

HELVETAS Swiss Intercooperation

“Analyze the potential of eco-tourism in the Gulf of Mottama
(GoM), Myanmar”

Final report including situation analysis for focal sites

**public version, which has been updated and shortened: 15.12.2020*

Executive summary

Background / Approach

Situation analysis for focal sites

Conclusion and outlook

- The key objective of this assignment was to analyze the potential of (eco-)tourism in the Gulf of Mottama (GoM) in Myanmar. It is an integral part of the Gulf of Mottama Project (GoMP) that aims to secure livelihoods and coastal natural resources along the GoM.
- This final report is the result of an extensive field and desk research during December 2019 and March 2020, led by a team of local and international consultants. The results are based on a long list of potential and existing touristic sites and activities which were identified and assessed as well as on interviews with different stakeholders.
- It is understood that most tour operators already operate in the GoM region but only few of them offer products beyond the classic touristic sites of Bago, Golden Rock and Mawlamyine. This analysis looks beyond these sites to identify potential for (eco-)tourism.
- The lack of infrastructure and restrictions for foreigners pose a challenge to the GoM region with regard to potential tourism development. Another challenge is to create more demand to relatively low numbers of tourists visiting the GoM. A proper planning and involvement of different stakeholders to overcome these challenges is therefore seen as crucial before further development of any touristic site.
- Preliminary findings were presented to and discussed with the GoMP in February 2019. It was then agreed to proceed with three sites for further analysis, which present the core of this report. For these sites, one being located in Bago Region and two in Mon State, an in-depth situation analysis was conducted.
- The situation analysis focuses on Community Involvement in Tourism (CIT) and Ecotourism as two forms of tourism that sustain the well-being of the local people and conserve the environment, both targeting the main outcomes of the GoMP. CIT is an alternative concept of Community Based Tourism (CBT) which is advised by the Ministry of Hotel and Tourism (MoHT) in Myanmar and other stakeholders in a policy paper. Further steps and recommendations suggested for the analyzed sites are aligned with the policy paper on CIT as well as Myanmar's Ecotourism Policy.

Three different sites have been identified for potential touristic development that will be further assessed in this report

1

Thanattan Village
Thanatpin Township
Bago Region

- Focus on Community Involvement in Tourism (CIT) with two village communities.
- Potential activities: Mountain biking, horse riding, canoeing in the canals, local village and homestay experiences, food and cooking classes, visit local workshop places.
- Day trip and overnight activities with homestay experience (focus on combining different activities as a package).

2

**Zote Thoke Village and
Kaylartha Mountain area**
Bilin Township
Mon State

- Focus more on single activities than on packages, making it suitable for stop-over visitors.
- Promote different sites in one area as one destination to offer cultural, religious and eco-tourism activities.
- Mhu Tin Village could serve as base for GoM excursions (beach front destination, potential for mudflat activities and bird watching).

3

Dare Village
Chaungzone Township
Mon State

- Focus on Community Involvement in Tourism (CIT) with one village community.
- Day trip and overnight activities with homestay experience (focus on combining different activities as a package).
- Potential activities: Hiking, bird watching, boat excursions, local village and homestay experiences, food and cooking classes, language and culture (Mon), cultural activities (Mon period excavations, local museum), visit local workshop places.

Location on map and coordinates of proposed sites



Links to Google Earth

- [1. Thanattan Village](#)
- [2. Zote Thoke Village](#)
- [3. Dare Village](#)

Source: themimu.com

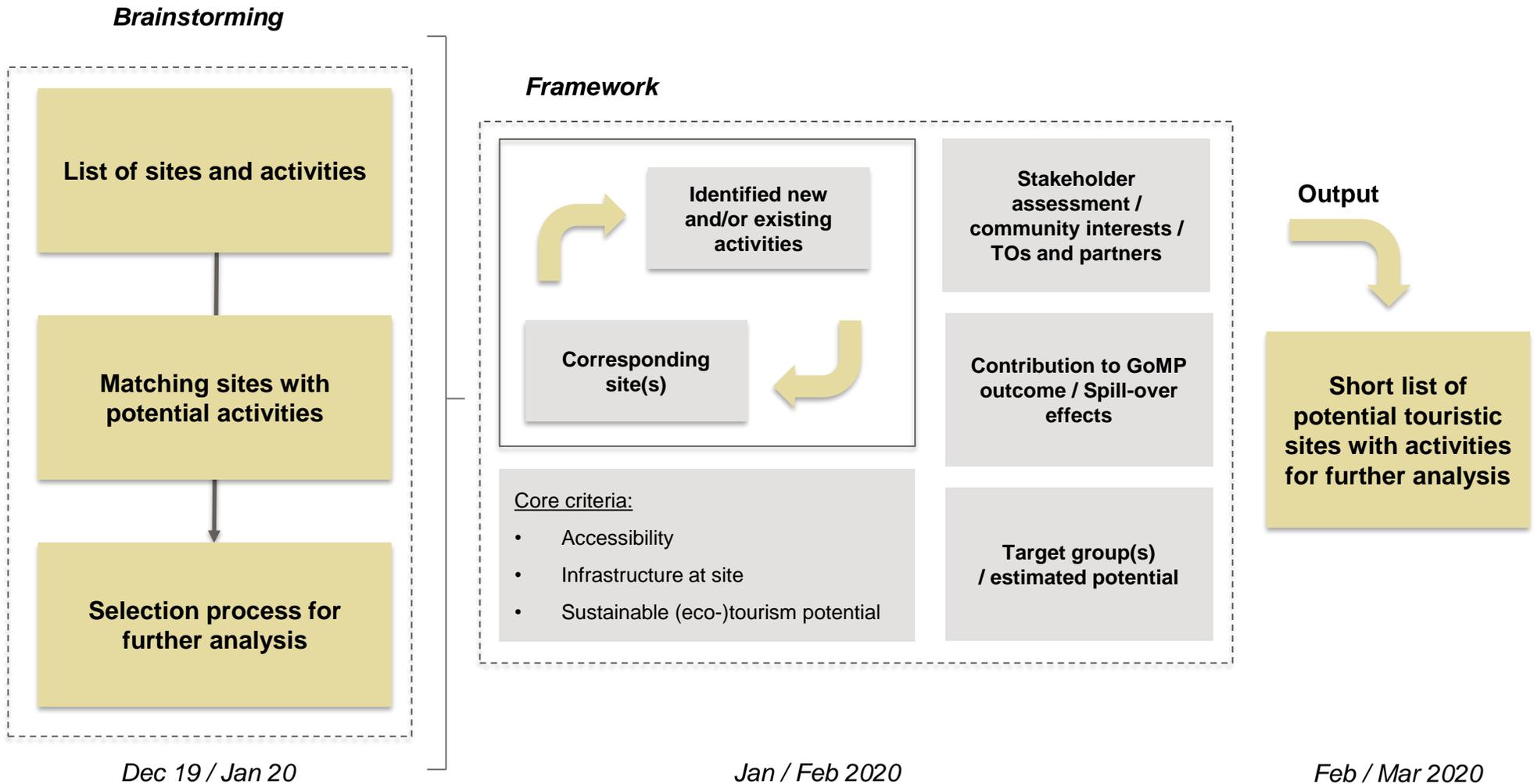
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A framework was developed for the selection process to assess the potential for identified touristic sites and activities



