



# Data Collection Survey on Recovery of Tourism affected by COVID-19 in the Republic of Maldives

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## 1. Introducing the COVID-19 Tourism Recovery Technical Assistance Package

The first five months of 2022 saw international arrivals reaching almost half (46%) the levels of the same period of 2019. Overnight visitors more than tripled (+221%) in January-May 2022 over 2021, and other relevant tourism indicators such as tourism spending from major source markets, global hotel occupancy rates and international air capacity are slowly returning to pre-pandemic levels.<sup>1</sup> Despite remaining global uncertainties, gradual recovery is underway in most parts of the world.

Bearing in mind that global tourism suffered its worst year on record in 2020, with international arrivals dropping by 74% and destinations welcoming 1 billion fewer international arrivals, which translated into an approximate loss of USD 1.3 trillion in export revenues - more than 11 times the loss recorded during the 2009 global economic crisis – directly threatening around 100 and 120 million tourism jobs<sup>2</sup>, a sharp decline that was only partially stopped during 2021<sup>3</sup>, recovery signs, albeit timid, are to be welcomed.

However, higher-than-expected inflation and rising interest rates, geopolitical tensions, in addition to an unequal recovery of global tourism numbers, give force to predictions whereby a true recovery cannot realistically be expected before the 2023-24 period<sup>4</sup>.

As for regional results, all world regions enjoyed a significant rebound in the first five months of 2022, led by Europe and the Americas, while Asia and the Pacific saw arrivals almost double between January and May 2022. Notwithstanding these positive results, tourism in Asia and the Pacific remains 90% below 2019 levels, primarily due to continued closure of borders to non-essential travel in major markets

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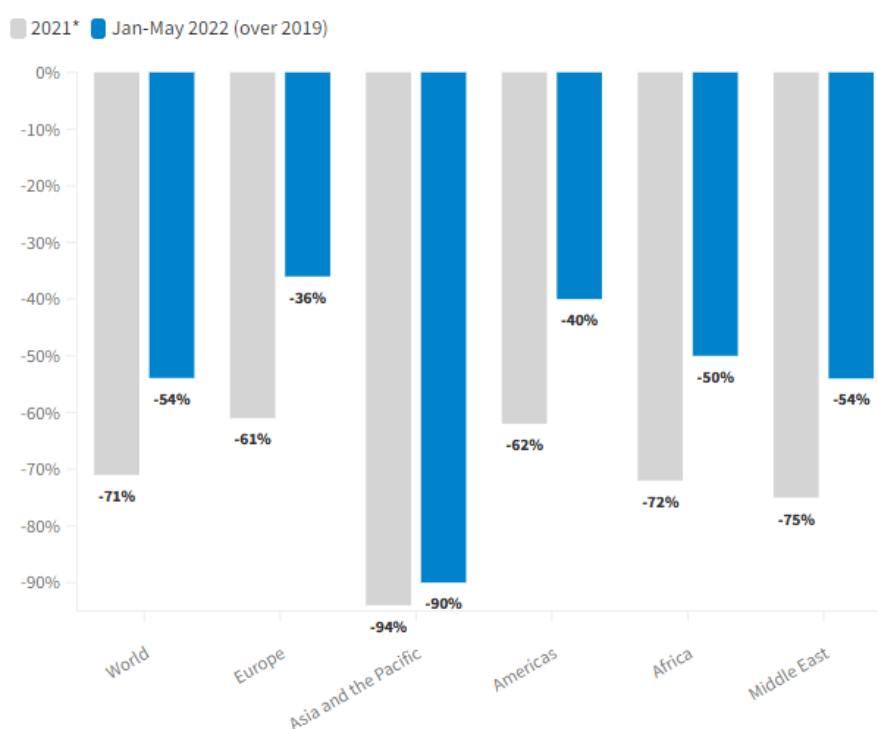
<sup>1</sup> UNWTO World Tourism Barometer, Volume 20, Issue 4, July 2022

<sup>2</sup> UNWTO World Tourism Barometer, Volume 20, Issue 1, January 2022

<sup>3</sup> According to UNWTO's Tourism Barometer of January 2022, while international tourism experienced a 4% increase – that is, 15 million more international tourist arrivals compared to 2020 (415 million versus 400 million) – international arrivals were still 72% below the pre-pandemic year of 2019

<sup>4</sup> See: <https://www.unwto.org/impact-assessment-of-the-covid-19-outbreak-on-international-tourism>

## International Tourist Arrivals



Source: World Tourism Organization (UNWTO) ©. \* Change over 2019 (provisional data)  
Data as collected by UNWTO, July 2022. Published: 01/08/2022

Figure 1 International Tourist Arrivals Data from July 2022

In regard to the Maldives, while 2021 saw an important increase in international arrivals compared to 2019, a year that closed with a decline of 67%, international tourism remained 22% below pre-pandemic figures<sup>5</sup>. International tourism expenditure also halved in 2021<sup>6</sup>, and yet, with 2022 results still in need of being accounted for – which will surely share a positive light on the country –, the Maldives was able to fare better throughout the pandemic than most of its regional competitors, as can be seen in Table 1 below.

International Tourist Arrivals by (sub)region and selected countries and territories of destination																					
Series	(1000)			Change (%)				Change (%)*													
	2019	2020*	2021*	19/18	20/19	21/20*	21/19*	2022 over 2021 <sup>1</sup>					2022 over 2019								
	Series	YTD <sup>2</sup>	Jan.	Feb.	Mar.	Apr.	May	YTD <sup>2</sup>	Jan.	Feb.	Mar.	Apr.	May								
<b>South Asia</b>	33,748	9,749	5,720	7.5	-71.1	-41.3	-83.1	215	119	143	171	215	677	-59.4	-74.3	-70.8	-59.3	-47.5	-35.4		
Afghanistan	..	..	..	..	..	..	..	TF													
Bangladesh	TF	323	168	..	21.0	-48.0	..	TF													
Bhutan	TF	316	30	..	15.1	-90.6	..	TF						-99.8					-99.6		
India	TF	17,914	6,330	..	2.8	-64.7	..	TF	266	140	142	178	255	↑	-65.0	-81.9	-77.9	-65.0	-49.3	-31.1	
Iran	VF	9,073	1,550	..	24.4	-82.9	..	VF													
<b>Maldives</b>	TF	1,703	555	1,322	14.7	-67.4	138.0	-22.4	TF	48	43	54	38	59		-10.7	-13.1	-11.6	-7.4	-10.9	
Nepal	TF	1,197	230	150	2.1	-80.8	-34.9	-87.5	TF	235	91	116	180	160	↑	-61.8	-79.1	-80.7	-67.0	-46.7	-31.6
Pakistan	TF	..	..	..	..	..	..	TF													
Sri Lanka	TF	1,914	508	194	-18.0	-73.5	-61.7	-89.8	TF	↑	↑	↑	↑	↑	↑	-60.0	-66.3	-61.7	-56.4	-62.3	-20.1

Source: World Tourism Organization (UNWTO)

(Data as collected by UNWTO, July 2022)

<sup>1</sup> Arrows (↑) indicate percentage change above 1000. (See Methodological Notes)

\* Provisional data

<sup>2</sup> YTD figures for destinations with no monthly data refer to Q1

See box in page 'Annex-1' for explanation of abbreviations and symbols used

Table 1 International Tourist Arrivals in Maldives compared to Regional Competitors (2019-2022)

<sup>5</sup> UNWTO World Tourism Barometer, Volume 20, Issue 4, July 2022, Statistical Annex.

<sup>6</sup> See UNWTO's Tourism Barometer: <https://www.unwto.org/unwto-world-tourism-barometer-data>

Prior to the COVID-19 pandemic, tourism represented 30% of the world's exports of services (US\$ 1.5 trillion) and up to 45% of the total export of services in developing countries, so, inevitably, this long-lasting crisis continues to have an impact on the livelihoods of millions of people and threatens to roll back Sustainable Development Goals (SDGs) progress.

From the beginning, UNWTO was clear in its message: the containment of the pandemic, at whatever cost, was fundamental. Such message was never intended, however, to signify global discord or a breakdown in communication. Cooperation, be it in investigation, the maintenance of financial and trade links or the development of common health and safety protocols and measures allowed us to continue operating, albeit limited by the "new normal". Moreover, with time, UNWTO was also able to finetune its crisis-response mechanisms.

As the leading international organization in the field of tourism, UNWTO's primary aim was to ensure that communication channels among our members and additional stakeholders from the public and private sector remained open. Confronted with global uncertainty, information exchange and the maintenance of trust proved essential<sup>7</sup>.

This was followed by efforts to quantify, as far as possible, the impact of COVID-19 on tourism. Tourism dashboards and a move towards digitalization, together with traditional statistical tools, have proven helpful in gaining insight to the impact of the pandemic and recovery needs. Furthermore, aligned with other international partners, UNWTO has been working to channel much needed funding and expertise, such as the project with Japan International Cooperation Agency (JICA) in the Maldives, which has been implemented under UNWTO's COVID-19 Tourism Recovery Technical Assistance Package launched in May 2020. Of short-, medium- and long-term scope and designed with the entire tourism value chain in mind, projects are currently ongoing on a global scale and highlight the role of tourism as a central economic pillar.

As UNWTO's COVID-19 Tourism Recovery Technical Assistance Package makes clear by focusing on three key development areas – Economic Recovery; Marketing and Promotion; and Institutional Strengthening and Resilience Building<sup>8</sup> – full global recovery can only be assured together with a responsible and sustainable tourism sector. Expenditure by visitors on accommodation, food and drink, local transport, entertainment, and shopping, in addition to its impact on issues ranging from regional development to visa facilitation, communications and transportation, favor long-term economic return and a multiplier effect on the economy, so no matter the economic classification of countries – low, middle or high income – tourism's contribution must be considered multi-layered and cross-sectoral.

Ultimately, a crisis inevitably exposes systemic weaknesses, something inherent to both developing and developed countries, so it is vital to utilize available resources wisely. By jointly cooperating with JICA on this technical assistance project, it has been UNWTO's intention to make the most of identified tourism opportunities within the country. In the following, a recap of project activities will be presented together with future recommendations – all intended to position the Maldives as a leading tourism destination within a highly globalized world context.

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<sup>7</sup> For an overview of UNWTO's crisis response, see: <https://www.unwto.org/tourism-covid-19>

<sup>8</sup> For a full overview, see: [https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/COVID-19-Tourism-Recovery-TA-Package\\_8%20May-2020.pdf](https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/COVID-19-Tourism-Recovery-TA-Package_8%20May-2020.pdf)

## 2. Summary of the COVID-19 Tourism Recovery Technical Assistance Activities included in the project for the Republic of Maldives

UNWTO and the Government of the Maldives, with the support of the Japan International Cooperation Agency (JICA) are collaborating on a project, titled “Data Collection Survey on Recovery of Tourism affected by COVID-19” in the Maldives. The project aims to help accelerate tourism recovery in the Maldives based on the UNWTO’s technical assistance package for extending advice to Member States on promoting recovery of the tourism activity in the framework of the COVID-19 pandemic, regaining consumer confidence, and building resilience in the tourism sector. Furthermore, this project benefits from the Japanese experience of tourism recovery from a big shock like disaster. The project in the Maldives includes three components as follows: Component 1) Measurement of the current situation of the tourism sector; Component 2) Development of a country-specific Tourism Recovery Plan; and Component 3) Recommendations on how to achieve the Plan in collaborative manner. The approach used for the implementation of each component, together with the objectives for the components as formulated in the project proposal, are presented below.

### ***Component 1. Measurement of the current situation of the tourism sector***

During the initial stage of Component 1, the expert team reviewed the outcome of the COVID-19 impact assessment prepared by Ministry of Tourism (MoT), and undertook a complete mapping of tourism data availability. Subsequently, the expert team worked with the Ministry of Tourism to review the national tourism statistics system and to introduce mechanisms to strengthen continued measurement and dissemination of the impact of the COVID-19 pandemic over the short and medium terms. The expert team also assessed the results achieved since the re-opening of the tourism sector after the lockdown and studied the support provided by other donors to the tourism recovery process of the Maldives.

#### *Objectives:*

- Carry out a comprehensive review of the outcome of the COVID-19 impact assessment prepared by Ministry of Tourism and undertake a complete mapping of tourism data availability.
- Work with the Ministry of Tourism to review the national tourism statistics system and to introduce mechanisms to strengthen continued measurement and dissemination of the impact of the Covid-19 pandemic over the short and medium terms and for assessing the results achieved since the re-opening of the tourism sector after the lockdown.
- Study the support provided by other donors to the tourism recovery process of the Maldives.
- Prepare a comprehensive report on the measurement of the current situation of the tourism sector

### ***Component 2. Development of the draft of Country-specific Tourism Recovery Plan***

The development of the Country-specific Tourism Recovery Plan was built on the outcome of Component 1, and the findings were used to develop tourism forecasts and scenario planning for the recovery of the tourism sector, which served as a basis to identify and propose support actions to facilitate tourism recovery in line with the forecasts and scenarios. To prepare the tourism recovery plan, the expert team reviewed the tourism recovery initiatives undertaken by the Ministry of Tourism and produced a comparative analysis of regional/international benchmarking of tourism recovery measures. The expert team paid specific attention to ICT readiness, e-marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient

the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain.

