism will further promote environmental awareness among the host communities and visitors.

The objectives of this strategy are:

1. To foster environmental awareness among host communities, local government, business sector and visitors.
2. To integrate ecotourism into local tourism plans and programs.

Strategy 5: Strengthening institutional capacity

This strategy provides the necessary support in the institutional development of ecotourism particularly at the local level. It aims to strengthen the local governance in the management of ecotourism destination and supports the human resource development required in ecotourism.

The objectives of this strategy are:

1. To establish capability building programs for ecotourism services (e.g. tour guiding, catering, etc.), local ecotourism planning, product development and management.

2. To improve management of data and information for easy access by stakeholders.
3. To provide a policy environment conducive to ecotourism development.

Strategy 6: Developing and strengthening partnerships

The communities and development partners are the key players in ecotourism development and this strategy aims to facilitate the engagement of partnerships among communities, entrepreneurs, government and funding sources.

The objectives of this strategy are:

1. To engage community and other stakeholders in ecotourism.
2. To provide equitable access to ecotourism opportunities across sectors of the community, especially women, youth and indigenous peoples.

Strategy 7: Establishing mechanisms for sustainable financing

There is a need to provide financing mechanisms for the development of ecotourism in the country. These funds will have to be generated from earnings of the protected areas (through IPAF and PES mechanisms), government subsidy, investments from private sector, LGU funds, and grants or loans from donor agencies.

The objective of this strategy is to mobilize funds to sustain ecotourism development.

Strategy 8: Monitoring outcomes and impacts

A monitoring and evaluation (M&E) mechanism is important to track the progress of NES implementation, and the outcomes and impacts of the strategies, programs and projects that are being implemented. The roles of the EO 111 bodies in the M&E system will be crucial to sustaining the monitoring activity.

The objectives of this strategy are:

1. To establish an M&E system for ecotourism policies and programs based on the NES.
2. To conduct regular monitoring of NES implementation, including a mid-term assessment.
3. To monitor visitor impact of ecotourism activities on biodiversity.



MT. KITANGLAD RANGE NATURAL PARK, BUKIDNON (PHOTO BY EARL RYAN JANUBAS)

IV. Selection Criteria

The selection of priority sites for ecotourism development will ensure the efficacy of the concerted efforts focused on these sites. The selection therefore will be based on a set of criteria for selected attributes that conform to the elements of ecotourism such as natural areas, community participation, quality of visitor experience, and educational value.

The set of criteria is being presented as a decision-making tool, primarily for the regional-level implementing body of the NES, the Regional Ecotourism Committees, to select and prioritize sites that, given the different attributes and levels of progress already obtaining in these sites, the implementing bodies can accordingly allocate resources that will further enhance or enable ecotourism development in the sites. Given the limits of availability of resources for ecotourism development, prioritization of sites should be in accordance with the scores of the sites chosen using these criteria, in order to fully optimize the available resources, or leverage these available resources with other sources of funds.

The decision makers can also use the results of the selection process to leverage support or partnership with investors.

Points are assigned to each attribute per category (Table 10). Get only the highest point per attribute. The highest total score is 100 points; the passing score is 70 points.

Table 10. Criteria for the Selection of Priority Ecotourism Sites

CATEGORY	INDICATOR	POINTS
1. PHYSICAL ATTRIBUTES (50 pts.)		
1.1. Biodiversity significance		
1.1.1. Presence of wildlife (flora and/or fauna) with ecotourism value	More than 5 species with ecotourism value 4-5 2-3 1	10 7 4 1
1.1.2. Ecosystem types with ecotourism value (forest, freshwater, marine and coastal, karst)	4 or more ecosystem types 3 2 1	10 7 4 1
1.2. Natural scenic attractions/geologic formation (cave, waterfalls, limestone formation, volcano, etc)	More than 5 4-5 2-3 1	10 7 4 1
1.3. Uniqueness (region wide)	One of a kind Not unique or common	10 5
1.4. Recognition/awards/legal protection (UNESCO World Heritage sites, Ramsar sites, ASEAN Heritage Park, NIPAS, Critical Habitat, etc.)	More than 5 3-5 1-2 None	10 7 4 0
2. ECOTOURISM PRODUCTS (10 pts.)		
2.1. Availability of existing ecotourism activities	More than 5 4-5 2-3 1	5 3 2 1
2.2. Potential ecotourism activities	More than 5 4-5 2-3 1	5 3 2 1