A total of 34 sites were assessed with a total of 46 activities to be matched with the corresponding site

No.	Existing / Potential	Mon / Bago	Township (e.g. Pyaw Oo, Thabeik, Pyaw and Chaungon in Mon State and Kawa, Tharabar and Kawa in Bago)	City/Location	Name	Description of tour	Description of site	Tour Operator name(s)
1	Existing	Bago	Kawa	Yangon to Kawa	Bicycle Ride "Village Life on the Old Dhammazedi Road"	Pick up in Yangon. On the bike ride, passing many local villages, stunning landscape and real countryside of		Khiri Travel
2	Existing	Mon	Chaungzon	Billu Island	Chaungzon Island bike tour	Half Day tour cycling around Chaungzon island and experiencing the culture on the beautiful island close to Mawlamyine.	On Chaungzon Island different handi craft products are made, such as: Pipes and wood work and Bamboo hat factory. One village (Ywar Lut) village is one of the famous villages for tourist attraction. There has been some handcraft production such as Burmese bamboo fabrication, tobacco pipes, walking sticks, weaving and old fashioned slat writing boards.	Uncharted Horizon
3	Existing	Bago	Waw	Pyi Bon Gyi	Bird watching at Moeuyngyi Wetland Wildlife Sanctuary	Discovery DMC has organised trips for bird watcher in the future to Moeuyngyi.	Moeuyngyi wetlands is about 70 miles north of Yangon, by the Yangon-Mandalay highway. Moeuyngyi is a shelter for resident and migratory waterbirds. A census at Moeuyngyi revealed that there are 125 species of water birds including 70 species of migrants.	Disc
4	Existing	Mon	Kyaukhto	Moke Pa Lin	Old Sittang Bridge - WWII Ruin	Sampan Travel already organises a trip to the Old Sittang Bridge. The tour included a knowledgeable guide who explains the history of the bridge and a picnic.	The Sittang Bridge was an iron railway bridge spanning several hundred feet across the Sittoung River. (Information: Battle of Sittang Bridge); https://en.wikipedia.org/wiki/Battle_of_Sittang_Bridge	
5	Existing	Mon	Billin	Kyaukhto (It is 6 miles away from Kyaukhto to the nearest northwestern edge of Ayeethima village and 8.5 miles from Billin to the southeastern edge of Thawun Zun)	Kelatha Wildlife Sanctuary	Half day trip to experience the nature at the sanctuary. The trip is happening very rarely.	Kelatha Wildlife Sanctuary is a protected area established in 1942. It harbours 0-355 species of birds.	
6	Existing	Mon	Chaungzon	Billu Island	Day tour on Chaungzon Island			
7	Existing	Mon	Kyaukhto					

EXAMPLES

	Accessibility	Score (1-4)	Infrastructure	Score (1-4)	Sustainable Tourism potential	Score (1-4)	Qualitative Team rating	Score (1-4)	TOTAL SCORE (100 %)
	e.g. time to reach starting point, seasonal flooding issues, road quality leading to site, etc.	Weight: 25 %	(e.g. Accommodation, Restaurants, etc.)	Weight: 25 %	(social, economic and environmental benefits)	Weight: 25 %	With comments why	Weight: 25 %	
Evaluation	Criteria Rating	Access not a major issue and no seasonality issue.	4	Food is provided by villagers. Accommodation is provided in Yangon (tour start).	4	The bike tour presents a tourism product that can bring social and economic benefits, with a minor impact on the environment.	4		3
	1 - Low/bad	Access not a major issue. Chaungzon Island also just got a new road infrastructure.	4	Most foreign tourist sleep in Mawlamyine.	2		4		2.5
	2 - Rather low/bad	Access not a major issue. Potential seasonality issue.	3	1 Guest House available (Moeuyngyi Resort)	3				
	3 - Rather high/good	Access not a major issue. Can be visit all year around.	4	Sittoung Town has basic (touristic) infrastructure	4				
	4 - High/good	Access not a major issue. Potential seasonality issue.	3	No (touristic) infrastructure. Closest town is Kyaukhto					
	Access not a main								

- These screenshots are an example how the initial assessment (long list) was conducted.
- A total of 45 tour operators were interviewed and consulted during the selection process.
- More stakeholders were interviewed via phone or in person such as the Ministry of Hotel and Tourism (MoHT) in Bago Region and Mon State as well as NGOs, CSOs and individual experts.
- Those sites with most potential for tourism development and being in scope with the GoMP were visited during a 10 day site visit.
- The top 7 sites of those visited were presented and discussed with GoMP project team during a workshop in February 2020.
- 3 of those sites were then selected and agreed on for further, in-depth analysis.