Based on this review, the plan presented a detailed analysis of tourism recovery initiatives implemented by the Ministry of Tourism and other Government entities and presented detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID- 19 pandemic on the tourism sector and accelerate the recovery process.

*Objectives:*

- Based on the findings and outcome of Component 1, develop tourism forecasts and scenario planning for the recovery of the tourism sector, which will serve as a basis to identify and propose support actions to facilitate tourism recovery in line with the forecasts and scenarios
- Carry out a review of the tourism recovery initiatives undertaken by the Ministry of Tourism and conduct a comparative analysis of regional/international benchmarking of tourism recovery measures, paying specific attention to ICT readiness, e-marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain.
- Present a detailed analysis of tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.

***Component 3. Recommendations to JICA***

The detailed report presented in Appendix 8 presents recommendations on further support that JICA may provide to the Maldives in the tourism recovery process was prepared based on an assessment of the actions presented in the Tourism Recovery Plan and where donor assistance could in particular be relevant and feasible. Based on Japan's comparative advantage on providing development assistance in the South Asian region and JICA's priorities for Maldives, specific recommendation to JICA are presented regarding selected tourism recovery projects that JICA could support in the Maldives, where possible in collaboration with UNWTO.

*Objectives:*

- Make specific recommendations to JICA regarding selected tourism recovery projects that JICA could support in the Maldives, where possible in collaboration with UNWTO, based on the findings and outcome of Component 1 and 2 as well as Japan's comparative advantage on providing development assistance in the South Asia region and JICA's priorities for Maldives.
- Prepare a comprehensive report to JICA with recommendations on the further support that JICA can provide to the Maldives in the tourism recovery process.



## 2.1. Project Management and Implementation

Throughout 2020, UNWTO and JICA have actively collaborated and liaised with the Ministry of Tourism of the Maldives (MoT) to prepare the project document. Following the completion of the final project document, JICA and UNWTO signed a project agreement in February 2021, with an expiry date of 31 December 2021. In December 2021, the project agreement was amended to extend the period of project implementation and reporting to December 2022.

Immediately upon signature of the agreement, UNWTO started actively working on the implementation of the project. In the first semester of 2021, UNWTO officials exchanged information and held various online meetings with representatives from JICA and the MoT to exchange information on the planning and implementation of the project, including the project inception meeting on 6 April 2021 with participation from JICA, the MoT and UNWTO. Based on the feedback received during the inception meeting, UNWTO prepared the final version of the inception report (Appendix 1) that was approved by the MoT and JICA.

In May 2021, UNWTO launched the procurement process to hire a company to collaborate with for the implementation of the project. UNWTO prepared detailed task descriptions for the technical assistance to be delivered by a team of different national and international experts on each of the project components. In September 2021, UNWTO completed the review of the different offers received from interested companies and selected an expert team to collaborate with on the implementation of the project. The expert team consisted of four international experts: a Team Leader and International Tourism Strategic Planner, an International Measurement Expert, an International Marketing Expert, and an International Tourism HR and Quality Expert, all of whom has had ample work experience in various countries in the world in their respective fields or work for this project. Further, a national expert was part of the expert team to provide relevant inputs and background information on the local context.

- Component 1 of the project was implemented with the support of the Measurement Expert in collaboration with the Tourism Strategic Planner (international) and the national tourism expert.
- Component 2 was implemented with the support of the Tourism Strategic Planner (international) in collaboration with the Marketing, Incentives and Market Trends Expert (international), the Tourism HR and Quality Expert (international) and the national tourism expert.
- Component 3 was implemented with the support of the Tourism Strategic Planner (international) in collaboration with the Measurement Expert (international), the Marketing, Incentives and Market Trends Expert (international), and the Tourism HR and Quality Expert (international).

UNWTO officials provided active guidance, supervision and technical inputs to the implementation of each component.

In parallel, arrangements were made with MoT to issue a letter guaranteeing the privileges and immunities of UNWTO during project implementation. Upon receipt of the letter, UNWTO signed the agreement with the selected expert team and immediate arrangements were organized for planning and implementation of project activities with the company and other stakeholders.

On 4 November 2021, a project coordination meeting took place with representatives from the MoT, JICA, UNWTO and the expert team. The proposed project workplan was presented and discussed and information on technical and logistical aspects relevant for project implementation were exchanged. Based on the feedback received during the coordination meeting, a revised project work plan was prepared and shared with MoT (Appendix 2). The work plan clearly defined the main actions to be undertaken for the implementation of each

project component, including time schedules for desk research, online meetings, field missions, seminars to be delivered and reports to be submitted.

The implementation of the project consisted the team of international experts, who undertook field missions to the Maldives, and the national expert. The national expert conducted presential meetings with tourism stakeholders in the Republic of the Maldives on a regular basis, and played an active role in collecting information, sharing local insights, setting up virtual meetings, organizing workshops and seminars, and planning and accompanying the international experts during their field missions. The international experts undertook the following missions to the Maldives:

- Team Leader and International Tourism Strategic Planner:
  - o Mission 1: 31st January – 14th February 2022
  - o Mission 2: 20th May – 1st June 2022
- International Measurement Expert:
  - o Mission 1: 28th January – 8th February 2022
  - o Mission 2: 21st – 25th May 2022
- International Marketing Expert:
  - o Mission 1: 05th – 18th February 2022
  - o Mission 2: 21st – 27th May 2022
- International Tourism HR and Quality Expert:
  - o Mission 1: 29th January – 11th February 2022

During the various missions carried out by UNWTO officials and international experts, site visits, consultation meetings and workshops were organized in the following destinations:

<b>Date of Visit</b>	<b>Island / Resort</b>	<b>Outcomes</b>
4th February 2022	K.Himmafushi (local inhabited island, Kaafu Atoll)	<ul style="list-style-type: none"> <li>• Local island tourism and guesthouse assessment</li> <li>• Meeting with local council and women’s development committee</li> </ul>
5th February 2022	Banyan Tree Vabbinfaru (Resort, Kaafu Atoll)	<ul style="list-style-type: none"> <li>• Meeting with resort’s General Manager and management team</li> <li>• Discussions on resource conservation projects</li> <li>• Local community engagement Initiatives conducted by the resort</li> </ul>
10th February 2022	JOALI Maldives (Resort, Raa Atoll)	<ul style="list-style-type: none"> <li>• Meeting with resort’s General Manager and management team</li> <li>• Discussions on resort operations, sales and marketing, community initiatives</li> </ul>
11th – 12th February 2022	K.Maafushi (local inhabited island, Kaafu Atoll)	<ul style="list-style-type: none"> <li>• Meeting with the President of NHGAM (National Hotel and Guesthouse Association of Maldives)</li> <li>• Meeting with guesthouse managers and tourism operators</li> </ul>
11th – 13th February 2022	ADh.Maamigili ADh.Dhigurah ADh.Fenfushi (local inhabited islands, Alif Dhaalu Atoll)	<ul style="list-style-type: none"> <li>• Meetings with council members</li> <li>• Meetings with guesthouse managers</li> <li>• Meeting with tourism operators</li> <li>• Visit to historical sites</li> </ul>
19th February 2022	K. Thulusdhoo (local inhabited island, Kaafu Atoll)	<ul style="list-style-type: none"> <li>• Meetings with guesthouse managers</li> <li>• Meeting with tourism operators</li> </ul>

28th – 30th May 2022	S. Gan (local inhabited island city, Seenu Atoll)	<ul style="list-style-type: none"> <li>• Meeting with council members</li> <li>• Meeting with nature park management team</li> <li>• Meeting with women’s development committee</li> <li>• Visit to historical sites</li> </ul>
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Based on the findings presented in the draft tourism recovery plan and in consultation with the MoT and JICA, four capacity building workshops were delivered throughout the course of the project on topics related to e-marketing and statistics. The workshops were targeted to officials who work on the subject matter on a regular basis.

The technical workshops which build on capacity building needs identified in the tourism recovery plan specifically addressed (i) the development and management of the new islands.mv website; (ii) easy and effective forms of marketing of tourism to inhabited islands; (iii) the measurement of the impact of tourism to inhabited islands; and (iv) opportunities to elaborate the tourism exit survey, collecting especially more data on tourist expenditure. The workshops took place on the following dates:

- 22 May 2022, Workshop ‘Developing Successful Marketing for islands.mv’.
- 24 May 2022, Workshop ‘Exit Survey Methodology’.
- 25 May 2022, Workshop ‘Increasing Tourism through Effective Marketing of Local Inhabited Islands’.
- 26 May 2022, Workshop ‘Regional Economic Impact Assessment’.

The proposals of the workshops, the list of participants and the presentation materials used during the workshops are included in Appendix 3.

UNWTO officials undertook the following missions to the Republic of Maldives to review, discuss progress, participate in selected workshops and seminars, and provide technical inputs and guidance:

- 31 January – 08 February 2022 by the Manager of the Technical Cooperation and Silk Road Department and the Project Specialist of the Technical Cooperation and Silk Road Department.
- 20 May – 01 June 2022 by the Manager of the Technical Cooperation and Silk Road Department and the Technical Coordinator of the Institutional Relations and Partnership Department.

From UNWTO, the Manager and Project Specialist from the Technical Cooperation and Silk Road Department, and the Technical Coordinator from the Institutional Relations and Partnerships Department have actively collaborated with the MoT, JICA and the expert team to plan and carry out project activities to ensure that all outputs are delivered in a timely and effective manner.

UNWTO officials were actively involved throughout the overall project implementation. Tasks included project management; providing technical inputs and feedback to the reports prepared for each project component, liaising between the project partners, MoT, JICA, and any other identified project partners; logistical assistance; contacting relevant project partners and outside partner institutions; and other supportive tasks, including preparing the inception report and final project report for JICA.

Furthermore, the Technical Coordinator of the Institutional Relations and Partnerships Department provided active project preparation and implementation support, including liaising with JICA on logistical and administrative matters, together with selected UNWTO colleagues from administrative departments, such as the Legal and Finance Departments.

A Project Steering Committee was appointed to guide and oversee the implementation of all proposed activities and regulate all matters relating to the implementation of the deliverables. Meetings of the Project Steering Committee were held in Male on 2 February 2022 (Meeting Agenda is included in Appendix 4 and Meeting notes are included in Appendix 5) and on 22 May 2022 (Meeting Agenda is included in Appendix 6).

The Project Steering Committee was co-chaired by the MoT and JICA, with participation from UNWTO representatives. As input for the Steering Committee Meeting on 22 May 2022, UNWTO prepared an Indicative Summary of the Tourism Recovery Plan, which was shared with the MoT and JICA prior to the meeting. During the meeting, the Deputy Minister of Tourism of the Maldives expressed his appreciation for receiving the Indicative Summary well in advance and confirmed that it covered relevant topics and recommendations to provide guidance to the tourism recovery process and the further sustainable development of tourism in the Maldives. A copy of the Indicative Summary is included in Appendix 7.

## 2.2. Final project outputs and recommendations

The final outputs and recommendations for each of the three components are presented below:

### ***Component 1. Measurement of the current situation of the tourism sector***

The Measurement of the current situation of the tourism sector component reviews the national tourism statistics system, followed by an assessment of the COVID-19 impacts on the tourism sector of the Maldives. The report also presents an overview of donor-funded tourism projects in the Maldives and provides recommendations, both to strengthen the demand and supply side data, as well as some institutional issues.

The study for Component 1 provides an assessment of the current system of tourism-related statistics in place in the Maldives. A specific focus is on institutions in charge of collecting and analyzing data, dissemination of data for use by other stakeholders, processes of data collection, and gaps that should be addressed so as to ensure a better monitoring of tourism – a precondition for successful tourism planning and management. The national statistics system of the Republic of Maldives with regard to relevant tourism statistics is considered quite comprehensive, yet fragmented, with many institutions involved in collecting data related to tourism development. Possibilities exist to further streamline and improve data collection and data sharing.

The study assessed the main tourism statistics products from demand and supply side perspectives. Generally, it was concluded that the amount of available information on the demand side, as well as the rate of updating, can be considered substantial. However, data quality is considered partly questionable, notably the monthly statistical reports submitted by licensed tourism facilities and the annual or biannual visitor survey that should provide an important source of information on international tourists' sociodemographic data, behaviour, motivation and satisfaction. Both the survey instrument itself (i.e., the questionnaire), and the data preparation including processing and analysis could still be improved.