CATEGORY	INDICATOR	POINTS
3. SOCIAL PREPAREDNESS (10 pts.)		
3.1. Presence of registered people's organizations	PO with livelihood	5
	PO	3
	None	0
3.2. Presence of registered civil society organizations	With track record in community organizing	5
	Without track record in community organizing	0
[*] Involvement of organizations in tourism/ecotourism activities (BONUS PTS.)		4
4. CULTURAL FEATURES (8 pts.)		
4.1. Historical, archaeological or cultural sites	More than 4	4
	3-4	3
	1-2	2
	None	0
4.2. Cultural or historical, religious events/traditional (indigenous) knowledge and practices	Nationally known	4
	Locally known	2
	None	0
5. ECOTOURISM SERVICES (6 pts.)		
5.1. Availability of Ecoguides	Trained	1
	Not trained	0
5.2. Presence of tour operators	Within the region	1
	Outside the region	0
5.3. Visitor facilities (Requirement: Should be in accordance with DAO 2009-09/ international standards, PD 1586)		
5.3.1. Information center	Existing and functional	1
	None	0
5.3.2. Signage (interpretive, directional, restrictive, etc.)	Available	1
	None	0
5.4. Amenities		
5.4.1. Basic utilities/facilities (e.g. electricity, water, telecommunications)	Sufficient	1
	None	0
5.5. Accommodation		
5.5.1. Availability of rooms, hotels, in-stay programs in the vicinity	Available	1
	None	0

CATEGORY	INDICATOR	POINTS
6. MARKET (6 pts.)		
6.1. Current market demand based on number of recorded visitors	Monthly average of 100 for the previous year	3
	Below 100	2
	None	0
6.2. Revenue generated from ecotourism activities (rental fees, etc.)	With	3
	Without	0
7. ACCESSIBILITY (5 pts.)		
7.1. Means of transportation	Available	2
	None	0
7.2. Travel time (from major gateway)	0 to 3 hours	1
	4 or more hours	0
7.3. Distance to major gateways	0 to 30 km	1
	More than 30 km	0
7.4. Availability of transport	Available	1
	None	0
8. INSTITUTIONAL ASPECT (5 pts.) (Refers to governing bodies like REC, PAMB, LGU, Management Council)		
8.1. Issuance of relevant and related ecotourism policies (ordinances, resolutions)	Available	1
	None	0
8.2. Initiated relevant and related ecotourism programs/plans	Available	1
	None	0
8.3. Waste management implementation (RA 9003, Clean Water Act)	Implemented	1
	Not implemented	0
8.4. Peace and Order		
8.4.1. LGU security measures/programs, e.g., presence of law enforcers, paralegal personnel, "tanod" in the area	With	1
	Without	0
8.5. Safety measures (on natural disaster, etc.) for tourists and communities (e.g., Communication equipment i.e. Satellite phone, two-way radio, CCTV)	Present	1
	None	0

V. Action Plan

The Action Plan provides the activities for implementation to put the strategies into action and realize the different objectives. The DOT and DENR will lead the overall implementation of the Action Plan, and it is expected that the Action Plan will be translated into a National Action Plan by the NEDC/NESC thru the Ecotourism Technical Working Group and Regional Action Plans by the different RECs in order to implement the NES activities at the regional level.

DOT will take the lead in the product development, accreditation, and the marketing and promotion activities while DENR will spearhead the management, conservation and protection of the natural resources as well as visitor management in protected areas. M&E will be handled by both DOT and DENR, particularly at the REC level.

The timeframe of the Action Plan is divided into short-term (2013–2016), medium-term (2013–2018), and long-term (2013–2022). It is expected that an assessment of the progress of NES implementation will be done at mid-term.

PROGRAM	ACTIVITIES	TIMEFRAME			LEAD/ RESPONSIBLE AGENCY(IES) AND STRATEGIC PARTNERS	INDICATORS
		2013–2016	2013–2018	2013–2022		
STRATEGY 1. DEVELOPING AND MARKETING DIVERSIFIED AND COMPETITIVE ECOTOURISM PRODUCTS						
Objective: To diversify and build viable high quality ecotourism products within the Tourism Development Areas						
Ecotourism Standards and Accreditation	1. Review and update national standards for ecotourism entities and front liners (ecolodge, ecotour operator, ecoguides and other ecotourism products and services)				DOT	Revised Accreditation standards for ecotourism formulated and published
	2. Conduct orientations on the updated standards for ecolodge, ecotour operator and ecoguides				DOT, DENR	Number of orientations conducted
	3. Undertake accreditation				DOT	Number of accredited ecotourism lodge, ecotour operators and ecoguides
	4. Conduct monitoring and enforcement				DOT, DENR	Number of accredited ecotourism lodge, ecotour operators and ecoguides found to be compliant with standards
Product Development	1. Establish system on ecotourism planning and development				DOT, DENR, DILG	- Guidebook/guidelines adopted and disseminated - Ecotourism plans developed
	2. Develop new and enhance current ecotourism products that are environmentally-sustainable				REC, TIEZA, DOT, DENR, DPWH, NEDA	Sites prioritized and developed
	3. Develop support infrastructure/facilities				DENR, DOT/ TIEZA, LGU, DOH	Infrastructure/ facilities established and maintained
	4. Visitor management				DENR, DOT, REC, LGU, DOH	- Carrying capacity for ecotourism - Site development plan - Zoning plan