The analysis focuses on Community Involvement in Tourism (CIT) and considers Myanmar's Ecotourism policy

Community Based Tourism (CBT)

vs.

Community Involvement in Tourism (CIT)

- CBT is widely understood as the approach to develop community-driven tourism that contributes to the well-being of communities.
- Activities that fall under CBT have to be community-owned and operated, and managed or coordinated at the community level.
- Unfortunately many community-based tourism enterprises do not succeed. They fail to produce significant benefits or do not last beyond initial external funding.

- The core aim of CIT is to enable the local community to gradually gain control over the development and management of tourism activities, with a major proportion of the financial benefits remaining within the local economy.
- Some activities require participatory planning processes, while others, such as enterprise development, may be performed by individuals and families development and management of tourism activities in their region.

- For this analysis we understand that community support and sustainable resource management should be the driving factors for further touristic development.
- However, finding suitable partners on the ground for investment and stimulating demand is seen as a crucial factor for success as well.
- **Therefore CIT will be considered for further analysis as the more “open” approach.**
- **In addition to the above mentioned, *Myanmar's Ecotourism Policy and Management Strategy for Protected Areas 2015 – 2025* is seen as a key policy document for a Myanmar context specific situation analysis and development of recommendations.**

Myanmar's CIT and Ecotourism policy papers suggest different objectives for successful implementation

Time	Objective	Idea / Description	
	1. Strengthen institutional arrangements	Support regional administration in (eco-)tourism planning and actively encourage broad community representation in relevant committees.	✓
	2. Capacity building for intended touristic activities	Design and deliver training programs for local consultants, guides, private and public sector and local communities that meet the needs and enhance the skills of the community.	✓
	3. Develop safeguards, systems and procedures to strengthen community planning and management in (eco-)tourism	Design and implement participatory approaches to destination and community/eco-tourism planning. Views of local residents must be reflected in the planning process.	✓
	4. Encourage the development of tourism enterprises operated by communities and local residents	Support the pro-active marketing and market access of enterprises operated by local individuals. Ensure provision of investment incentives and soft loans.	✓
	5. Diversify and develop quality products and services at community level	Design and implement a series of product development strategies that meet market needs and expectations well-suited to the local context.	✓
	6. Strengthen research and monitoring frameworks	Create metrics system/monitoring framework to measure benefits, as well as positive and adverse impacts.	✓

Sources: Myanmar Ecotourism Policy and Management Strategy for Protected Areas (2015); Policy on Community Involvement in Tourism (CIT) (2013)

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Situation analysis for focal sites

1. Thanattan and Phayar Lay Village

2. Zote Thoke Village, Mhu Tin Village and Kaylartha Mountain

3. Dare Village

1. Thanattan and Phayar Lay Village



Coordinates:

Thanattan Village: 17°20'40.6"N 96°49'00.8"E

Source: Google Maps

Key facts:

- Thanattan is a traditional village with interesting village life (different workshop places) surrounded by a beautiful natural environment.
- It is well connected to the main highway Yangon – Mawlamyine (close to Waw) and roads leading to the village are accessible all year round.
- There is potential for CIT with community members willing to support touristic development.

Local sites and activities:

- Interesting workshop places at Thanattan include: bamboo sheet making (wall/housing), brick production, bean plantation, seasonal vegetable plantation, rice paddy and dry fish production.
- It's located close to Sittaung River and surrounded by canals.
- Possible activities: Village tours, traditional cooking classes, canoe tours, bicycle tours, local village encounters, homestay experiences.
- Possible target group: Active, off the beaten track, basic (not luxury), interest in culture and rural life style, interested in learning about village life.