On the supply side, response rates from guesthouses were notably much lower than from resorts, which provide challenges to collect accurate data on the performance of the guesthouse sector. In general, data on existing licensed tourism facilities can be considered exhaustive, since information (e.g., on capacity) is taken from the tourism license database. However, information on the existing grey market is still very scarce, and on this basis, it would be recommended to conduct more studies in this regard.

Based on the research carried out for Component 1, the main recommendations made, as presented in the report, are:

- **Demand side data: recommendations**

- Tourist arrival numbers derived from border control (Maldives Immigration)

→ Recommendation: data from the IMUGA system, which is the Maldives online platform for immigration services where tourists have to fill in mandatory arrival and departure forms that include, inter alia, questions regarding places and length of stay. In this way, more information than only visitor numbers and nationalities is collected. It is recommended to make full use of existing data from arrival and notably departure forms, e.g. with regard to places and length of stay, and other tourist behavior patterns.

→ Ideally, this data should be publicly available in anonymized form for analyses, e.g. by businesses or research institutions.

- Statistical reports from tourism businesses (MoT)

→ It is recommended to increase communication on the importance and procedures of statistical reporting. In this regard, close cooperation with industry representatives and associations, e.g. the Maldives Association of Tourism Industry (MATI) or the Guesthouse Association of Maldives (GAM), as well as local councils, is advised.

→ Ideally, electronic submission could be enabled through a mobile app with monthly reminders.

→ Another, although more costly option would be the automatic submission in compliance with existing data protection laws through an online system, e.g. comparable to the eSTATISTIK.core system used in Germany. However, development and implementation of such a system goes beyond the scope of this project, as well as beyond the tourism sector and the responsibility of MoT.

- Green Tax data (MIRA: Maldives Inland Revenue Authority)

→ Although the topic of tax avoidance goes beyond the scope of this project, it may be worthwhile conducting more in-depth assessments into compliance with existing laws and regulations with regard to the Green Tax.

- Visitor survey (MoT)

→ It is recommended to conduct a workshop with representatives of MoT, the consulting company contracted for survey implementation, and other stakeholders, so as to jointly discuss possibilities for improving the methodology .

→ Besides updating the questionnaire, it may be advisable to change the implementation period to a regular monitoring on selected days throughout a full year, rather than conducting two surveys over a two-weeks period. A continuous implementation period does not mean that the number of survey days or the sample size would have to be increased; rather, survey days should be distributed so as to adequately represent relevant seasons, flight arrival patterns, weekdays and weekends, etc.

→ If face-to-face surveys could be implemented rather than self-administered questionnaires, this would lead to (a) reduced margins of error due to misunderstandings and allow for (b) more complex questions, e.g. on expenditures. However, it would require higher costs (or smaller sample sizes at similar costs).

- Regional statistics

→ A workshop is recommended to discuss possibilities of improving local or regional tourism statistics, notably with regard to assess regional economic impacts from tourism with the help of regionalized input-output models.

- **Supply side data: recommendations**
  - Specific studies on the guesthouse market and local tourism development

➔ It is recommended to conduct local assessments on ecological and socio-cultural carrying capacities for tourism, and more generally on the impacts and contributions of tourism in the local community and environment, which would allow for more sustainable local development, better planning of infrastructure needs, and ensure acceptance of tourism on behalf of the local population. MoT may lead this exercise with possible support from development partners.

➔ This could be framed under the Measuring the Sustainability of Tourism project<sup>9</sup>. UNWTO, in collaboration with the UN Statistics Division, is propelling the development of the Measuring the Sustainability of Tourism (MST) program to provide to all countries in the world a common framework to measure the impacts and contributions of tourism on the economy, society and the environment, at both the national and sub-national levels. The Statistical Framework for MST is a valuable guiding tool for countries to produce credible, comparable and integrated data to better guide decisions and policy with respect to sustainable tourism - including the Sustainable Development Goals.

- **Institutional issues**

- Increase institutional capacity in MoT and Maldives Bureau of Statistics (MBS), and strengthen efficiency in regard to statistics

➔ It is required to provide adequate staff numbers for key institutions in charge of statistics and measurements of the tourism industry, the most important economic sector in the Maldives.

➔ Some time-consuming activities could be organized more efficiently. E.g., MoT's tourism section currently compiles regular daily reports, which binds resources, but is of questionable value as long as most data is only available at aggregated monthly levels. Based on a first assessment, data in daily reports often does not change, which means that frequency of publication could be reduced so as to free resources for other tasks.

## ***Component 2. Development of the draft of Country-specific Tourism Recovery Plan***

This Country-specific Tourism Recovery Plan addresses firstly the tourism performance vision and scenarios in the Maldives, and then carried out a review of tourism recovery measures undertaken by the MoT and key stakeholders. Subsequently, this Recovery Plan presents the results of an in-depth assessment of the following priority topics for the tourism recovery plan:

- Current tourism products and activities
- Tourism product clusters and destination management organizations
- ICT readiness
- Marketing activities
- Local employment - HR and the value chain
- Service Quality
- Educational institutions and its networks
- Statistics
- Support mechanisms for tourism SMEs
- Knowledge sharing

<sup>9</sup> See: <https://www.unwto.org/standards/measuring-sustainability-tourism>

- Sustainable structures and processes
- Environment and energy

The Recovery Plan concludes with the following 12 key recommendations for the tourism recovery in the Maldives based on three pillars: Diversification, Quality and Sustainability:

- **Diversification**
  - Develop distinctive tourism products and activities
  - Create product clusters managed by DMOs, which are to be established
  - Improve ICT infrastructure and capacities
  - Expand marketing's structure, messaging and targeting
- **Quality**
  - Enhance local employment & economic development
  - Introduce quality labels and quality measures
  - Upgrade education through international networking
  - Adapt statistics and monitoring procedures
- **Sustainability**
  - Support tourism sector associations and businesses
  - Enable awareness raising and knowledge sharing
  - Introduce sustainable structures and processes
  - Incentivize renewable energy and efficiency measures

The Indicative Summary of Component 2 has been included in Appendix 7.

As background information for the Tourism Recovery Plan, a benchmark analysis was carried out on tourism recovery measures taken in the Dominican Republic, Italy and the Seychelles. The results of the benchmark analysis have been included in Appendix 8.

### ***Component 3. Recommendations to JICA***

This detailed report provides JICA with recommendations on further support which JICA can provide to the Maldives in the tourism recovery process and to the tourism sector in general. It also provides specific recommendation to JICA on selected tourism recovery projects that JICA could support in the Maldives, where possible in collaboration with UNWTO, based on Japan's comparative advantage on providing development assistance in the South Asia region and JICA's priorities for Maldives.

The report presents a total of 16 proposed projects. The project recommendations are based on the strategic actions included in the tourism recovery plan, the inputs and feedback received from project stakeholders. The recommendations are also largely deducted from the reports of Component 1 (Measurement of the current situation of the tourism sector) and Component 2 (Tourism recovery plan). Component 3 is presented as Attachment 1 to this current Project Completion Report.



The proposed projects have been divided into two levels: a) the policy and strategy level and b) the operational level. The proposed projects, presented in a random order, are tabled as follows:

<b>Level:</b>	<b>Project title:</b>
<b>Policy and strategy level</b>	
1	Development of a DMO model and destination development plans
2	Digitalisation and data management of the national tourism authorities
3	Introduction of tourism quality labels: blue flag and green key
4	Measuring of sustainability of tourism
5	Tourism and climate change adaptation and mitigation
6	Tourism crisis communication plan
7	Improving and developing the marketing of the local islands
8	Tourism regulatory environment and SME development
<b>Operational level</b>	
1	Development of culinary tourism products
2	Development of eco- and cultural tourism products
3	Conservation of biodiversity and awareness raising campaign for the protection of the environment
4	Local Island Master Plan
5	Setup of an international tourism hotel training and boarding school
6	Tourism competence promotion boat/mobile training force and capacity building programme for guesthouse businesses
7	Handicraft and souvenir design upgrade
8	Local economy linkages programme

The proposed projects are presented using the following template, which has been prepared in consultation with JICA and that includes relevant information for project planning and implementation:

<b>Project title</b>	Clear and easy understandable project title
<b>Objectives and necessity</b>	<ul style="list-style-type: none"> <li>- Key objective</li> <li>- Specific objectives</li> <li>- Project background/rationale explaining why this project is necessary</li> </ul>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- Project activities</li> </ul>
<b>Locations</b>	<ul style="list-style-type: none"> <li>- If applicable</li> </ul>
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Up to 1 years</li> <li>- Between 1 and 2 years</li> <li>- More than 2 years</li> </ul>
<b>Scheme</b>	<p>Main options of JICA support schemes include:</p> <ul style="list-style-type: none"> <li>- Technical Cooperation Scheme</li> <li>- Grants Aid Scheme</li> </ul> <p>Further JICA has two programmes that could be useful for some of the proposed projects:</p> <ul style="list-style-type: none"> <li>- Dispatching volunteers: they can dispatch either short term volunteers for less than a year (normally 3 – 6 months) or long term volunteers for more than a year (normally two years).</li> </ul>

	- Collaboration with Japanese companies to make investments in the Maldives.
<b>Inputs</b>	- Support side: individual expert (long-term; short-term); any portable equipment, etc. - Maldives side: counterparts, existing equipment, office space, transportation, etc.
<b>Implementation structure</b>	Who will be assigned as the leading stakeholder of the project (Maldivian side) and who are the main partners
<b>Pre-conditions / external conditions and public relations activities</b>	- Any connection to policies, projects, networks, partnerships etc. that are prerequisites for the implementation of the project
<b>Remarks for implementation</b>	Any remarks if it is necessary to transport any physical items (equipment, personnel, etc.) for the implementation of the project
<b>Minimum budget</b>	- Up to USD 200.000: small budget - Up to USD 1.000.000: medium budget - More than USD 1.000.000: big budget A minimum budget is provided for the implementation of the suggested project
<b>Others</b>	- Any other relevant comments

**Additional note:**

The final reports for each of the components are shared with the MoT and JICA. Some project's outputs have been actively used by the MoT for the development of the new Tourism Master Plan. All reports were prepared under the guidance of and reviewed by UNWTO (Marcel Leijzer and Chenxu Wang for all reports; and Clara Van Der Pol and Leandry Moreno for the report of Component 1).

Attachment 1: Recommendations to JICA for tourism recovery projects in the Maldives



## **Attachment to Project Completion Report**

### **Recommendations to JICA for tourism recovery projects in the Maldives**

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November 2022

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## Acronyms

BML	Bank of Maldives
EWT	Employee Withholding Tax
FAO	Food and Agriculture Organization
IFC	International Finance Corporation
IPT	Personal Income Tax
ISA	Income Support Allowance
JICA	Japan International Cooperation Agency
MBS	Maldives Bureau of Statistics
MCAA	Maldives Civil Aviation Authority
MCS	Maldives Customs Services
MED	Ministry of Economic Development
MOF	Ministry of Finance
MIRA	Maldives Inland Revenue Authority
MMA	Maldives Monetary Authority
MMPRC	Maldives Marketing & PR Corporation
MNPI	Ministry of National Planning, Housing and Infrastructure
MOE	Ministry of Environment, Climate Change and Technology
MOT	Ministry of Tourism
NBS	National Bureau of Statistics of the Maldives
NCIT	National Center for Information Technology
SDFC	SME Development Finance Corporation
SME	Small and Medium Enterprises
SRM	Statistics Regulation of the Maldives
TIMS	Tourism Information Management System
TSA	Tourism Satellite Account
TSAM	Tourism Satellite Account of the Maldives
UN	United Nations
UNDESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
WTTC	World Travel & Tourism Council

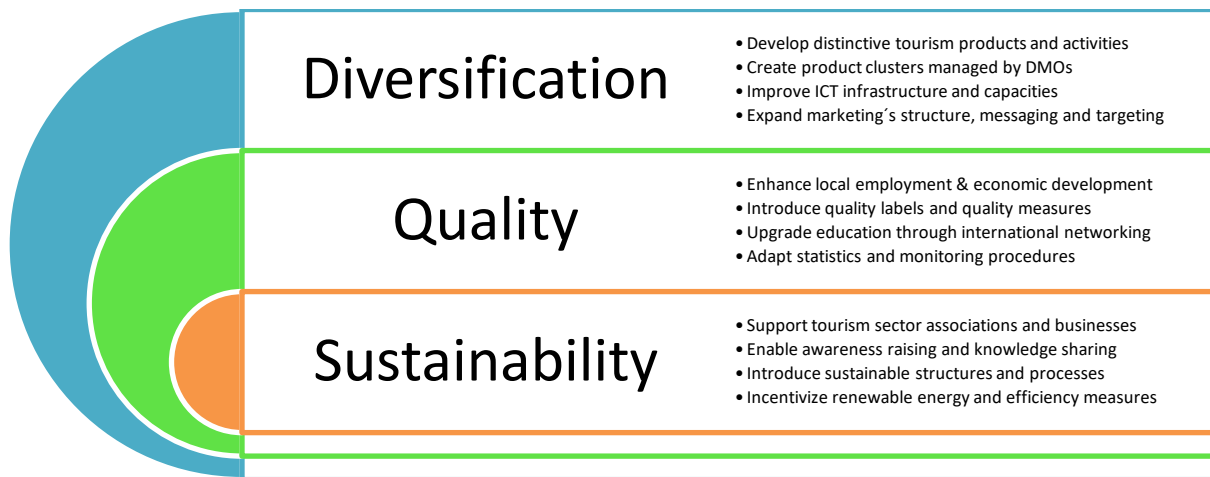
## Introduction

This present report on recommendations to JICA for tourism recovery projects in the Maldives is the third out of three reports within the framework of the project titled “Technical assistance to promote recovery of the tourism activity in the aftermath of the lockdown, regaining consumer confidence and building resilience in the tourism sector in the Republic of Maldives” implemented with the support of Japan International Cooperation Agency (JICA) and the World Tourism Organization (UNWTO).