PROGRAM	ACTIVITIES	TIMEFRAME			LEAD/ RESPONSIBLE AGENCY(IES) AND STRATEGIC PARTNERS	INDICATORS
		2013-2016	2013-2018	2013-2022		
Marketing	1. Develop ecotourism marketing strategic plan				DOT, DTI	• Marketing strategic plan prepared
	2. Develop ecotourism destination brand				DOT	• Ecotourism destination brand established
	3. Establish access to market information on ecotourism products				DOT	• Website established; multimedia
	4. Engage champions for ecotourism				DOT	• Ecotourism products endorsed and promoted
STRATEGY 2. CREATING CONDUCTIVE ENVIRONMENT FOR ECOTOURISM INVESTMENTS						
Objective 1. To establish a sustainable investment framework for ecotourism						
Objective 2. To develop confidence of the business sector on ecotourism investment						
Objective 3. To contribute to financial sustainability of protected areas						
Objective 4. To encourage creative and innovative community-based ecotourism enterprises						
Investment Promotion	1. Develop and streamline policies and procedures on ecotourism investments				TIEZA, DENR, DOT	- Guidelines on TEZ designation in PAs formulated - Guidelines on incentive for ecotourism investments developed
	2. Identify and promote ecotourism sites for PPP				TIEZA, DOT, DENR, LGUs	- PPP projects initiated - Ecotourism sites managed under PPP
	3. Establish one-stop-shops for ecotourism investments				DOT, TIEZA	One-stop shops established
STRATEGY 3. MAXIMIZING ECONOMIC BENEFITS TO THE HOST COMMUNITIES						
Objective 1. To provide sustainable livelihood opportunities to the local stakeholders through ecotourism						
Objective 2. To optimize the economic value of protected areas and other natural areas						
Economic/ Enterprise Development	1. Develop ecotourism enterprise 1.1. Promote and facilitate ecotourism enterprise development at the local level				REC, LGU, DENR, DOT, DTI, DOLE, DBP, DSWD and other financing institutions	- Ecotourism business plans developed - Ecotourism enterprise developed in partnership with LGUs/private sector - No. of household provided with ecotourism-related livelihood - Increase in income of households

PROGRAM	ACTIVITIES	TIMEFRAME			LEAD/ RESPONSIBLE AGENCY (IES) AND STRATEGIC PARTNERS	INDICATORS
		2013–2016	2013–2018	2013–2022		
STRATEGY 4. PROMOTING AND DEVELOPING A CULTURE OF ECOTOURISM						
Objective 1. To foster environmental awareness among host communities, local government, business sector and visitors						
Objective 2. To integrate ecotourism into local tourism plans and programs						
Education and Advocacy	1. Information Education and Communication Campaign a. Formulate and implement communication plan b. Formulate and implement advocacy plan c. Produce and disseminate of IEC materials				DENR, DOT, DILG, Academe, Media, CSO	- Communication plan for ecotourism developed and implemented - Advocacy plan formulated and implemented - IEC materials produced and disseminated
	2. Mainstream NES in the national and local tourism plans				DENR, DOT, DILG, LGUs	National and local tourism plans incorporating NES
STRATEGY 5. STRENGTHENING INSTITUTIONAL CAPACITY						
Objective 1. To establish capability building program for ecotourism services (e.g., tour guiding, catering, etc.), local ecotourism planning, product development and management						
Objective 2. To improve management of data and information for easy access by stakeholders						
Objective 3. To provide a policy environment conducive to ecotourism development						
Support Program	1. Capability building				DENR, DOT	- Capacity development program developed - Implementors, REC, Ecotourism Technical Working Group (ETWG) and stakeholders capacitated - Training needs assessment
	2. Knowledge management a. Gather baseline data b. Establish database for ecotourism				DENR, DOT	- Baseline information (primary and secondary) - Database on ecotourism - Number of visitors/ecotourists recorded
	3. Development and adoption of policies				NESC, NEDC, REC, LGU	Policies formulated

PROGRAM	ACTIVITIES	TIMEFRAME			LEAD/ RESPONSIBLE AGENCY(IES) AND STRATEGIC PARTNERS	INDICATORS
		2013-2016	2013-2018	2013-2022		
STRATEGY 6. DEVELOPING AND STRENGTHENING PARTNERSHIP						
Objective 1. To engage community and other stakeholders in ecotourism						
Objective 2. To provide equitable access to opportunities in ecotourism across sectors of the community, especially women, youth and indigenous peoples						
Partnership and Linkages	1. Mobilize ecotourism bodies (NEDC, NESC, REC)				NESC, NEDC, REC, DENR, DOT	- Resolutions issued - Convergence programs initiated
	2. Engage other stakeholders (LGUs, PAMB, private sector, NGOs, academe and other agencies, women, youth, and indigenous peoples)				NESC, NEDC, REC, DENR, DOT	- Memorandum of agreement/ understanding - Programs/ projects initiated
STRATEGY 7. ESTABLISHING MECHANISMS FOR SUSTAINABLE FINANCING						
Objective: To mobilize fund to sustain ecotourism development						
Sustainable Financing	1. Facilitate/Initiate access to funding sources				NESC, REC, DENR, DOT, TIEZA	- Projects endorsed and/or approved to funding sources, e.g., TIEZA, 75% of IPAF funds - Guidelines on the mechanism for the utilization of 5% of travel tax for ecotourism
	2. Establish benefit-sharing scheme between and among concerned partners				DENR, DOT, LGU	Guidelines developed
	3. Access overseas development assistance fund				DENR, DOT, NESC, REC	Funding assistance accessed
	4. Develop and implement Payment for Ecosystem Services (PES) for ecotourism a. Conduct ecotourism resource valuation				DENR, NEDA, Research Institutions	Fees and charges for ecotourism