Impressions from Thanattan and surrounding area



Lunch at local family home



View over Sittaung River



Traditional dish



View over Sittaung Canal

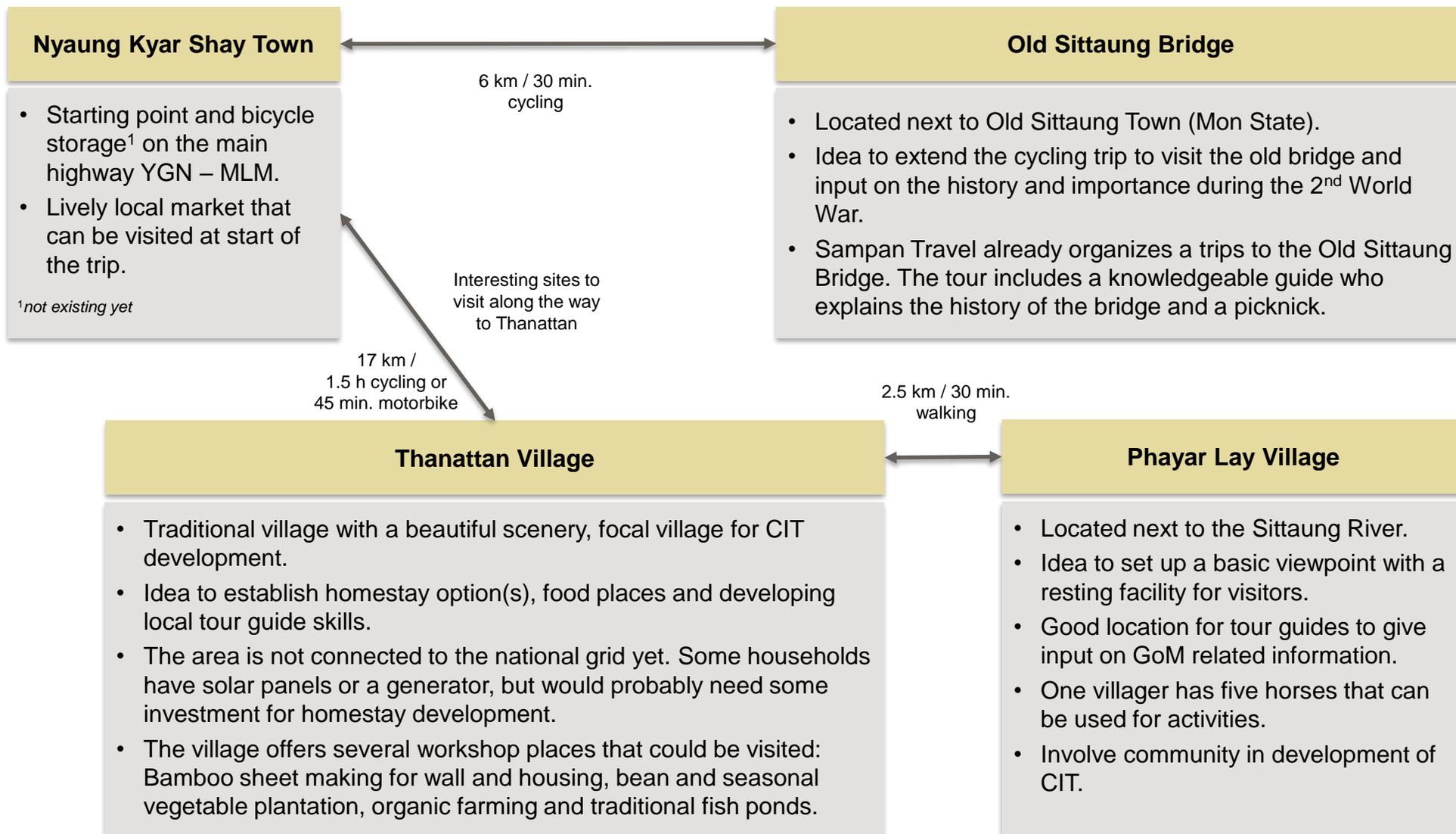


Local cattle breeding



Local cement production place

Tourism development ideas in Thanattan Village with a focus on CIT



Concrete ideas to be considered for successful implementation of CIT development in Thanattan Village (1/2)

1. Strengthen institutional arrangements

- Develop draft concept for CIT development in Thanattan Village, identify relevant stakeholders and possible funding.
- Develop an institutional connection between the Ministry of Hotels and Tourism (MoHT) and local administration. MoHT needs to be informed about the plans to develop tourism infrastructure in and around Thanattan, this is also important to obtain necessary permits to receive foreign tourists.
- Establish the involvement of local communities in tourism as part of local governmental bodies.
- Assign so called Community Involvement Tourism Liaison Officers (CITLO) as coordinators to help facilitate the above.
- Try to have regular meetings with relevant representatives on local level and conduct regular awareness raising and promotion events for CIT development.

2. Capacity building

- Establish awareness in local communities about positive and negative impacts of tourism and types of tourism.
- Provide training workshops for the local community, (potential) tour guides and other stakeholders such as:
 - Environmental and sustainability awareness (with focus on the importance of the sensitive ecosystem of the Gulf of Mottama);
 - Handicraft and quality improvement;
 - Organic food production and farming;
 - Tour guide and hospitality training, including first aid training.
- Provide technical assistance for sustainable tourism planning.

3. Develop safeguards, systems and procedures

- Establish CIT committee that represents the community to utilize land and other resources in the area.
- Agree on guidelines for visitor activities in Thanattan and the surrounding area.
- Develop a code of conduct that needs to be signed by tour operators for visiting and working with the local community.
- Define and implement standards for overnight stays in Thanattan and surrounding villages.

Concrete ideas to be considered for successful implementation of CIT development in Thanattan Village (2/2)

4. Encourage local entrepreneurship through micro and small local enterprises

- Set up minimum standards for licensing requirements and compliance procedures for the tourism enterprises regarding:
 - Accommodation / homestays;
 - Food and beverage places;
 - Activity providers;
 - Local workshop places to receive visitors.
- Develop a program to assist start-up businesses with:
 - Specific information on tourism industry structure;
 - Contacts and market assessment;
 - Connecting them to possible investors.

5. Diversify and developing quality products and services

- Develop a tourism management strategy for Thanattan Village and surrounding area which provides benefits for local people.
- Organize multi-stakeholder workshops to foster partnerships and improve product and service quality that meet market needs.
- Support the development of a sustainable infrastructure (e.g. solar panels and sanitation) to upgrade Thanattan Village as a touristic product as well as to support its community.

6. Monitor positive and adverse impacts of community involvement in tourism

- Set up a monitoring framework for community involvement that can measure:
 - Financial benefits/issues;
 - Environmental benefits/issues;
 - Cultural and social benefits/issues;
 - Organizational issues.
- Establish effective communication and reporting system to inform stakeholders on progress and challenges.
- Develop concrete actions how to promote benefits and mitigate issues that have been identified.