The objective of this report is to provide recommendations on further support that JICA can provide to the Maldives in the tourism recovery process. The recommendations are based on the strategic actions included in the tourism recovery plan, and the inputs and feedback received from project stakeholders. Moreover, this report aims to assess which of the strategic actions through donor assistance could in particular be relevant and feasible for JICA.

The project recommendations are largely derived from the reports of Component 1 (Measurement of the current situation of the tourism sector) and Component 2 (Tourism recovery plan). The tourism recovery plan for the Maldives is directed towards enhancing resilience and strengthening the tourism competitiveness. Twelve key recovery recommendations have been identified (built around a strategic logic as depicted in the chart below). For each of the three pillars, four key recommendations have been elaborated (see Figure 1 below).

Although the Maldives has achieved excellent recovery figures in terms of tourist arrivals in 2020 and 2021, partly due to a strong competitive advantage based on the COVID-19 travel measures introduced by the government, there are many elements along the tourism value chain which could be implemented to ensure the country remains globally competitive. With countries opening their borders and easing travel restrictions again, particularly in Asia (e.g., Thailand), the Maldives will expect strong competition in the short term. This fact has been taken into consideration for all the recommendations elaborated within the Maldives Tourism Recovery Plan’s logic.



*Figure 1: Pillars for Enhancing resilience and strengthening competitiveness Maldives*

Source: Elaboration by the Consultant

The recommendations in the present report are presented using project data sheet templates, which has been prepared in consultation with JICA and includes relevant information for project planning and implementation. Two types of intervention have been selected: projects that regard interventions (1) on the policy and strategy level and (2) on the operational level.

The projects that represent the policy and strategy level are independent from specific locations as they are designed to be applied to the whole territory of the Maldives. The recommended projects include various thematic areas, such as tourism statistics, tourism institutional framework, regional tourism management models, marketing, introduction of tourism service quality labels, upgrade of technology and digitalization among public tourism authorities, as well as climate change adaptation and mitigation measures.

The proposed projects for the policy and strategy level derive from the pillars illustrated in Figure 1 above and from the recommendations for enhancing resilience and strengthening competitiveness in the Maldives. The proposed development and management of tourism products and destinations must be based on a national legal framework, hence, the identification of a specific management model for regional tourism authorities, responsible for marketing and management, is needed (project 1.1). The newly developed tourism products and an introduction of a management system will create more relevant data. It is for this reason, interventions regarding the digitalization and data management (project 1.2) as well as the monitoring of the tourism system's sustainability (project 1.4) are recommended.



In order to enhance the country's destination quality and visitor experience towards environmentally friendly environments, a specific project for the introduction of quality labels is recommended (project 1.3).

The Maldives is very much affected by climate change. Therefore, it is recommended that the Government introduces certain national policies and incentives, in particular to private businesses to implement mitigation and adaptation measures on their own initiative (project 1.5).

With regards to marketing and communication there are two important policy related actions to be taken. The Maldives has successfully managed the COVID-19 crisis, specifically in terms of communicating governmental policies and steps for the re-opening of borders, airports and hospitality businesses. However, the country and in particular the tourism industry needs to be prepared for other possible crises (related and not limited to health, nature, energy, terror, deadly accident, etc.). Therefore, the preparation of a crisis management communication plan is recommended in project 1.6. Moreover, in order to strengthen the inhabited islands' competitiveness, the elaboration of a distinct tourism marketing plan for "holiday on local islands" is recommended (project 1.7).

The tourism industry in the Maldives is dominated by a few enterprises, mainly joint ventures and international companies. In order to increase the number of locally owned tourism businesses, to reduce bureaucratic hurdles, and to make the tourism industry more attractive for the local population, a project covering the tourism regulatory environment and SME development is recommended (project 1.8).

The operational level project recommendations are directed to the local island tourism SMEs. For most of these recommendations, certain pilot project areas could be selected for implementation. The recommended projects for the operational level address a wide range of thematic areas, including tourism product development, handicraft and souvenir upgrade, environment and biodiversity awareness raising campaigns, a local tourism economy, B2B linking programme and local tourism education facilities.

Taking into consideration pillar 1 / recommendation 1 from the Pillars chart in Figure 1, "develop distinctive tourism products and activities", as well as the proposed project 1.1., it is recommended to implement two projects that foresee the identification, development and piloting of culinary (project 2.1), and eco-, and cultural products (project 2.2.) to diversify the tourist activity landscape. The Maldives' unique biodiversity and natural heritage is currently

facing challenges due to environmental pollution and stress, partly related to the country's tourism industry. In order to increase the protection of the environment it is recommended to implement awareness raising campaigns for local businesses and the population (project 2.3). Product diversification and new business management models need to be strengthened around the Maldives to remain competitive. Hence, the elaboration of local tourism island plans is recommended (project 2.4).

As the tourism industry and arrival numbers in the Maldives are predicted to grow over the next years (due to investment in infrastructure, new resorts and guesthouses, among others) the availability of skilled local workforce is a critical topic. Based on this assumption, two projects related to education and capacity building are recommended (projects 2.5 and 2.6).

To enhance the local economic impact from tourism it is further recommended to extend the tourism value-chain to businesses that benefit indirectly from tourism such as artists, handicraft, agriculture, among others. In order to increase the sales of handicraft products a specific souvenir design upgrade project (project 2.7) is recommended. Project 2.8 addresses the implementation of a local economy linkages programme, which is focused on interconnecting the local businesses with a business match-making platform.

In consultation with JICA, the following project proposal template has been designed to present the projects:

### Component 3 – Project Proposal Template

<b>Project title</b>	Clear and easy understandable project title
<b>Objectives and necessity</b>	<ul style="list-style-type: none"> <li>- Key objective</li> <li>- Specific objectives</li> <li>- Project background/rationale explaining why this project is necessary</li> </ul>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- Project activities</li> </ul>
<b>Locations</b>	<ul style="list-style-type: none"> <li>- If applicable</li> </ul>
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Up to 1 years</li> <li>- Between 1 and 2 years</li> <li>- More than 2 years</li> </ul>
<b>Scheme</b>	<p>Main options of JICA support schemes include:</p> <ul style="list-style-type: none"> <li>- Technical Cooperation Scheme</li> <li>- Grants Aid Scheme</li> </ul> <p>Further JICA has two programmes that could be useful for some of the proposed projects:</p> <ul style="list-style-type: none"> <li>- Dispatching volunteers: JICA can dispatch either short term volunteers for less than a year (normally 3 – 6 months) or long-term volunteers for more than a year (normally two years).</li> <li>- Collaboration with Japanese companies to make investments in the Maldives.</li> </ul>
<b>Inputs</b>	<ul style="list-style-type: none"> <li>- Support side: individual expert (long-term; short-term); any portable equipment, etc.</li> <li>- Maldives side: counterparts, existing equipment, office space, transportation, etc.</li> </ul>
<b>Implementation structure</b>	Who will be assigned as the leading stakeholder of the project (Maldivian side) and who are the main partners
<b>Pre-conditions / external conditions and public relations activities</b>	<ul style="list-style-type: none"> <li>- Any connection to policies, projects, networks, partnerships etc. that are prerequisites for the implementation of the project</li> </ul>
<b>Remarks for implementation</b>	Any remarks if it is necessary to transport any physical items (equipment, personnel, etc.) for the implementation of the project
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 200.000: small budget</li> <li>- Up to USD 1.000.000: medium budget</li> <li>- More than USD 1.000.000: big budget</li> </ul>
<b>Others</b>	<ul style="list-style-type: none"> <li>- Any other relevant comments</li> </ul>

Table 1 JICA Project Proposal Template

## Proposed Projects Titles

The proposed projects have been divided into 1) Policy and Strategy level projects, and 2) Operational level projects, as can be seen in the table below:

Project Title	
<b>1. Policy and strategy level</b>	
1.1	Development of a DMO model and destination development plans
1.2	Digitalization and data management of the national tourism authorities
1.3	Introduction of tourism quality labels: blue flag and green key
1.4	Measuring of sustainability of tourism
1.5	Tourism and climate change adaptation and mitigation
1.6	Tourism crisis communication plan
1.7	Improving and developing the marketing of the local islands
1.8	Tourism regulatory environment and SME development
<b>2. Operational level</b>	
2.1	Development of culinary tourism products
2.2	Development of eco- and cultural tourism products
2.3	Conservation of biodiversity and awareness raising campaign for the protection of the environment
2.4	Local Island Master Plan
2.5	Setup of an international tourism hotel training and boarding school
2.6	Tourism competence promotion boat/mobile training force and capacity building programme for guesthouse businesses
2.7	Handicraft and souvenir design upgrade
2.8	Local economy linkages programme

*Table 2: Project Proposals Titles Summary*

The following chapter 1 and chapter 2 will present all suggested projects above using the project proposal template shown in Table 1.

## 1. Policy and strategy level project proposals

Chapter 1 presents the projects that focus on the policy and strategic level

<b>Project Title</b>	<b>1.1 Development of a DMO model and destination development plans</b>
<b>Objectives and necessity</b>	<p><b>Key objective:</b></p> <p>The objective is to establish a model for a destination management organisation (DMO) to enhance the diversification and distinctiveness of the atolls and island groups.</p> <p><b>Project background and rationale:</b></p> <p>At the moment, tourism at destination level is mainly managed by the regional and local island councils only, without any proper plan for development and marketing, and low budget possibilities. Once the DMO model (based on principles of Public Private Partnership) has been developed for one destination, it can ideally be replicated at various atolls around the country. Specific destination management plan shall be elaborated for the selected DMO destination.</p> <p>The key responsibility of the DMO is to co-ordinate the management of all the elements that make up a destination and its tourism product (attractions, amenities, access, marketing and pricing). This will result in enhanced opportunities for tourists to travel more within the Maldives, creating more economic possibilities for the local islands.</p>
<b>Contents (main activities)</b>	<p>The development of a specific decentralized model for the DMO includes the elaboration of its governance structure, data management, responsibilities, funding models, and an action plan for the priority activities. There needs to be a strong focus on multi-stakeholder engagement and the establishment of an Advisory Committee.</p> <p>Furthermore, for each DMO, a proper Destination Management Plan is developed which sets out the objectives and targets of the tourism industry on the selected atoll for the next 5 years in terms of strategic and spatial planning, environmental protection, marketing, among others.</p>
<b>Locations</b>	<p>Local context: A possible location for this pilot project could be Addu Atoll, where good possibilities exist for product diversification and enhancing the local economic impact from tourism. The Addu City Council is responsible for tourism planning on the atoll but has limited capacities and human resources. A DMO is needed to take over specific tourism related activities such as stakeholder management, regional marketing, business matchmaking, and product development, among others.</p> <p>Ideally, such a DMO is based on a PPP model which is distributing the responsibility, funding, and overall interests on the private and public</p>

	sector likewise. With such a DMO model in place a specific Tourism Destination Management Plan can be elaborated.
<b>Project implementation period</b>	- Within 2 years
<b>Scheme</b>	Technical cooperation
<b>Inputs</b>	The following support would be required to implement the project: <ul style="list-style-type: none"> <li>- international experts on Tourism Destination Management, tourism strategy, marketing quality assurance, data management, and multi stakeholder collaboration</li> <li>- national expert on tourism law, institutional policy, HR</li> <li>- Maldives side: office space, transportation</li> </ul>
<b>Implementation structure</b>	From the Maldivian side, the following entities would be responsible for the successful implementation of the project: <ul style="list-style-type: none"> <li>- For the DMO model development: MOT</li> <li>- For the implementation of the first DMO destination: MOT and regional island council</li> <li>- For the destination management plan: MOT and regional island council</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	The decentralization strategy of the Government is an excellent basis for the introduction of DMOs. However, the definition of a proper policy and regulatory framework for the installation of regional offices based on principles of public-private partnership is a precondition.
<b>Remarks for implementation</b>	The project focus should be on the development of the DMO model; on its implementation in one destination; on the destination plan. The model shall then be applied to various destinations in a second step.
<b>Minimum budget</b>	- Up to USD 1.000.000: medium budget
<b>Others</b>	The project budget shall include the development and management of the DMO for the first two years, with the intention that the organization will be able to cover its own costs afterwards.