PROGRAM	ACTIVITIES	TIMEFRAME			LEAD/ RESPONSIBLE AGENCY(IES) AND STRATEGIC PARTNERS	INDICATORS
		2013–2016	2013–2018	2013–2022		
STRATEGY 8. MONITORING OUTCOMES AND IMPACTS						
Objective 1. To establish a monitoring and evaluation system for ecotourism policies and programs based on the NES						
Objective 2. To monitor visitor impact of ecotourism activities on biodiversity						
Monitoring and Evaluation	1. Develop monitoring and evaluation system (program and impact)				DENR, DOT, REC	• Monitoring and Evaluation tools and standards developed
	2. Conduct program monitoring				DENR, DOT, REC,	• Status report of ecotourism program implementation
	3. Conduct mid-term assessment of NES implementation				DENR, DOT, REC	• Mid-term report on NES implementation
	4. Conduct socio-economic impact monitoring				DENR, DOT, REC,	• Monitoring report on socio-economic status of beneficiaries
	5. Monitor/record ecotourists/visitors				DENR, DOT, REC	• Number of ecotourists/visitors recorded
	6. Conduct biodiversity monitoring				DENR	• Biodiversity monitoring system report (water quality, wildlife, habitat)

VI. Institutional Framework

KEY PLAYERS AND STAKEHOLDERS IN ECOTOURISM DEVELOPMENT

The development of ecotourism in the Philippines has gone a long way since the approval and implementation of the first NES in 2002. The stakeholders in ecotourism development may be grouped into the public sector (government), private sector, multilateral and bilateral agencies, non-government organizations (NGOs) and the communities (see Figure 1).

The public sector (National and regional government agencies and national and local government units) provides the policies, programs and projects, including the horizontal and vertical infrastructure, necessary for the tourism industry in general, and ecotourism in particular.

The private sector is what drives the tourism industry. This involves those providing services on transportation, accommodation, food and beverages, entertainment, travel trade and other support entities.

In ecotourism, the communities are the hosts at the front line as the direct providers of goods and services that are purchased and consumed by the tourists in general. Individuals and groups in the community provide transport services (jeepneys, buses, vans, pedicabs, pump boats, etc); operate lodging establishments, restaurants, entertainment outlets and shops. They also provide support services by providing food supplies in the local market.



Figure 1. Key Players and Stakeholders in Ecotourism Development

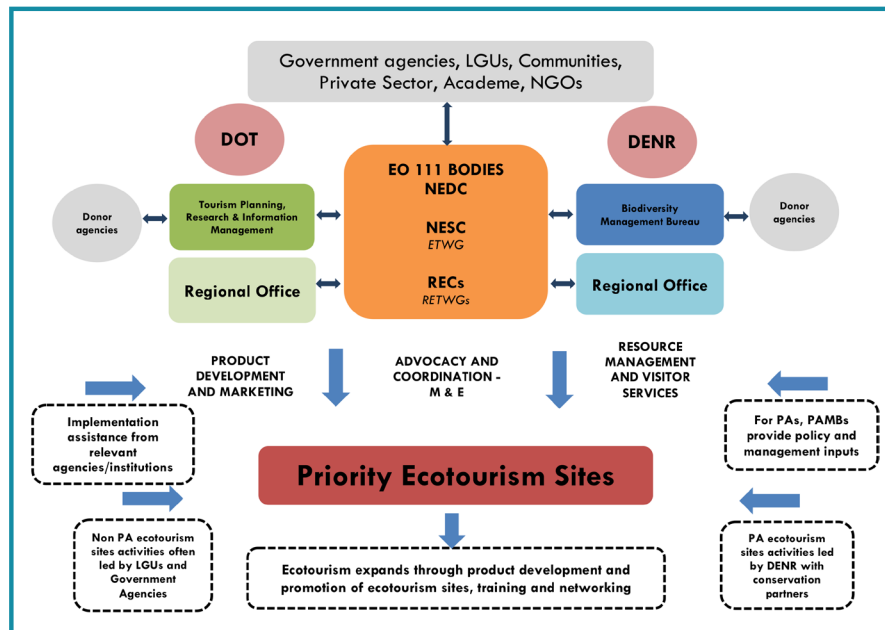


Figure 2. Institutional Relationships in Implementing NES

Public Sector/Government

The institutional framework for ecotourism development is still guided by EO 111, as supported by the Tourism Act of 2009 (Section 33). EO 111 provides the basis for the existence of the hierarchy of ecotourism bodies, namely, the NEDC, NESC, ETWG and REC.