Situation analysis for focal sites

1. Thanattan and Phayar Lay Village

2. Zote Thoke Village, Mhu Tin Village and Kaylartha Mountain

3. Dare Village

2. Zote Thoke Village, Mhu Tin Village and Kaylartha Mountain



Source: Google Maps

Coordinates:

Kaylartha Mountain: 17°13'24.5"N 97°05'31.2"E

Zote Thoke Village: 17°09'37.1"N 97°10'18.0"E

Mhu Tin Village / beach access: 17°08'21.2"N 97°11'51.7"E

Key facts:

- The area around Zote Thoke Village has the potential to offer a diverse range of different touristic activities and being strategically located as a day-trip destination with proximity to Golden Rock, Hpa-An and Mawlamyine.
- Different sites in this area could be promoted as one destination to offer cultural, religious and eco-tourism activities (destination brand development) for both local and international tourists.

Local sites and activities:

- Zote Thoke as the central village of the area offers a variety of ancient and historic places to be discovered, including the (locally) famous Kyaik Htee Saung Pagoda and the ancient city wall and potential excavation sites.
- Kaylartha Mountain and its Pagoda on top is an important Buddhist pilgrimage site that can be considered as an interesting alternative to Golden Rock. Furthermore, the mountain and surrounding area has potential for outdoor activities.
- Mhu Tin Village, closely located to Zote Thoke, comes with direct access to the GoM offering a relatively nice beach, which potentially could serve as a starting point for mudflat related activities.
- Possible target group: pilgrimage tourism, religious tourism, interest in culture and rural life style, interested in nature, outdoor activities, bird watching.

Impressions from Kyaik Htee Saung Pagoda / Ancient City Wall / Zwe Kalar Pagoda



Kyaik Htee Saung Pagoda
Source: Nilar Tun



Ancient city wall at Kyaik Htee Saung Pagoda
Source: Nilar Tun



Ancient city wall at Kyaik Htee Saung Pagoda
Source: Nilar Tun



Zwe Kalar Pagoda (between Zote Thoke and Mhu Tin)
Source: Google Maps, 2018, TZA



Wall at Zwe Kalar Pagoda
Source: Google Maps, 2018, TZA

Impressions from Kaylartha Mountain and Bilin River delta in Mhu Tin Village



House with view on Kaylartha Mountain
Source: Brittney Tun



Steps that lead up to Kaylartha Pagoda
Source: Ye Myat Tun, Discover Myanmar, 2019



Kaylartha Pagoda
Source: Nilar Tun



Kaylartha Mountain and Kaylartha Pagoda
Source: Brittney Tun, Discover Myanmar, 2019