<b>Project title</b>	<b>1.2 Digitalisation and data management of the national tourism authorities</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>This project aims at enhancing the digitalization of the tourism sector, including the collection and analysis of big data and the sharing of knowledge on a specific platform (dashboard). The activities focus primarily on the upgrade of digitalization and technology for the Ministry of tourism and possible DMOs with a specific cloud-based system for data storage and collaboration.</p> <p><b>Project background and rationale:</b></p> <p>All licensed tourism businesses are required to submit monthly reports on guest numbers and occupancy rates to the MOT. Reportedly, the level of compliance with this obligation varies substantially between different types of establishments. E.g., while resorts appear to generally have a high level of compliance, it is much lower in the guesthouse sector. Reasons include a lack of understanding of the importance of accurate statistical data among smaller, privately-run businesses, lack of resources, and less structured operative work routines in SMEs. The new Tourism Information Management System (TIMS) is a step toward facilitation of monthly data submission but is not yet fully adopted by the guesthouse sector.</p> <p>Under the proposed project, a mobile application will be developed that can be integrated in TIMS and the broader eFaas, e-government system and will facilitate data submission (e.g., by sending monthly reminders) in line with privacy and data security requirements.</p>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- Elaboration of a strategy for a “big data” data center and analysis, linked to the identification and installation of an interactive knowledge sharing platform (dashboard) with an open data source;</li> <li>- Training and capacity building for MOT and DMO officials who shall be responsible for leading the implementation of the action plan;</li> <li>- Development of a mobile application for the submission of relevant tourist arrival data.</li> </ul>
<b>Locations</b>	N/A
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Within 2 years</li> </ul>
<b>Scheme</b>	Technical cooperation
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- international experts on data management, tourism statistics, programmer and data storage, designer, data strategy</li> </ul>

	<ul style="list-style-type: none"> <li>- national experts on data protection and data privacy act, institutional policy, legislative drafting</li> <li>- Maldives side: office space, transportation</li> </ul>
<b>Implementation structure</b>	<p>From the Maldivian side, the following entities would be responsible for the successful implementation of the project:</p> <ul style="list-style-type: none"> <li>- for the big data strategy and the implementation of the action plan: national bureau of statistics and MOT</li> <li>- For the mobile app and data transfer: national bureau of statistics</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	<p>An open data policy that is introduced and managed by the Government, its Ministries and other public authorities is needed.</p>
<b>Remarks for implementation</b>	<p>The Government, in particular the MOT, must play an active role in boosting technology adoption, in particular with the adoption of advanced digital technologies within the MOT for its own activities, services, workflow, publications and communications. Digital adoption can increase the effectiveness and efficiency of private enterprises not only for improving their daily operations but also for creating unique experiences for tourists.</p>
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 1.000.000: medium budget</li> </ul>
<b>Others</b>	<p>The project budget shall cover the strengthening of digitalization and the development of an interactive knowledge sharing platform (dashboard) for the first two years, with the intention that the national stakeholders will be able to manage the platform and cover its costs afterwards.</p>



<b>Project Title</b>	<b>1.3 Introduction of tourism quality labels: Blue Flag and Green Key</b>
<b>Objectives and necessity</b>	<p><b>Key objective:</b> The key objective is to stimulate ecological awareness of enterprises as well as inhabitants throughout the Maldives and to attract more ecologically aware tourists. The inhabited islands of the Maldives often do not match the expectations of international ecological standards. Hence, the standards need to be improved with the aim to qualify for internationally known quality labels.</p> <p><b>Project background and rationale:</b> BLUE FLAG: A world-renowned award for safe and clean beaches is trusted by millions around the globe, the Blue Flag programme is run by the Foundation for Environmental Education and is headquartered in Copenhagen, Denmark.<sup>10</sup></p> <p>In order to qualify for this prestigious award, a series of stringent environmental, educational, safety-related and access-related criteria must be met and maintained for the beaches and tourism enterprises. The iconic Blue Flag is one of the world’s most recognized voluntary awards for beaches, marinas, and sustainable boating tourism operators. Encouraging especially Island City Councils (and possibly future DMOs) to implement it would be a successful step for enhancing ecological awareness on the inhabited islands plus a strong encouragement for FIT (Fully Independent Tourists) to come for a visit.</p> <p>The GREEN KEY: is a voluntary eco-label awarded to more than 3,200 hotels and other establishments in 65 countries. The Green Key award is the leading standard for excellence in the field of environmental responsibility and sustainable operation within the tourism industry. This prestigious eco-label represents a commitment by businesses that their premises adhere to the strict criteria set by the Foundation for Environmental Education. A Green Key stands for the promise to its guests that by opting to stay with the Green Key establishment, they are helping to make a difference on an environmental level.<sup>11</sup></p> <p>In the focus of the Green Key project stands a grant system, offering financial support to private Island Guest Houses in order to upgrade their businesses to international ecological and environmentally sustainable standards.</p>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- Elaboration of a grants scheme key and selection criteria for accommodation providers on inhabited islands to qualify for the Green Key label</li> </ul>

<sup>10</sup> More information: <https://www.blueflag.global>

<sup>11</sup> More information: <https://www.greenkey.global/>

	<ul style="list-style-type: none"> <li>- Awareness raising program among accommodation providers on inhabited islands to participate in a grants scheme for getting financial support to qualify for the green key label</li> <li>- Elaboration of a grants scheme key and selection criteria for the blue flag local island councils (managing beaches and marinas)</li> <li>- Awareness raising program among local island councils (managing beaches and marinas) to participate in a grants scheme for getting financial support to qualify for the blue flag label</li> </ul>
<b>Locations</b>	Valid for all inhabited Islands of the Maldives which are considered for tourism development.
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- More than 2 years</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Grants aid scheme</li> <li>- Possibility to involve JICA volunteers</li> </ul>
<b>Inputs</b>	<ul style="list-style-type: none"> <li>- The following support would be required to implement the project:</li> <li>- International tourism expert on quality and sustainability</li> <li>- Budget to establish a grants scheme to support tourism enterprises and destinations in the Maldives to meet the requirements of the Blue Flag and Green Key labels</li> <li>- Maldives side: office space, and transportation to be provided by the Quality Assurance and Registrations department of the Ministry of Tourism</li> </ul>
<b>Implementation structure</b>	The Quality Department of the Ministry of Tourism would commission a campaign with representatives of the labels informing the accommodation sector about the Green Key Label and additionally involving the Island City Councils of inhabited island for the topic of the Blue Flag Beaches
<b>Pre-conditions / external conditions and public relations activities</b>	A close cooperation with the activities of the Ministry of Environment is considered as fruitful.
<b>Remarks for implementation</b>	The Quality Department of the Ministry of Tourism would develop and manage grants scheme.
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 1.000.000: medium budget, depending on the number of participants which should be participating in a grants scheme</li> </ul>
<b>Others</b>	For the Green Key Label, it is recommended to exchange information with the Sun Island and Royal Island Resort, which implemented the label in March 2022

<b>Project title</b>	<b>1.4 Measuring the Sustainability of Tourism (MST)</b>
<b>Objectives and necessity</b>	<p><b>Key objective:</b> Establishing a standards-based framework for sustainability in tourism measurement and monitoring in national and subnational statistics will strengthen international comparability and benchmarking, improve communication and awareness for sustainability issues among tourism stakeholders, and provide a basis for better strategic tourism planning and management.</p> <p><b>Project background and rationale:</b> While sustainability is nowadays widely embraced as the leading development paradigm, the exact meaning of the term, and, most notably, its applicability, are still subject to different interpretations, notably from the perspectives of businesses and the wider public. UNWTO's Measurement of Sustainability in Tourism initiative aims at developing an international statistical framework for measuring tourism's role in sustainable development, including economic, environmental and social dimensions.</p> <p><b>At the national level</b>, the proposed project aims at integrating UNWTO's MST framework into the system of tourism statistics and measurement in the Maldives across different institutions. Inter alia, a specific focus may be on integration of links between tourism and the environment into the newly established Tourism Satellite Account (e.g., ecosystem services valuation for the tourism sector, positive and negative externalities of tourism on the environment, environmental goods and services and green jobs associated with the tourism sector).</p> <p>Sustainability monitoring is also required <b>at the local level</b>, at which there is a general lack of statistical data available in the Maldives. Such data, however, is crucial for the strategic planning of regional and local sustainable tourism structures and value chains, notably with regard to strengthening SMEs and the local guesthouse sectors. This sector has experienced substantial growth over the past decade; however, development has largely followed a laissez-faire approach which may lead to unsustainable and inappropriate outcomes in the future.</p> <p>The measures proposed at the local level should be first implemented in one or several pilot destination(s) and can be subdivided as follows: (a) strengthening of local tourism statistics as basis for an economic impact assessment and benchmarking and (b) assess local carrying capacity as basis for sustainable tourism planning and management. (a) Is proposed to follow the internationally established method of input-output modelling, which will ensure comparability and trustworthiness of results. For (b) it is important to adopt a holistic</p>

	<p>perspective, considering ecological as well as socio-economic parameters. The Limits of Acceptable Change framework may provide a conceptual basis for the project, acknowledging that every tourism activity will have some kind of (negative) impact. Defining the degree of negative (e.g., environmental) impact that is deemed acceptable, and the level and distribution of positive (e.g., economic) impact that is desirable and achievable, shall ideally be the outcome of a participatory process, including both experts as well as tourism stakeholders and local communities.</p>
<b>Contents (main activities)</b>	<p><b>National level:</b></p> <ul style="list-style-type: none"> <li>- Gap analysis on sustainability aspects in tourism statistics</li> <li>- Capacity building on MST</li> <li>- Integration of sustainability aspects in national statistics system, e.g. TSA</li> <li>- Strengthening of guidelines for data collection and monitoring, e.g. for tourism businesses</li> <li>- Awareness raising among involved stakeholders for better cooperation with regards to tourism data and measurement</li> </ul> <p><b>Local level:</b></p> <ul style="list-style-type: none"> <li>- Demand-side pilot study on economic impacts of tourism (visitor survey, input-output analysis)<sup>12</sup></li> <li>- Awareness raising among local tourism stakeholders for the importance of tourism statistics, benchmarking and carrying capacity assessments for (sustainable) planning and management</li> <li>- In-depth Environmental and Social Impact Assessment (ESIA) of tourism at the local level, including planned and future infrastructure and products</li> <li>- Participatory assessment of Limits of Acceptable Change (socio-ecological carrying capacity), taking into account economic, socio-cultural and environmental criteria</li> <li>- Participatory process for the planning and development of sustainable tourism planning based on established Limits of Acceptable Change</li> <li>- Dissemination and awareness raising of pilot region outcomes in other destinations in the Maldives, with the aim of facilitating future upscaling of approaches</li> </ul> <p><b>Overall:</b></p> <ul style="list-style-type: none"> <li>- Project management</li> <li>- Dissemination and communication</li> </ul>
<b>Locations</b>	<ul style="list-style-type: none"> <li>- National level</li> <li>- Local pilot region (destination level; it is recommended to select a destination with a sufficient size of the local tourism</li> </ul>

<sup>12</sup> For the proposed methodology see, for instance: Arnegger J. (2014) Protected Areas, the Tourist Bubble and Regional Economic Development. Two Case Studies from Mexico and Morocco. Würzburg: Geographische Gesellschaft Würzburg. URL: <https://doi.org/10.25972/WUP-978-3-95826-001-6> (accessed 15 Oct 2022)

	sector and an established guest house market, which is expected to experience further growth in the future)
<b>Project implementation period</b>	- More than 2 years
<b>Scheme</b>	- Technical cooperation
<b>Inputs</b>	The following support would be required to implement the project: <ul style="list-style-type: none"> <li>- Team Leader, international experts on tourism statistics, regional economics, sustainable tourism development, ESIA, stakeholder dialogue</li> <li>- National experts on tourism statistics, tourism planning, tourism law, local project manager (central level and pilot region level)</li> <li>- Project assistance, accounting</li> <li>- Maldives side: office space (national and pilot destination level), transportation, equipment</li> </ul>
<b>Implementation structure</b>	Key partners: <ul style="list-style-type: none"> <li>- For overall project implementation and institutional stakeholder coordination: MOT</li> <li>- For tourism statistics: MBS</li> <li>- For environmental aspects of statistics: MOE</li> <li>- For pilot region activities: Local Island Council(s)</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	<ul style="list-style-type: none"> <li>- Political will to strengthen sustainable (local) tourism planning based on scientific data</li> <li>- Continued decentralization process</li> <li>- Participation of relevant stakeholders in participatory planning processes at the local level</li> </ul>
<b>Remarks for implementation</b>	<p>Due to the dual structure of the proposed project with measures to be implemented in parallel at the national and the local (pilot destination) level, sound coordination and regular exchange of information between these two main components is crucial.</p> <p>It is proposed to establish project infrastructure (offices, staff) both at the national level (international team leader and experts) and the pilot destination level (local project manager).</p>
<b>Minimum budget</b>	- More than USD 1,000,000 (about USD 1,000,000 would be the absolute minimum)
<b>Others</b>	