In the government sector, the following agencies are involved in ecotourism development:

1. The Department of Tourism is mandated by the Tourism Act of 2009 (RA 9593) to ensure that the economic benefits of tourism are shared to a wider segment of the population. DOT formulates national tourism policies and national and regional tourism master plans. It promotes tourism internationally and locally; and organizes tourism-related vocational training together with TESDA. The Department's aim is to encourage, promote, and develop tourism as a major socio-economic activity to generate foreign currency earnings and employment and to spread the benefits of tourism to both the private and public sector. In general, the DOT has focused on marketing and promotion (through travel fairs, collaterals, familiarization tours, and other promotional strategies), product development (ecotourism, adventure tourism, medical tourism, sports tourism, etc.), policy formulation, accreditation and its other functions as mandated by its charter.
2. The Department of Environment and Natural Resources (DENR) through Executive Order No. 192 is responsible for the conservation, management, development, and sustainable use of the country's environment and natural resources. It is the agency in charge of the natural resources that constitute the base of tourism destinations and products for selected sectors of the tourism industry. The Biodiversity Management Bureau (BMB) is an attached agency of the DENR that is tasked to conserve biodiversity through the management and development of the National Integrated Protected Areas System (NIPAS), among others. As such, BMB is in direct partnership with DOT, and as mandated by EO 111, both DOT and DENR-BMB are the co-implementors of the National Ecotourism Strategy.

The following agencies are also vital to the development of ecotourism in the country:

1. Department of Education - to raise awareness on the need for environmental protection and cultural heritage protection, and to foster social cohesion and national unity among Filipinos
2. Department of Finance - to develop an incentive program for ecotourism to stimulate local communities and the private sector
3. Department of the Interior and Local Government (DILG) - to ensure that LGUs play a key role in developing ecotourism programs
4. Department of Public Works and Highways (DPWH) - to build and maintain the roads and

bridges that provide accessibility to the ecotourism sites

5. Department of Transportation and Communications (DOTC) - to build the air, sea and land terminals and communication hub to enable the ecotourism sites to market its products and establish linkages with other stakeholders
6. Department of Trade and Industry (DTI) - to foster the development of local products that can be promoted and marketed internationally. It also should enhance tourism-related business establishments, and coordinate, promote, and facilitate trade, industry and investment activities in the ecotourism
7. National Commission for Culture and the Arts (NCCA) - to support conservation of the cultural heritage resource base of ecotourism
8. National Commission on Indigenous People (NCIP) - ensure that the culture and traditions of the indigenous people are recognized, respected and protected in ecotourism planning and development
9. National Economic and Development Authority (NEDA) - to provide the policy and enabling climate for ecotourism development in consonance with PA 21
10. Under the Tourism Act of 2009 (RA9593), the Tourism Infrastructure and Enterprise Zone Authority (TIEZA) is now the attached agency of DOT as implementing arm for infrastructure development. It shall set aside five percent (5%) of travel tax collections for the development of

ecotourism sites in depressed provinces with strong tourism potentials.

11. The Philippine Tourism Promotions Board (PTPB) is also attached to DOT and is responsible for marketing and promoting the Philippines domestically and internationally as a major global tourism destination. The PTPB is also assisting in the development of its tourism products and services, with the end in view of increasing tourist arrivals and tourism investment.

Local Government Units

The DOT's regulatory powers were transferred to the local government units in 1991 with the implementation of the Local Government Code (RA 7160). Among the tourism development initiatives under LGUs that are mandated in the Code are as follows:

1. Tourism facilities and other tourist attractions, including the acquisition of equipment, regulation and supervision of business concessions, and security services for such facilities (for municipal government units)
2. Tourism development and promotion programs (for provincial government units)

Under RA 9593, LGUs are tasked to prepare and implement their own tourism development plans, enforce tourism standards, and collect statistical data for tourism purposes. LGUs shall also create permanent positions for Tourism Officers.

LGUs are highly recognized as key players in the success of ecotourism development. A number of LGUs have already linked up with DOT, DENR, NGOs and the private sector to undertake community-based sustainable tourism projects. Some have collaborated with media and outdoor clubs to promote greater consciousness to protect the environment and cultural heritage.

Association of Tourism Officers of the Philippines (ATOP)

Established in 2001 as an organization of Provincial, City and Municipal Tourism Officers nationwide, ATOP fosters unity in the tourism industry and promotes the welfare of tourists. It was created to strengthen the capabilities of LGU tourism officers for tourism development and enhance services provided to tourists in the different localities nationwide.

The ATOP members currently meet annually, at their expense, to discuss among themselves issues regarding tourism, and they also invite resource persons for specific topics such as marketing and promotions, ecotourism, and tourism planning. ATOP has a big potential for promoting tourism planning in the local governments, and through this organization, government agencies like DOT can enable LGUs to acquire capacity and capability in various aspects of tourism, such as planning, business development, data gathering (of tourism statistics), including assistance in implementing accreditation standards, and M&E.

Private sector

There are six industries directly involved in tourism: (1) the Transportation Industry, (2) Lodging or hotel Industry (hotels, resorts, inns, motels, lodging/pension houses, apartment-hotels), (3) Food & Beverage (restaurants, disco, travel food service and institutional food service), (4) Activities and Attractions or Entertainment Industry (museums, theaters, theme parks, adventure clubs, dive shops), (5) Travel Trade (travel agents, tour operators and tour guides), and (6) Other Private Sector Entities (publishing companies, ICT service providers, marketing and public relations organizations, event organizers and education and training institutions).