Mhu Tin Village
Source: Nilar Tun

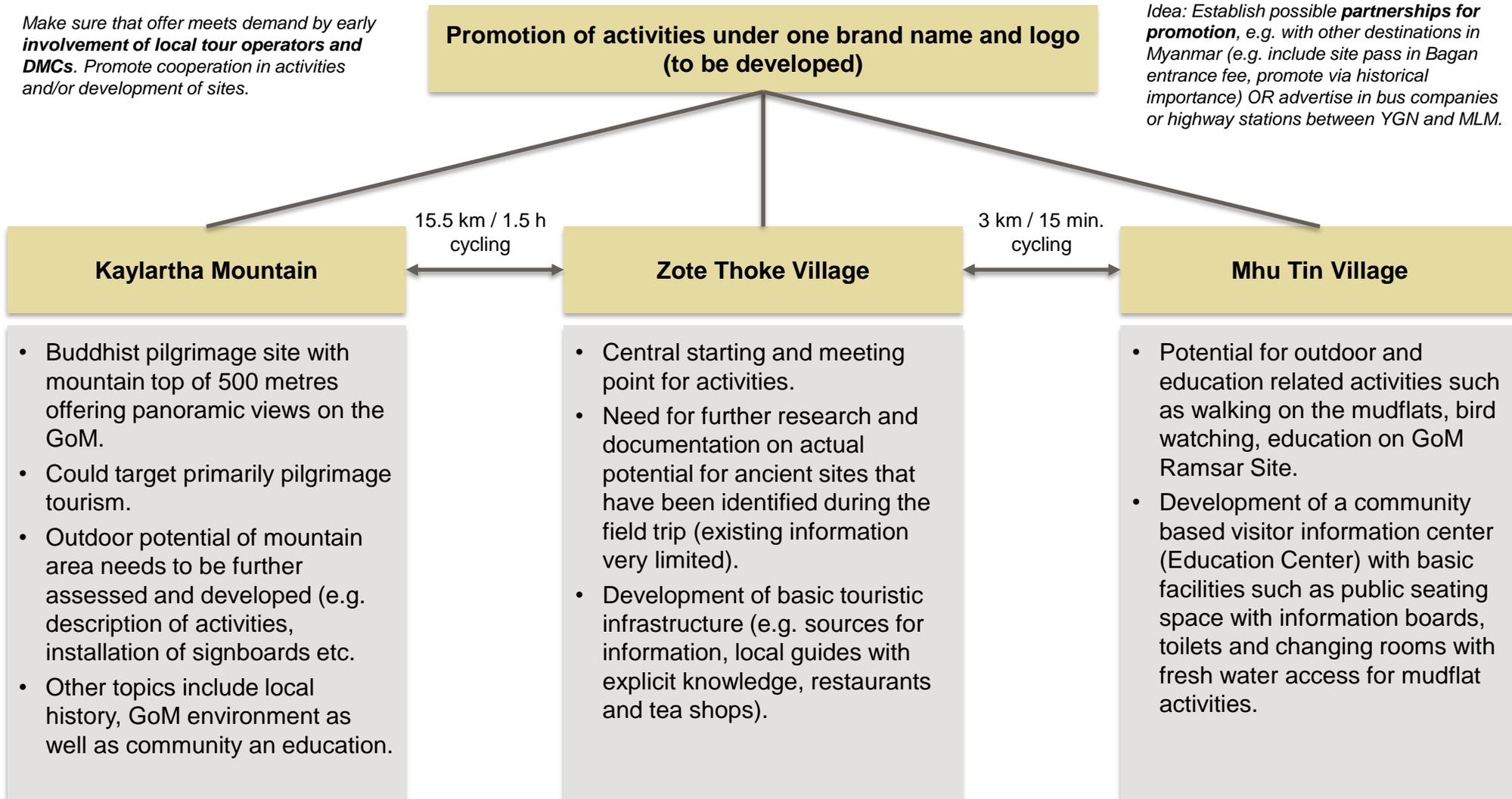


River bank at Mhu Tin Village
Source: Nilar Tun

The area could be promoted as one touristic destination offering various kinds of activities for stop-over tourists.

Make sure that offer meets demand by early **involvement of local tour operators and DMCs**. Promote cooperation in activities and/or development of sites.

Idea: Establish possible **partnerships for promotion**, e.g. with other destinations in Myanmar (e.g. include site pass in Bagan entrance fee, promote via historical importance) OR advertise in bus companies or highway stations between YGN and MLM.



Concrete ideas to be considered for successful implementation of tourism development in the region (1/2)

1. Strengthen institutional arrangements

- Develop a draft eco-tourism planning and management framework that includes community involvement in tourism and identify relevant stakeholder.
- Develop an institutional connection between the Ministry of Hotels and Tourism (MoHT) and local administration.
- Establish the involvement of local communities in tourism as part of local governmental bodies.
- Assign so called Community Involvement Tourism Liaison Officers (CITLO) as coordinators to help facilitate the above.
- Try to have regular meetings with relevant representatives on local level and conduct regular awareness raising and promotion events for CIT and Ecotourism development and monitor training needs.

2. Capacity building

- Raise community awareness of eco-tourism and protected area issues and opportunities.
- Provide training workshops for the local community, tour guides and other stakeholder such as:
 - Environmental and sustainability awareness (with focus on the importance of the sensitive ecosystem of the Gulf of Mottama);
 - General education on GoM eco-system and training of GoM related outdoor activities (bird watching, mudflat walking, etc);
 - Tour guide training, including the ancient history of the area;
 - Training and workshops for Mhu Tin Education Center concept development and implementation.
- Provide technical assistance for sustainable tourism planning.

3. Develop safeguards, systems and procedures

- Establish committee that represents the community to utilize land and other resources in the area.
- Agree on guidelines for visitor activities in Zote Thoke Village, Mhu Tin Village and Kaylartha Mountain.
- Develop a code of conduct that needs to be signed by tour operators for visiting and working with the local community and operating in sensitive eco-sites.
- Develop a system that controls and limits the impact caused by higher and more frequent number of tourists to ensure protection of the conservation values and heritage sites (e.g. limit number of visitors at pilgrimage- and eco-sites).

Concrete ideas to be considered for successful implementation of tourism development in the region (2/2)

4. Encourage local entrepreneurship through micro and small local enterprises

- Set up minimum standards for licensing requirements and compliance procedures for the tourism enterprises regarding:
 - Touristic activities such as mudflat walking, bird-watching or ancient site visits;
 - Food and beverage places;
 - Activity providers.
- Develop a program to assist start-up businesses with:
 - Specific information on tourism industry structure;
 - Contacts and market assessment;
 - Connecting them to possible investors.

5. Diversify and developing quality products and services

- Develop an eco-tourism management strategy which provides benefits for local people and the ecosystem of the Gulf of Mottama.
- Organize multi-stakeholder workshops to foster partnerships and improve product and service quality that meet market needs.
- Promote innovative architecture and infrastructure that harmonize with nature and cultural landscapes, and minimize energy consumption.

6. Monitor positive and adverse impacts of tourism

- Set up a monitoring framework that can measure:
 - Environmental benefits/issues;
 - Community involvement in tourism;
 - Cultural and social benefits/issues;
 - Organizational issues;
 - Financial benefits/issues.
- Establish effective communication and reporting system to inform stakeholders on progress and challenges.
- Develop concrete actions how to promote benefits and mitigate issues that have been identified.

Situation analysis for focal sites

1. Thanattan and Phayar Lay Village

2. Zote Thoke Village, Mhu Tin Village and Kaylartha Mountain

3. Dare Village

3. Dare village



Coordinates:

Dare Village: 16°30'15.7"N 97°29'56.9"E

Source: Google Maps

Key facts:

- Dare is a traditional Mon village on Bilu (Chaungzone) Island with the potential for CIT with community members willing to support touristic development.
- SST Tourism, a tour operator from Yangon with a focus on community tourism already has ideas and sees potential in Dare Village to support development of CIT.
- The village is easily accessible from Mawlamyine via the new Chaungzone bridge (from 2017) and a paved road (approx. 1.5 h).

Local sites and activities:

- The village is located right next to the shore and a little mountain offering great views, surrounded by the sea and farmland / wetland. Combined with a traditional Mon style architecture of many homes and a relatively clean environment, makes the location attractive for visitors.
- The village offer a small, private museum which also operates as a community center where visitors are being met and welcomed.
- Possible activities include: Village tour, traditional Mon life, boat tours, fishing and crab catching, bird watching, smaller hiking options, museum visit, local village encounters.