<b>Project title</b>	<b>1.5 Tourism climate change adaptation and mitigation measures</b>
<b>Objectives and necessity</b>	<p><b>Key objective:</b> Upon the work that has been done so far by the Government and other international organizations about climate change measures, this project's objective is to make policies for the tourism sector businesses to be able to implement climate change adaptation and mitigation measures.</p> <p><b>Project background and rationale:</b> The Maldives is one of the most low-lying countries in the world, and climate change, notably sea-level rise (SLR), poses an existential threat to every part of the country. At the same time, the Maldives have been a pioneer in climate change adaptation and mitigation initiatives.</p> <p>Tourism represents by far the most significant economic sector (and is largely dependent on environmental resources that are themselves threatened by climate change impact, e.g., pristine beaches, coral reefs, and other nature-based attractions. The tourism sector needs to contribute and be integrated in adaptation and mitigation initiatives.</p>
<b>Contents (main activities)</b>	<p>The project adopts an integrated approach, focusing on</p> <ul style="list-style-type: none"> <li>- policy level (e.g., strengthening of the national regulatory framework based on a legal gap analysis),</li> <li>- tax level (e.g., recommendations for tax reductions for the import and installation of all mechanisms, equipment, services, etc. directed at the mitigation and adaptation to climate change such as renewable energies, water and energy-efficiency, beach and coral restoration, etc.);</li> <li>- capacity building,</li> <li>- awareness raising and</li> <li>- implementation of pilot measures.</li> <li>- Innovative market-based mechanisms may be specifically considered (e.g., a reef insurance scheme based on the one implemented in the Mexican Caribbean).<sup>13</sup></li> </ul>
<b>Locations</b>	N/A
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Within 2 years</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Grants aid scheme to support the implementation of pilot measures</li> <li>- Possibility to involve JICA volunteers</li> <li>- Possibility to collaborate with Japanese companies to make investments in the Maldives</li> </ul>

<sup>13</sup> see <https://www.swissre.com/our-business/public-sector-solutions/thought-leadership/new-type-of-insurance-to-protect-coral-reefs-economies.html>

<b>Inputs</b>	The following support would be required to implement the project: <ul style="list-style-type: none"> <li>- international experts on environmental impact analysis, environmental data analyst, environmental economist,</li> <li>- national experts on environmental law, energy supply, institutional policy, legislative drafting,</li> </ul> Maldives side: office space, transportation
<b>Implementation structure</b>	Key partners: <ul style="list-style-type: none"> <li>- MOT, Ministry of Environment (MOE), Ministry of Finance</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	Continued willingness to make significant investments in climate change adaptation and mitigation.  Support from the Government for tax reductions on climate change adaptation and mitigation investments.
<b>Remarks for implementation</b>	It is proposed to build on previous initiatives such as the GEF-funded <i>Increasing Climate Change Resilience of Maldives through Adaptation in the Tourism Sector</i> project <sup>14</sup> and launch a new large-scale adaptation and mitigation project with a specific focus on the tourism sector.
<b>Minimum budget</b>	- More than USD 1.000.000
<b>Others</b>	The project should be carried out through active citizen participation

<sup>14</sup> see <https://www.qcfprojects-undp.org/projects/ldcf-climate-resilient-tourism-maldives>

<b>Project title</b>	<b>1.6 Tourism Crisis Communication Plan</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>The development of a comprehensive crisis communications plans specifically aimed at providing guidance to deliver key information regarding tourism related incidents and events to the local and international media and travel and tourist trade, including visitors currently in the Maldives or with firm plans or intent to visit.</p> <p><b>Specific objectives</b></p> <ul style="list-style-type: none"> <li>- The project will identify the most suitable chain of command by working closely with the Ministry of Tourism, Office of the President of the Maldives and the MMPRC to ensure that the appropriate levels are involved and featured in local and international communications.</li> <li>- Establish a line of communications between the rescue and recovery services involved in the resolution of the issue and the crisis communications team.</li> <li>- A protocol and set of principles to guide any and all communications relating to tourism related incidents in the Maldives.</li> <li>- Establishing a line of communication from the local islands / atolls and resorts to the crisis communications team to establish and speed up the distribution of the correct and relevant information.</li> <li>- Establish a clear line of communications from Male to the international travel trade and international press and news associations.</li> </ul> <p><b>Project Background and rationale</b></p> <p>The Maldives faces a multitude of possible and potential risks that could negatively affect tourism reputation, arrivals and the economy of the Maldives. From weather and natural events, e.g., tsunamis and pandemics; to man-made disasters, e.g., a fire in a resort or inhabited island, acts of terrorism; and a risk of accidents involving local and international transport on boats, ferries, planes; or water sports activities popular with tourists, e.g., diving.</p> <p>This project would use the learnings from the Maldives response to the COVID pandemic to create, develop and build a robust and resilient plan to communicate and support the entire Maldives tourism industry during future issues.</p> <p>The response to a crisis or incident is often more important than the incident itself, in order to demonstrate immediate control of the situation and thereby restore confidence to locals and to international travelers, either those already in the Maldives or those about to travel to the Maldives. An incorrect response can lead to larger issues than</p>



	<p>the original incident, with a wider and more damaging knock-on effect across the whole tourism industry.</p> <p>Serious incidents can stretch a well-organized and well-managed senior team, let alone an inexperienced and ad hoc collection of organisations and individuals. Having an agreed and executable plan saves vital time and avoids unnecessary and potentially damaging delays in filling an information void when serious incidents do occur.</p> <p>This project is about the process and way of communicating after incidents; it does not need to be concerned with the type of incident per se, although the scope could easily be widened to include a comprehensive Risk Assessment for the Maldives Tourism Industry. Having an agreed process and a senior crisis communications team is important in order to react quickly and decisively with trusted, correct and up to date information, delivered in a trustworthy and competent way.</p> <p>As 'The World's Leading Destination' it is only befitting that the Maldives also has the World's leading crisis communications plan to help tourism recover as quickly as possible from any future event.</p>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- A comprehensive Tourism Crisis Communications Plan written and ready to be implemented for any incident, based on best practice and practical experience.</li> <li>- Optional: Detailed Risk Analysis of potential issues, crises and threats to Maldivian Tourism Industry.</li> <li>- Formation of the Crisis Communications Team (CCT).</li> <li>- Media training for key tourism officials from the public and private sector on crisis communication.</li> <li>- Capacity building exercises including dummy crisis drill/s undertaken by the CCT to test weak points and ensure that the team understand their roles.</li> </ul>
<b>Locations</b>	Male, but possibly with regional crisis centres in all atolls and even inhabited islands with a large number of tourists, e.g. Maafushi.
<b>Project implementation period</b>	-Up to 2 years
<b>Scheme</b>	Technical cooperation
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- Individual international expert (several short-term missions) for crisis communication</li> <li>- Maldives side: Access to key Government and political communications teams, rescue services and even armed forces if necessary.</li> </ul>
<b>Implementation structure</b>	Ministry of Tourism. Maldives Marketing and PR Corporation. (MMPRC)
<b>Pre-conditions / external conditions and</b>	Must work alongside current international communications networks and PR systems employed by Ministry of Tourism and the MMPRC.

<b>public relations activities</b>	
<b>Remarks for implementation</b>	Work in conjunction with an established Risk Assessment of the Maldives tourism industry.
<b>Minimum budget</b>	Up to USD 200.000
<b>Others</b>	Additional budget and capacity would need to be made available by the Government if regional crisis centres are to be established.

<b>Project title</b>	<b>1.7 Improving and developing the marketing of the local islands</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>To ensure that marketing efforts are successful in attracting more visitors to the Maldives through communicating appealing messages for both the resorts and the local islands.</p> <p><b>Specific objectives</b></p> <ul style="list-style-type: none"> <li>- Collate, review and audit all marketing activity undertaken by the MMPRC over the last 2-3 years.</li> <li>- Review marketing messages and identify those most appealing to current and future audiences.</li> <li>- Analyse current and future likely audiences for all sectors of the Maldivian holiday experience and recommend how to segment the messages accordingly so that the right message appears to the most likely audiences.</li> <li>- Review the costs, benefits, opportunities and weaknesses of developing a sub-brand specifically for local island tourism.</li> <li>- Establish benchmark practices in social media.</li> <li>- Develop and create islands.mv with a clear vision, direction and structure to be the 'go-to' information website for the local islands, including accommodation, shops, tour operators, events, activities and how to travel within the Maldives.</li> <li>- Prepare a marketing plan of recommended promotional activities, messaging, media and budget split according to the priorities and tasks of broadening the marketing message.</li> </ul> <p>The above will lead to:</p> <ul style="list-style-type: none"> <li>- An increase in the number of total visitors to the Maldives.</li> <li>- A proportionally larger increase in people staying on local islands.</li> <li>- An increase in travel around the Maldives and multiple islands stays.</li> <li>- A broadening out of the tourism sweet spot from the Male area to more widespread atolls and islands.</li> <li>- An increase in specialty holidays taken, through people taking advantage of the local island offerings e.g. diving, surfing, cuisine, sailing etc.</li> <li>- An increase in demand to open guesthouses, hotels and homestays in atolls away from the central Male region.</li> <li>- Economic growth and increased employment in the local island economies, with many opportunities for all aspects of the tourism trade across every Atoll and island.</li> <li>- An increase in local inter island demand for transport and travel.</li> <li>- An increase in demand for authentic Maldivian culture.</li> </ul>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- A comprehensive brand and marketing review and audit.</li> <li>- A marketing plan that allows for a broader scope of messaging with the ability to attract new audiences to the Maldives as well as continue the important task of attracting people to and filling the main holiday offering – the resorts.</li> </ul>

	<ul style="list-style-type: none"> <li>- A centrally produced islands.mv website that has a fully functioning team of people to keep the site up to date on a regular, daily basis.</li> </ul> <p><b>Project Background and Rationale</b></p> <p>The Maldives holiday offering has expanded to include local island accommodation, experiences and activities. But the marketing of the Maldives, and perception of visitors is still focused on the luxury ‘one island one resort’ styled holidays.</p> <p>The Maldives is currently marketed as a single destination, when it is in fact a diverse series of wide-ranging archipelagos and hundreds of different islands. When tourism started in the Maldives just 50 years ago, there was only one choice of holiday accommodation: the one island, one resort concept. But today, an increasing number of travelers stay in guesthouses, hotels and homestays on inhabited islands. This is a big shift for international visitors who experience true Maldivian culture, food, activities and the local population on their terms and not those of an international resort.</p> <p>The marketing of the Maldives now needs to reflect this change by expanding and broadening the messages to support holidays and accommodation on local islands, whilst retaining the lure and appeal of the unique one island one resort concept.</p> <p>By starting with a thorough analysis of the current marketing plans and messages, recommendations will be put forward as to how to broaden the message possibly including several different strategies e.g.:</p> <ul style="list-style-type: none"> <li>- Market segmentation. Cultural, demographic and even geo splitting of messages to target specific sectors with different messages to attract those more likely to enjoy and appreciate the local island style holiday vs the resort style holiday.</li> <li>- Creating a sub-brand to promote local island tourism as a distinct style of holiday operating under the Maldives umbrella Masterbrand message (The Sunny Side of Life).</li> <li>- Use the islands.mv project which is currently under development, to be the go-to source of local island information, intra-island travel, attractions, events, activities, shops, restaurants and of course guesthouse and hotel bookings.</li> <li>- Capacity building of the marketing teams at MMPRC and Ministry of Tourism to ensure that the strategies can be implemented through proper teams of e.g. social media specialists and of course reaching out to trade to showcase FAM trips for both local island holidays and resorts.</li> </ul>
<b>Locations</b>	N/A

<b>Project implementation period</b>	Up to 1 year
<b>Scheme</b>	- Technical cooperation - Possibility to involve JICA volunteers, in particular for marketing activities targeting the Japanese market
<b>Inputs</b>	The following support would be required to implement the project: A team of Individual experts with specific skills in marketing, tourism, digital communications and websites. Maldives side: Access to MOT and MMPRC, transportation.
<b>Implementation structure</b>	Ministry of Tourism & MMPRC.
<b>Pre-conditions / external conditions and public relations activities</b>	Need to ensure that the current workload of the MMPRC is undisturbed during the process.
<b>Remarks for implementation</b>	Need to determine who is responsible for islands.mv; the Ministry of Tourism or the MMPRC.
<b>Minimum budget</b>	Up to USD 1.000.000
<b>Others</b>	