Non-Government Organizations

NGOs, with assistance from government or donor agencies, implement on a limited basis ecotourism related programs and projects as components of their conservation or environmental management programs, which are usually implemented in partnership with government agencies like DENR or LGUs. Such activities are usually included in the livelihood components of their programs and projects. Some NGOs involved in the development and advocacy of ecotourism include WWF-Philippines, Conservation International (CI), Bantay Kalikasan, Haribon Foundation, Philippine Speleological Society Inc., among others.

Multilateral and Bilateral Partners

Bridging the public and private sectors are the multi-lateral and bilateral donor agencies that support ecotourism programs and projects. Main donor agencies who provide either technical assistance or funding, or both, include the World Bank, ADB and UNDP for multi-lateral funding. Bilateral assistance was provided by NZAID, AUSAID, CIDA, JICA, GIZ, USAID and the Spanish Government.

INSTITUTIONAL ARRANGEMENTS

Figure 2 illustrates the institutional relationships in the implementation of the NES.

In accordance with the institutional mandates of the lead agencies, namely DOT and DENR, the DOT will be in charge of Product Development and Marketing, while DENR will be responsible for resource management and visitor services. The EO 111 bodies, as oversight entities, will be in charge of advocacy, M&E, among other responsibilities.

The main responsibility for overseeing the implementation of the NES rests with the EO 111 bodies namely: the NEDC, NESC, REC and the ETWGs. The roles of these bodies in NES implementation are described below.

National Ecotourism Development Council (NEDC)

The NEDC's role is to provide the policy direction for ecotourism guided by the NES as the basic framework for formulating policies, guidelines, rules and regulations. Any changes to the NES will have to be approved by the NEDC.

National Ecotourism Steering Committee (NESC)

The NESC, as the working committee of the NEDC will have the following responsibilities:

1. Review progress through regular reports from RECs and other implementing agencies;
2. Approve action plans for ecotourism development;
3. Encourage RECs to undertake product development and marketing for their ecotourism sites;
4. Approve major ecotourism projects; and
5. Coordinate with concerned agencies, institutions and organizations in the implementation of the NES;

Regional Ecotourism Committees (REC)

The RECs will have the following responsibilities in the implementation of the NES at the regional level:

1. Prepare action plans for ecotourism development in the respective regions based on the NES and Action Plan;
2. Conduct regular monitoring, and mid-term monitoring of the implementation of the Regional NES Action Plans;
3. Advocate and promote ecotourism development in the ecotourism sites in coordination with concerned agencies, institutions and organizations;
4. Provide advice and assistance in the development of ecotourism sites;
5. Approve minor ecotourism projects; and
6. Lobby for the enactment of ordinances and resolutions in support of ecotourism at the local levels;

Ecotourism Technical Working Groups (ETWG)

ETWGs, organized at the national and regional levels, shall assist the NESC and the RECs in implementing NES and action plans whereas ETWGs will provide technical and administrative support to NEDC, NESC, and RECs. They will also provide technical assistance to different projects in coordination with the experts from the different member agencies in the NEDC, NESC and RECs.



GRAND CAÑAO, MT. PULOG NATIONAL PARK, BENGUET (PHOTO BY DENR-CAR)

VII. Database and M&E

One of the more critical components of the NES is the establishment of a monitoring and evaluation (M&E) system at the national, regional, and site levels which will provide the basis for evaluating and enhancing the implementation of NES. In view of this, a monitoring framework needs to be developed to efficiently track the implementation of the NES. The framework will provide the structure, parameters and guidelines in monitoring and evaluating the projects and activities implemented at all levels as well as set the basis for the mainstreaming of ecotourism at the different organizational levels of the DENR and DOT.

The DOT and DENR are jointly responsible for ensuring that regular M&E of the NES Action Plan is undertaken for efficient utilization of project resources, as well as accountability, transparency, and integrity.

OBJECTIVES OF THE DATABASE AND M&E SYSTEM

The establishment of an ecotourism database will provide the basis for:

1. Monitoring and evaluating the effectiveness of the various ecotourism programs/project interventions on the quality of life of the project beneficiaries;
2. Evaluating the impacts of the ecotourism programs/projects on the physical, socio-economic and cultural environment; and
3. Future planning for necessary support and in developing marketing programs for ecotourism.

ESTABLISHMENT OF BASELINE INFORMATION

The baseline information, as derived from the surveys, should consist of the following information components:

1. TOURISM SECTOR – secondary data on facilities and services, infrastructure and public utilities, tourist arrivals and expenditures, tourist profile; tourism impacts (primary and secondary)
2. BIOPHYSICAL – secondary baseline data on physical features (landscape, flora, fauna), environmental quality (air, water, etc.)
3. SOCIO-ECONOMIC – economic (incomes, livelihood, job generation, etc.) and socio-cultural conditions (education, health, gender, lifestyle, etc.); demographics (population statistics, poverty index, etc.); and gender-disaggregated data
4. COMMUNITY BENEFITS – people's perceptions regarding ecotourism and quality of life, tangible and intangible benefits from program/project, community participation, etc. (primary survey)
5. ADMINISTRATIVE/INSTITUTIONAL/GOVERNANCE – structure of national government agencies and local government units concerned, and their development and operations policies and processes, as well as their linkage with public and non-government organizations and other institutional bodies. The following areas may be considered: resource mobilization, IEC/marketing/promotion, project management, and other externalities.