Impressions from Dare Village and surrounding area



Local museum – view from entrance



View from village overlooking paddy fields and sea



View from house mountain overlooking bay



Local museum inside one room with owner



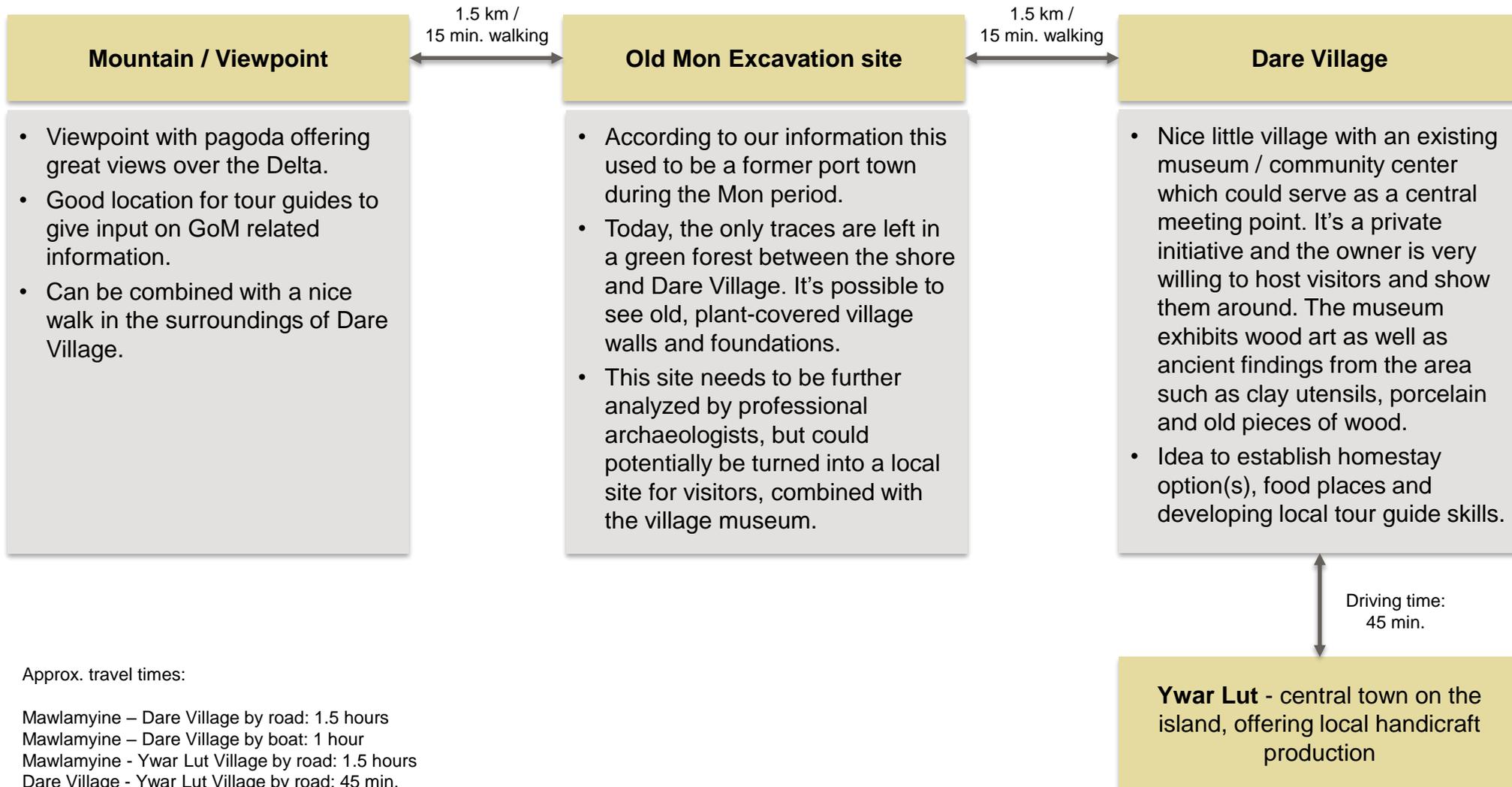
Rubber band production facility 30 min. drive away



Slate production facility 45 min. drive away

Sources: Nilar Tun and Simon Wette

Tourism development ideas in Dare Village with a focus on CIT



Concrete ideas to be considered for successful implementation of CIT development in Dare Village (1/2)

1. Strengthen institutional arrangements

- Develop draft concept for CIT development in Dare Village, identify relevant stakeholders and possible funding.
- Develop an institutional connection between the Ministry of Hotels and Tourism (MoHT) and local administration. MoHT Mon State needs to be informed about the plans to develop tourism infrastructure in Dare Village, this is also important to obtain necessary permits to receive foreign tourists.
- Establish the involvement of the local community in tourism as part of local governmental bodies.
- Assign Community Involvement Tourism Liaison Officers (CITLO) as coordinators to help facilitate the above.
- Try to have regular meetings with relevant representatives on local level and conduct regular awareness raising and promotion events for CIT development.

2. Capacity building

- Provide tourism awareness training in Dare Village.
- Provide technical assistance for: tourism planning, particularly English-language, first aid, energy and emergency management and service, marketing and management in tourism.
- Establish education program on environmental and sustainability awareness, waste management and a focus on the importance of the ecosystem of the Gulf of Mottama.
- Provide training for local handicraft and quality improvement on organic food production and farming.
- Develop concept and offer trainings for local tour guides, homestays and food places.
- Organize scoping mission with archaeological experts and local stakeholder to assess situation and potential of ancient Mon site.

3. Develop safeguards, systems and procedures

- Establish CIT committee that represents the community to utilize land and other resources in the area.
- Agree on guidelines for visitor activities in Dare Village and the surrounding area.
- Develop a code of conduct that needs to be signed by tour operators for visiting and working with the local community.
- Define and implement standards for overnight stays in Dare Village and surrounding villages.