<b>1.8 Project title</b>	<b>Tourism regulatory environment and SME development</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b> The key objective of the project is to improve business and SME environment in the tourism sector and thus make investment, including by SMEs, more attractive in the Maldives. In this context it is vital to contribute to legalization of business activities and reduction of activities in the tourism sector that are not fully covered by the regulatory framework.</p> <p>The specific objective of the project is to review the relevant tourism related regulation and draft targeted, actionable recommendations aimed at simplifying and streamlining rules applying to the private sector.</p> <p><b>Project Background</b> SME development and small business in tourism, including guest houses etc., on inhabited islands are actively encouraged in the Maldives. Streamlining of the regulatory framework will help facilitate the development of tourism on inhabited islands, among others through SME development, and would include review and reform of areas such as business licensing, issuance of construction permits (e.g., for hotels and guesthouses), certification rules for hotels and tour operators, and taxation of businesses in the tourism sector.</p>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- Assessment of the existing business and SME regulation in the tourism sector</li> <li>- Drafting of recommendations aimed at the improvement of business and SME environment through regulatory streamlining, optimization of rules of conducting business and ensuring that tourism enterprises do operate in line with the existing regulatory framework.</li> <li>- Intensive stakeholder consultations, including with government, but also important with the private sector, including SMEs;</li> <li>- Support in the implementation of the provided recommendations (could be an extension of the project)</li> </ul>
<b>Locations</b>	N/A
<b>Project implementation period</b>	Up to 1 year Alternatively, 2 to 3 years in case the objective of the project includes implementation of the provided recommendations.
<b>Scheme</b>	- technical cooperation
<b>Inputs</b>	The following support would be required to implement the project:

	<ul style="list-style-type: none"> <li>- two international experts, namely a) business environment, private sector and SME expert, and b) regulatory framework expert;</li> <li>- one local expert with knowledge of business environment and SME matters.</li> </ul> <p>Maldives side: counterparts, office space if needed, etc.</p>
<b>Implementation structure</b>	<p>The office of the President or the Prime Minister is advised to be the key counterpart and the leading stakeholder given that several ministries and agencies are likely to be concerned and involved in the project.</p> <p>For this reason, it will be more efficient to coordinate their work and activities from the President's or PM's office in order to ensure that there is sufficient political buy-in and commitment to initiate and implement recommended reforms.</p>
<b>Pre-conditions / external conditions and public relations activities</b>	<p>For this project to work successfully, it is of paramount importance to have a political will at the government level to initiate reforms, introduce legal amendments where necessary and embark on their implementation.</p> <p>Given that the focus of the project may span different ministries or agencies, a proper coordination and cooperation among them is an important precondition for efficient functioning of the project.</p>
<b>Remarks for implementation</b>	<p>For the successful implementation of the project, the Ministry of Tourism would have to facilitate active collaboration with other Ministries that are dealing with the regulatory framework for SMEs.</p>
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>• Up to USD 200.000 in case the objective of the project is to draft recommendations for the improvement of the business and SME environment</li> <li>• Up to USD 1.000.000 in case the project will be extended to provide support to the implementation of the recommendations</li> </ul>
<b>Others</b>	-

## 2. Operational level project proposals

Chapter 2 presents project proposals for the operational level.

<b>Project title</b>	<b>2.1 Development of agrobiodiversity and eco-gastronomy tourism product</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b> The project objective is to elaborate a nation-wide culinary tourism strategy including a 5-year action plan as well as specific Slow Food Travel destinations around selected atolls.</p> <p><b>Project background and rationale</b> The agricultural system, its agrobiodiversity and the traditional fishing techniques in the Maldives are unique in the world and thus represent an interesting niche tourism product.</p> <p>Slow Food Travel is a tourism product that combines responsible tourism and sustainable agriculture culminating in agrobiodiversity and eco-gastronomy tourism activities. A specific Slow Food Travel destination is developed on a certain atoll for visitors interested in culinary tourism and distinctive Maldivian culinary experiences. This project is also linked to the local blue economy.</p>
<b>Contents (main activities)</b>	<p>The project activities aim to link small scale farmers, food markets, restaurants, accommodation structures and the fishery sector with national and international tour operators and travel agents. In such a way the Maldives can position itself as a culinary tourism destination with various activities and experiences related to the local gastronomy.</p> <p>Given that the local cuisine is very much based on fish, this project is linked to the local blue economy.</p> <p>Project activities:</p> <ul style="list-style-type: none"> <li>- creation of specific eco-gastronomy tourism itineraries;</li> <li>- establishment of the Maldives Culinary Center;</li> <li>- specific trainings with chefs and gastronomy tour guides;</li> <li>- elaboration of a proper culinary tourism marketing concept;</li> <li>- supply-chain analysis of certain agricultural products and fish;</li> <li>- creation of agrobiodiversity and eco-gastronomy tourist experiences;</li> <li>- capacity-building about ecological agriculture and tourism opportunities to farmers and fishermen;</li> <li>- Slow Fish marketing campaign;</li> <li>- Production of Slow Food Travel videographic and photo material for marketing activities;</li> <li>- Production of Slow Food Travel destination brochures and marketing content.</li> </ul>



	<p>The supply-chain analysis is important for linking the local small-scale farming and fishing businesses with the tourist resorts and the guesthouse sector. The aim is to increase the amount of locally produced food served at resorts: this improves the livelihood of farmers and contributes to local environmental sustainability.</p> <p>Moreover, with the Slow Food label the tourists gain awareness about the origin of the food they eat which creates further value added.</p> <p>In addition, the Slow Fish campaign raises awareness about the value chain behind fish, because fish is not just simply food but reflects a system of relationships between microorganisms, human activities – fishing, selling, trading, cooking – and environmental factors.</p>
<b>Locations</b>	Pilot locations for the implementation could be the atolls / islands of Addu, Hanimadoo, and other islands with considerable agricultural production
<b>Project implementation period</b>	- Within 1 year
<b>Scheme</b>	Technical cooperation
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- international experts on Gastronomy Tourism, gastronomy marketing, and Slow Food Travel destination management, and on agricultural and tourism value-chains; videographer and photographer;</li> <li>- national experts on agrobiodiversity, chef with knowledge about national cuisine, dishes and ingredients.</li> </ul> <p>Maldives side: office space, transportation</p>
<b>Implementation structure</b>	<p>Maldivian side:</p> <ul style="list-style-type: none"> <li>- MOT, MMPRC, agricultural and fishing associations, regional island councils, Ministry of Fisheries, marine resources and agriculture</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	For the implementation of this project, information and experiences can be exchanged with Food and Agriculture Organization (FAO) as they are also implementing projects about the development of agricultural structures in the Maldives.
<b>Remarks for implementation</b>	<p>The project can build on existing local initiatives. For example, the farmer cooperative in Hulhumeedhoo island on the most southern atoll in the Maldives is producing food for the local population and the tourism businesses. The cooperative is already linking the agricultural production with tours for visitors.</p> <p>With the support of the Slow Food Travel project, the farmer cooperation can be supported with setting up a proper network of tourism stakeholders (supply-chain), trainings for distinctive Slow Food Travel workshops such as degustation and tours (tourism products and activities), capacity building about organic farming (increased knowledge of sustainable farming), organization of a</p>

	vegetable and fruit market in Addu City (powered with renewable energy from photo-voltaic panels which are installed with a project financed by the World Bank), machinery and equipment, e.g., for making fruit juices (storage, preservative methods, cooling, bottling, labelling, etc.), among others.
<b>Minimum budget</b>	- Up to USD 200.000: small budget
<b>Others</b>	Slow Food is an international association with headquarters in Italy and is specialized on the development of Slow Food Travel <sup>15</sup> destinations.

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<sup>15</sup> Source: <https://www.fondazione Slow Food.com/en/what-we-do/slow-food-travel/>

<b>Project title</b>	<b>2.2 Development of eco- and cultural tourism products</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b> The key objective is to create sustainable economic opportunities for local SMEs in the eco- and cultural tourism sector. Moreover, eco-tourism activities are linked to topics such as climate change, environmental protection and the blue economy; cultural tourism activities are linked to social sustainability and the preservation of tangible and intangible cultural heritage.</p> <p><b>Project background and rationale</b> Distinctive activities with regards to eco-tourism and cultural tourism have hardly been developed so far in the Maldives. The core business is focused on resort tourism and these tourists hardly ever leave the resort island.</p>
<b>Contents (main activities)</b>	<p>Development of the eco-tourism product: The many islands offer vast opportunities to explore mangrove woods, bird-watching activities, local fauna, natural island habitats, fishing, diving, snorkelling, etc. The project activities include:</p> <ul style="list-style-type: none"> <li>- a gap analysis of protected areas, parks and reserves with regards to regulatory framework, management structure and finance;</li> <li>- training needs assessment of staff of existing protected areas in tourist destinations;</li> <li>- establishment of strategic partnerships with international organisations and NGOs<sup>16</sup> about eco-tourism;</li> <li>- Capacity building for tour operators and tour guides about eco tourism and relevant locations;</li> <li>- Elaboration of business and site management plans for protected areas in tourist destinations.</li> </ul> <p>Cultural tourism - defined by the UNWTO as tourism centred on cultural attractions and products - is one of the fastest-growing segments of the tourism industry, accounting for an estimated 40% of all tourism worldwide.<sup>17</sup> It intersects with heritage, religious sites, crafts, performing arts, gastronomy, festivals and special events, among others.</p> <p>In the Maldives there are various elements of the culture and creative industries<sup>18</sup> that can be supported for being further commodified by cultural tourism. The cultural tourism product in the Maldives can especially be dedicated to experiences around the intangible cultural heritage of the islands. The project activities include:</p> <ul style="list-style-type: none"> <li>- the conduct of a nation-wide culture and creative economy census focused on tangible and intangible assets such as</li> </ul>

<sup>16</sup> More information: <https://www.bigvolcano.com.au/ercentre/assoc.htm>

<sup>17</sup> Source: <https://en.unesco.org/news/cutting-edge-bringing-cultural-tourism-back-game>, retrieved in March 2022.

<sup>18</sup> More information about the cultural and creative industry is added in annex 6.3.1 of the component 2 report about the tourism recovery plan.

	<p>musicians, dancers, authors, artisans and artists, mosques, cemeteries, among others.</p> <ul style="list-style-type: none"> <li>- This data collection activity is followed by the establishment of an artist-client matchmaking system so that supply (cultural actors) and demand side (tourism industry actors) can find each-other more easily.</li> <li>- Furthermore, the institutional relations of the Ministry of Tourism as well as the Ministry of Arts and Culture with UNESCO shall be fostered;</li> <li>- Museums exhibition management at the National Art Museum;</li> <li>- Capacity building for tour operators and tour guides about cultural tourism and relevant locations;</li> </ul>
<b>Locations</b>	On potential islands for eco-tourism parks, on islands with relevant cultural heritage, such as performances by artists, mosques and museums
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Within 1 year</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Possibility to involve JICA volunteers</li> </ul>
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- international experts on cultural heritage, cultural tourism development, tourism product development strategy, eco-tourism development, environmental conservation, museum exhibition management;</li> <li>- national experts on environmental conservation, cultural heritage</li> </ul> <p>Maldives side: office space, transportation</p>
<b>Implementation structure</b>	<p>Maldivian side:</p> <ul style="list-style-type: none"> <li>- MOT, Ministry of Arts, heritage and culture, regional island councils, Ministry of environment</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	Careful planning is required regarding the development of tourism in protected areas, including the decision if new resorts will be allowed. It must be clear to the tourism industry and the regional island authorities that protected areas must be seen as an opportunity for tourism product diversification which is for the benefit for all.
<b>Remarks for implementation</b>	Local context: the UNESCO Biosphere Reserve in Addu City is an extraordinary example of a Nature Park, providing a good example of a well-managed eco-tourism site in the Maldives. The Park opened in 2018 and has welcomed 32.000 visitors so far, mainly Maldivian school groups. The Park is an important competitive advantage for the whole atoll and can function as the key driver for tourism to the atoll. However, more eco-tourism activities can be developed, and the Park is in need of establishing strategic international partnerships with NGOs, associations and tour operators which focus on eco-tourism.
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 1.000.000: medium budget</li> </ul>
<b>Others</b>	