For easier access and better understanding, the above data will be presented and compiled under the following nomenclatures:

- Thematic maps of ecotourism sites
- Tourism or ecotourism plans (i.e., National, Regional, Provincial, Municipal, or City Plans)
- Text data including profiles of ecotourism sites
- Tables (statistics, etc.)
- Graphs (analysis)
- Reports (progress, monitoring, annual, etc.)
- Meetings proceedings/minutes, etc.

For the baseline, the following data are needed:

1. EXISTING OR SECONDARY DATA from reports, records of LGUs, concerned national government agencies, NGOs, multilateral organizations such as the UNWTO, and the UNEP, project proponents, etc.
2. PRIMARY DATA through surveys using the following methods, to be conducted by DOT-DENR regional teams
 - Focus group discussions (FGD) using the guide questionnaire to gather community information and validation
 - Key informant interviews (KII) using the guide questionnaire. KIIs are knowledgeable people with whom researchers conduct interviews on a one-on-one basis.
 - Individual respondents from project beneficiaries (use of socio-economic and perception survey questionnaire)
 - Analysis of survey results relating one set of

statistics or data with another or other sets of information to identify key indicators that will form part of the database taking into consideration the aspects of enhancement in quality of life of beneficiaries as well as impact on the environment and on the social, economic and cultural status of the community/project site.

There must be regular updating of information/data to ascertain their timeliness and the appropriateness/responsiveness of resulting plans and/or actions.

MONITORING AND EVALUATION OF PROGRAM/PROJECT

To determine the effectiveness of ecotourism projects on the quality of life of the project recipients as well as the impact to the environment, social, cultural and economic well-being of the site, the following courses of action should be pursued:

1. PERIODIC GATHERING OF INFORMATION ON PROGRAM/PROJECT ACTIVITY PROGRESS USING SURVEY FORMS FOR PROJECT BENEFICIARIES AND FGD FOR COMMUNITY (ANNUAL M&E BY DOT-DENR REGIONAL TEAM). This will involve determining the most feasible, cost-effective and practical time intervals between monitoring activities which would yield appreciable differences between readings, if measured quantitatively, or noticeable/marked visual observations/changes, if measured

qualitatively. Usually, the most feasible timed plan is one to three years. Beyond that may not be conducive to immediate corrective or enhancing measures.

2. ANALYZING PROGRESS/ASPECTS. This will involve looking deeper into the differences measured between monitoring periods, comparing with target yields/results, evaluating the causes of deviation to include externalities (factors or conditions outside the physical realm of the project or the project site, e.g., national and international terrorism, climatic conditions).
3. IDENTIFYING ISSUES, RISKS AND CONSTRAINTS. This will involve translation of the causes of deviation as deterrents or restraints in achieving the goals of ecotourism development, if left unchecked, unresolved, and/or not acted upon.
4. DEFINING APPROPRIATE RESPONSES TO RESOLVE ISSUES, RISKS AND/OR CONSTRAINTS. The above analysis will result in the identification of the strengths and weaknesses of the ecotourism projects in attaining the eight (8) objectives adopted from the UNWTO-UNEP Guide. Moreover, the externalities considered in the analysis will also uncover the opportunities and threats. When considered together, the SWOT analysis will generate appropriate actions befitting the peculiarities and particulars of the situation towards attaining sustainability and competitiveness for the ecotourism project and/or destination.

OUTCOME/IMPACT MONITORING

The expected outcome from the monitoring of the ecotourism project/intervention is the identification and evaluation of its impacts, i.e., changes – positive or negative – that it effects on the recipient or the concerned community. The evaluation and eventual measurement of impacts can be carried out quantitatively and/or qualitatively using appropriate indicators.

The identification of indicators for impacts of ecotourism projects shall conform to the following criteria:

1. CLARITY – Clearly defined with methods of calculation and/or expression and the forms of reporting and communication: Is it measurable quantitatively and/or qualitatively? Who will be the key users, and how will the indicators be phrased in terms easy for them to understand?
2. RELEVANCE to user and how they will use the indicators: Is it critical for short- or long-term decisions? When is the indicator required and its frequency?
3. FEASIBILITY – practical and affordable to measure: What data will be used and who will supply it? Who will be doing the analysis of the information? Who will cover cost and technical needs of data collection and analysis?
4. CREDIBILITY – supported by valid and reliable information: Who is the source of the information?

Is the data source independent, reliable and consistent? Is it of scientific soundness and object

5. COMPARABILITY – useful for comparison with other regions or standards: Is the indicator in use in this form in other destinations? What key benchmarks could be used?
6. OPERATIONAL CONCERNS – management to produce indicators on an ongoing basis; ongoing commitment to monitor the indicators: Who will be accountable for managing the procedure?