Concrete ideas to be considered for successful implementation of CIT development in Dare Village (2/2)

4. Encourage local entrepreneurship through micro and small local enterprises

- Set up minimum standards for licensing requirements and compliance procedures for the tourism enterprises regarding:
 - Accommodation / homestays;
 - Food and beverage places;
 - Activity providers;
 - Local Workshop places to receive visitors.
- Develop a program to assist start-up businesses with:
 - Specific information on tourism industry structure;
 - Contacts and market assessment;
 - Connecting them to possible investors.

5. Diversify and developing quality products and services

- Developing a tourism management strategy for Dare Village which provides benefits for local people.
- Organise multi-stakeholder workshops to foster partnerships and improve product and service quality that meet market needs.
- Support the sustainable development of appropriate infrastructure (roads and accessibility, electricity, water, sanitation) to enrich Dare Village as a tourism product as well as enrich the community.

6. Monitor positive and adverse impacts of community involvement in tourism

- Set up a monitoring framework for community involvement that can measure:
 - Financial benefits/issues;
 - Environmental benefits/issues;
 - Cultural and social benefits/issues;
 - Organizational issues.
- Establish effective communication and reporting system to inform stakeholders on progress and challenges.
- Develop concrete actions how to promote benefits and mitigate issues that have been identified.

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To conclude this study there are a few points we would like to highlight:

- We've been talking to local and international experts to discuss about touristic activities of rather special interest, such as surfing on the tidal wave, surfing in general, fly fishing, dolphin watching, rare bird watching (e.g. spoon-billed sandpiper) or mud flat related activities. They all have in common that these activities (or very similar ones) can be offered at other destinations in Myanmar or in the region under better conditions and with easier access. There is no doubt the GoM is a unique ecosystem that could offer unique experiences. However, general level of infrastructure is still very low. Finding investors and creating the demand that would be needed for the investment being worth it, is seen as a big challenge.
- Demand in the focal area (east Bago Region and Mon State) in general seems relatively low and the majority of visitors focus on one of the three existing main touristic sites Bago, Mawlamyine or Golden Rock. Or they would just use the highway between Yangon and Mawlamyine to continue to either Hpa-An in Kayin State and beyond (Thai boarder) or to the far south of Myanmar – Tanintharyi region – with its unique selling proposition: Beaches with clear, turquoise water compared to the GoM with its permanently muddy water full of sediments. Therefore, our recommendation would be to trying to absorb existing demand for newly developed activities and sites (spill-over effects) in the GoM region.
- We think that a cooperation with different local tour operators and discussions with other relevant stakeholders at an early stage of the project development cycle is crucial, also to understand the needs of the (potential) tourists and different target groups, geographically and by interest.
- We recommend to start with and focus on one of the suggested sites from our situation analysis. Proceed with further assessment of the site while considering the concrete ideas provided. The respective situation analysis should potentially serve as an orientation while developing a proposal to receive funding and identify potential partners for cooperation to implement the project.

Bago city, Golden Rock and Mawlamyine as touristic sites were not in scope of the study

We did not put our focus on the main touristic sites in the project area: Bago City, Golden Rock and Mawlamyine. Those sites already receive a significant number of visitors each year:

- **Bago:** The city receives relatively high number of local and Thai visitors who focus on religious sites in and around the former Mon capital. We estimate a significant part of these visitors also traveling to Hpa-An and Mawlamyine and on the way these people could potentially enjoy stop-over activities in Zote Thoke Village and/or Kaylartha Mountain.
- **Golden Rock** (Kyaiktiyo Pagoda) is among the most important and most frequented Buddhist pilgrimage sites in Myanmar and therefore receives high volume of visitors, most importantly Buddhist pilgrim from Myanmar and other Buddhist countries in the region, but also other visitors from around the world. Strategically located next to a protected nature reserve still to be discovered and on the way to other prime tourist locations in Myanmar we do see more touristic potential for this site. However, this needs to be assessed in detail what kind of new or existing activities can be offered.
- **Mawlamyine**, capital of Mon State, has seen major touristic infrastructure development during the past years. We do see great potential in its colonial legacy being an urban touristic destination in Myanmar. Unfortunately, bureaucracy is still hindering touristic development as colonial buildings currently cannot be used or renovated for any purpose. The city is strategically well located and we do see more potential for stop-over tourism as well as being a central starting/ending point for activities in the nearby region, for example to Chaungzone Island that will hopefully start receiving more visitors in the near future.

This study is a first assessment to analyse the (eco-)tourism potential in the Gulf of Mottama. Due to limited time and resources there are limitations of the study that need to be pointed out:

- Not all of the identified sites that might have potential could be visited during our 10 day field visit. However, a significant area that is closely located to the GoM could be visited and be considered in the study.
- The focus was to identify potential new touristic sites and activities that can be aligned with the key outcomes of the ongoing Gulf of Mottama project led by Helvetas.
- The draft budget planning of the proposed sites in the situation analysis shall give an idea of major direct costs that might occur if planned accordingly. Project overhead and other indirect costs are not being considered. Furthermore, we did not project any revenues or visitor arrivals in this first assessment.
- We did not consider any potential threats such as the newly occurred COVID-19 that might totally change the situation. In general, the situation always needs to be re-assessed while planning and implementing the project.

Follow-Up Workshops – January 7, 2021

- **Format: Interactive / Discussion style, outcome driven**
- **Language: English and/or Burmese**
- **Focus on specific site or activity/event (different workshops sessions)**
- **Registration possible → Provide contact details and suggestions for WS-topics**
- **Click here to register**

Contact Details

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