However, in the final analysis, the applicability of the above criteria to the project site or the project itself would be the deciding element in building up the requisite indicators of impacts for which there have been identified five distinct types, namely:

1. ENVIRONMENTAL/PHYSICAL – e.g., changes in landscape, volume of solid waste/garbage, degree of treatment of sewage , number of new buildings, commercial signs, recreational parks, tourist density/population density, level of contamination of bathing water, beach erosion, incidence of respiratory problems, noise levels
2. ECONOMIC – tourist volume and revenues, tourist expenditure, changes in local income, employment, volume of tourism business, investments, occupancy rates
3. SOCIAL – lifestyle, quality of life of the local people, employment and business opportunities for women, the youth, indigenous peoples.
4. CULTURAL – number of conserved/restored heritage sites and buildings, number of

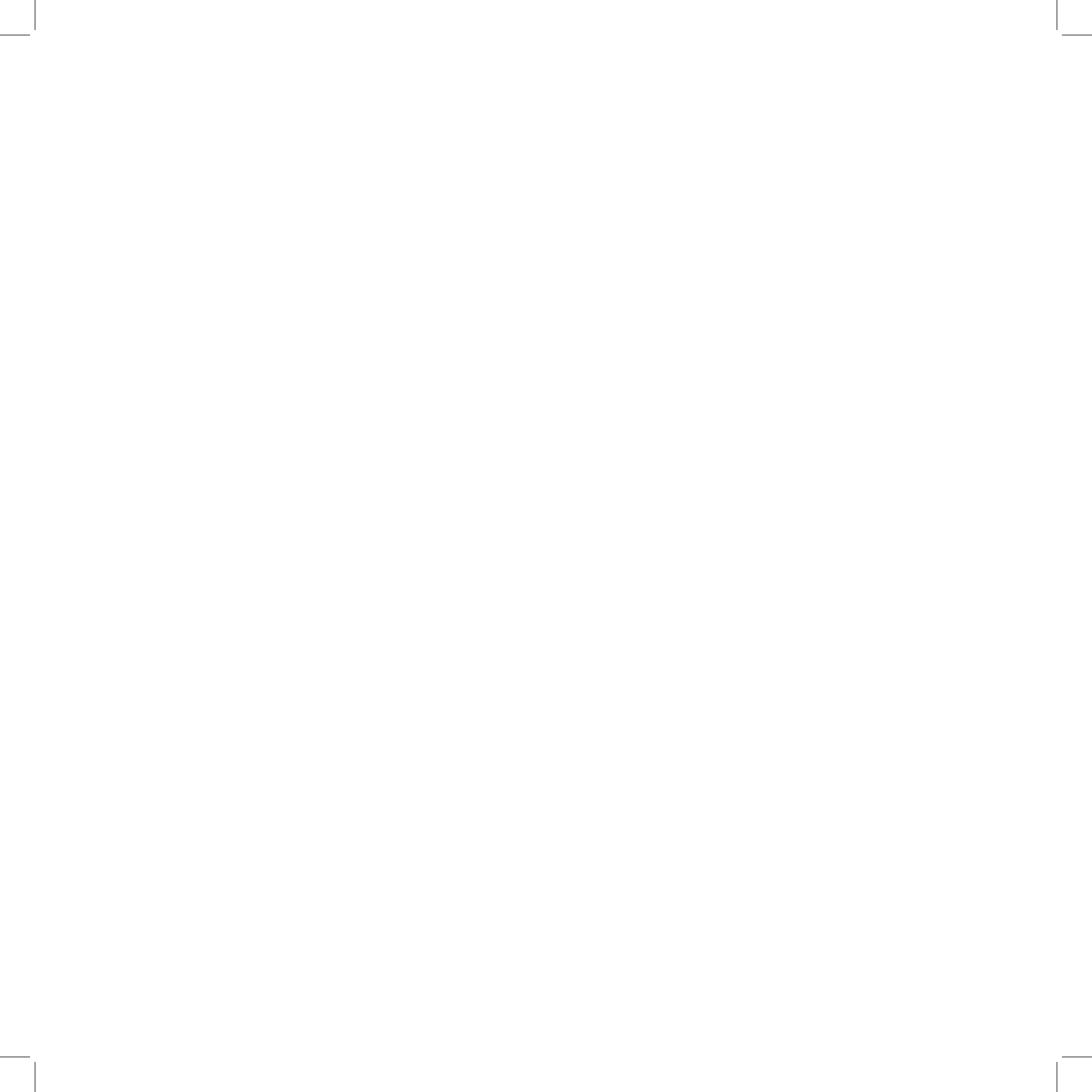
degraded/destroyed heritage properties,
conserved living culture – music, arts, costumes and
traditional practices; change in lifestyle.

5. INSTITUTIONAL – change in number/structure
of regulating agencies promotions/marketing
strategies programs/activities, degree of private-
public sector partnership

The choice of specific indicators from the list will be
contingent upon LGU's specific situations, circumstances
and capabilities – technical, financial, or institutional,
as well as political will.



MT. PULOG NATIONAL PARK, BENGUET (PHOTO BY BERNIE FIGER)





Republic of the Philippines
Department of Environment and Natural Resources
BIODIVERSITY MANAGEMENT BUREAU



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DEPARTMENT OF TOURISM