<b>Project title</b>	<b>2.3 Conservation of biodiversity and awareness raising campaign for the protection of the environment</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>The awareness raising campaigns for the protection of the environment have two main objectives:</p> <ul style="list-style-type: none"> <li>- Capacity building and training of trainers to diving and snorkelling centers as well as boating operators who further conduct awareness raising for the location population, especially the youth;</li> <li>- Awareness raising through the production and distribution of books with stories and fairy tales to local children and an international audience.</li> </ul> <p><b>Project background and rationale</b></p> <p>Tourism in the Maldives is largely dependent on intact environmental resources, and future diversification of the tourism product may further increase nature's importance for specific tourism products (e.g., ecotourism or diving tourism). However, the linkages between the tourism sector and the environment are not fully understood by all stakeholders, including the local population, and conservation measures are partly implemented in a fragmented manner (e.g., by individual resorts on a limited local scale). Opportunities exist for a better cooperation and coordination of biodiversity conservation initiatives and the tourism sector, which are expected to lead to win-win situations (e.g., conserving natural attractions, coordinate tourism offers and USP across different atolls and islands, and provide better funding and capacities for protected areas).</p> <p>The Maldives' unique environment must be better protected not only by the tourism industry but also by its local population. This project is linked to the awareness raising about the impact of climate change, environmental protection and the blue economy.</p>
<b>Contents (main activities)</b>	<p>The proposed project activities about tourism and biodiversity conservation focus on:</p> <ul style="list-style-type: none"> <li>- provide capacity building for stakeholders (notably for diving and snorkelling centers as well as boating operators; the capacity building can be provided in collaboration with protected area management bodies), and</li> <li>- Edit and publish books with stories about the unique natural and ecological heritage of the Maldives and distribute to schools, related educational institutions, book and souvenir stores.</li> </ul> <p>Two specific awareness raising campaigns are proposed for this project as follows:</p> <ol style="list-style-type: none"> <li>1. In order to raise awareness about the protection of the coastal zones, beaches, oceans and the underwater world the local</li> </ol>

	<p>diving centers, and snorkelling and boating operators are important partners. Specific trainings and capacity building actions about environmental protection are envisaged for these stakeholders. This addresses illegal activities that have a negative impact on the biodiversity, such as feeding the wildlife e.g. sharks, whale sharks, and mantas, and eating turtles and their eggs (as it is a common habit on various local islands). Those partners that have received trainings shall then implement awareness raising activities in particular with local school kids, students, teachers and other multipliers such as local island councils. These activities will happen on the spot with snorkelling classes, boat tours and excursions to marine protected areas.</p> <p>2. The Maldivian literature is rich in fairy tales, legends, myths and stories that speak about the environment such as the ocean, underwater world, its species, and beaches. This project activity aims at editing various volumes with tales and stories about the environment of the Maldives. A series of books, in particular directed at the audience of the local youth shall be published in the local language Dhivehi. These books will further be translated into English and other languages and sold as tourist souvenirs to create an economic impact for local authors and editors.</p>
<b>Locations</b>	Around the whole country
<b>Project implementation period</b>	- Within 3 years
<b>Scheme</b>	- Technical cooperation - Possibility to involve JICA volunteers
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- international experts on environmental conservation, campaign planning manager, content editor,</li> <li>- national experts on environmental conservation; environmental capacity building; national literature about stories and fairy tales; book editors and designers;</li> </ul> <p>Maldives side: office space, transportation, management of volunteers</p>
<b>Implementation structure</b>	<p>Maldivian side:</p> <ul style="list-style-type: none"> <li>- MOT, regional island councils, Ministry of environment</li> <li>- Associations of diving centers and boating tourism</li> <li>- Active citizen participation would be required for the implementation of the project</li> </ul>
<b>Pre-conditions / external conditions and</b>	The diving, snorkelling and boating businesses in the Maldives must be considered as the most important partners for the awareness raising campaigns. Their support is prerequisite for its implementation.

<b>public relations activities</b>	
<b>Remarks for implementation</b>	The implementation of activities about general environmental capacity building and the awareness raising campaign with the books can start at the same time.
<b>Minimum budget</b>	- Up to USD 1.000.000: medium budget
<b>Others</b>	The sale of books to international tourists could be linked to fund raising for ongoing awareness raising projects.



<b>Project title</b>	<b>2.4. Local Island Master Plan</b>
<b>Objectives and necessity</b>	<p><b>Project Rationale</b></p> <p>This project will develop a holistic Master Plan on a selected inhabited island to develop a centre of high-quality tourism with a view to maximizing the travelers holiday experience whilst immersing in the local Maldivian culture, to the benefit of the locals and tourists alike.</p> <p><b>Project Background</b></p> <p>The world class image of tourism in the Maldives is based on the experience offered by resorts on uninhabited islands. The planning and development of tourism on inhabited islands comes with challenges of limited infrastructure and sustainability measures, which may affect the tourism experience.</p> <p>The difference in quality is reflected in the cost difference: Rooms in guesthouses and hotels on local islands average \$65 per night while resorts average \$436 per night. Issues on inhabited islands include low quality of guesthouses, hotels and tourist activities; lack of sustainable energy production; large land reclamation projects; protection and maintenance of local beaches, fish stock, quality of surrounding water and reefs; provision of fresh, clean water; treatment of and management of sewerage, refuse collection, recycling and disposal.</p> <p>In addition, there is a lack of local employees in the tourism, hospitality, catering and activity sectors. This Master Plan would enable the islands' hotels to be priced significantly above current guesthouse and hotel rates but still below resorts, by creating truly boutique hotels and bespoke and shared tourism facilities.</p> <p>It will review the requirements of tourism, existing side by side with the local population for a sustainable and prosperous future.</p> <p><b>Key objective</b></p> <ul style="list-style-type: none"> <li>- To create a centre of high-quality tourism that will bridge the gap between current resorts and local islands holiday experience and cost.</li> </ul> <p><b>Specific objectives</b></p> <ul style="list-style-type: none"> <li>- Establish a Technical Master Plan for development of one specific local island.</li> <li>- Implement infrastructure and logistical changes to oversee the development of that island to deliver a seamless and high-quality holiday experience, combined with the culture and appeal of a traditional Maldives inhabited island.</li> <li>- Ensure this Master Plan delivers improved quality and way of life for the local islanders and tourists alike.</li> </ul>

	<ul style="list-style-type: none"> <li>- Ensure quality of tourism accommodation and set a guideline for appropriate development, style, aesthetics and facilities including setting a cap on the number of rooms on the island.</li> <li>- Establish a training centre for local islanders across the island / atoll to learn more about and get experience in the tourism sector including catering, serving and front of house and learning foreign languages.</li> <li>- Identify specific tourism activities and activity centres with suitable and appropriate training for locals.</li> <li>- Deliver sustainable solutions to energy production, supply, waste management and recycling.</li> <li>- Consider a quality aesthetic to island development in keeping with local Maldivian culture and art.</li> <li>- Assess and recommend transport infrastructure to and from Male and other islands within the local atoll for travelers and locals alike.</li> <li>- Set guidelines on how to develop tourism in an ecologically friendly, sustainable and efficient way, involving the local islanders, and preserving the culture and world-leading image of the Maldives for all on and off-island activities including quality of beaches, water, reefs and wildlife around the island.</li> </ul>
<b>Contents (main activities)</b>	<ul style="list-style-type: none"> <li>- An inhabited island Master Plan to show how the local islands can be developed for maximum benefit for locals and tourists alike.</li> <li>- A working pilot project using a selected island.</li> <li>- Implementation of the Master Plan in line with the specific recommendations above and the main investments proposed in the Master Plan</li> </ul>
<b>Locations</b>	Male but with access to be able to determine the most appropriate island for selection of the project.
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Phase 1 Master Plan: Up to 1 year.</li> <li>- Phase 2 Implementation: More than 2 years.</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Grants aid scheme</li> <li>- Possibility to involve JICA volunteers</li> <li>- Possibility to collaborate with Japanese companies to make investments for the implementation of the Master Plan</li> </ul>
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- A team of Individual and organisational experts with specific skills in sustainability, energy production, design and planning, tourism, civil engineering, water treatment, marine and biosphere protection and development, staff training and community-based projects.</li> <li>- Maldives side: Working with the island council, National planning team, energy, sustainability, water, tourism etc. etc.</li> </ul>
<b>Implementation structure</b>	The Ministry of Tourism should take the lead in this initiative in close collaboration with the Ministry of National Planning.
<b>Pre-conditions / external</b>	<ul style="list-style-type: none"> <li>- The Master Plan would need to be working for the local islanders and local island council as well as deliver the needs of</li> </ul>

<b>conditions and public relations activities</b>	international travellers. NB There is an opportunity to target this project at a specific travel segment e.g. nationality, culture, or activity.
<b>Remarks for implementation</b>	Would need to work with the island council, Ministry of Tourism and various Government ministries covering sustainability, ecology, training, inter-island connectivity, and Planning.
<b>Minimum budget</b>	- Phase 1 Master Pan: Up to USD 1.000.000: medium budget - Phase 2 Implementation: More than USD 1.000.000 big budget.
<b>Others</b>	

<b>Project title</b>	<b>2.5 Tourism Hotel Training &amp; Boarding School (Feasibility Study)</b>
<b>Objectives and necessity</b>	<p>Currently, the Maldives face the challenge of finding enough local workforce for the tourism industry. Furthermore, there is a dependence for education taking place in Male. Thus, an educational center in another part of the country will be helpful to achieve the goals for more educated and qualified personnel for the tourism industry.</p> <p>It is the objective to increase decentralization and create an International Tourism Hotel Training &amp; Boarding School. This may further foster educational networking on an academic and vocational level through collaborating with both local and international teaching staff.</p>
<b>Contents (main activities)</b>	<p>A Feasibility Study should be carried out that addresses the following points:</p> <ul style="list-style-type: none"> <li>- Market Analysis including the actual demographics of the envisaged area, the development of the tourism industry and implications for further employment. Research design including in depth interviews and an acceptance – competition analysis</li> <li>- Design of the Academic and Educational Program including Standard Module Courses, academic programs including diploma, master and bachelor opportunities. Trainings Hotel.</li> <li>- Marketing Concept</li> <li>- Operating Costs</li> <li>- Investment Costs including Construction Costs</li> <li>- Break Even Analysis</li> <li>- Business Partner Structure</li> <li>- Project Evaluation</li> <li>- Campus Concept Development</li> <li>- Preliminary Design – Architectural Drawings</li> <li>- Five Year Business Plan including investment evaluation indicators, critical success factors and legal assumptions.</li> </ul>
<b>Locations</b>	The school should be built in a lesser developed part of the Maldives, e.g., in the North as it is understood there is an initiative with Swiss support taking place in the South.
<b>Project implementation period</b>	<ul style="list-style-type: none"> <li>- Phase 1 Feasibility Study: Up to 1 year.</li> <li>- Phase 2 Implementation: More than 2 years.</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Grants aid scheme (for the implementation phase)</li> </ul>
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- The feasibility study would be carried out with an international and interdisciplinary team including an architect, Marketing expert, HR and training Expert, financial expert, tourism curricula expert.</li> </ul>

	<ul style="list-style-type: none"> <li>- The project would be ideally implemented with an international educational institution which can proof successful projects.</li> <li>- Maldives site: a proposed site should be identified where the proposed school can be established</li> </ul>
<b>Implementation structure</b>	Ministry of Tourism – International Educational Institution, Ministry of Education, Ministry of Youth and Employment.
<b>Pre-conditions / external conditions and public relations activities</b>	The involvement of the local population, especially young people is considered as essential and would be asked for the in-depth interviews during the feasibility study.
<b>Remarks for implementation</b>	Depending on the outcome of the feasibility study transport of building equipment and furnishing will be needed.
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 200.000: small budget for the feasibility study</li> <li>- More than USD 1.000.000: big budget for the development of the institution</li> </ul>
<b>Others</b>	

<b>Project title</b>	<b>2.6 Tourism Competence Boat (Feasibility Study)</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b> To provide locally specific training and consultancy support, carry out ecological research, organize events and tourism awareness campaigns.</p> <p><b>Project background and rationale</b> In the Maldives there are tourism related ecological challenges, lack of information and advisory services on tourism development for the Island City councils as well as a lack of participation of the Maldivian Nationals in the tourism workforce. Furthermore, there is a dependence for activities taking place predominantly in Male. Thus, a tourism competence boat would be able to cruise the islands with a regular schedule and stimulate cultural, educational and scientific exchange having a community of national and international experts on board.</p> <p>Such a Tourism Competence Promotion Boat could circle the Maldives Islands with a predetermined schedule to increase tourism awareness activities throughout the Maldives and stimulate Research &amp; Development and the dissemination of results.</p>
<b>Contents (main activities)</b>	<p>A Feasibility Study should be carried out that addresses the following points:</p> <ul style="list-style-type: none"> <li>- Compilation of a Program comprising Academic activities, Scientific Research, Educational Events.</li> <li>- Study of required staff, including international and national experts</li> <li>- Dissemination Concept</li> <li>- Operating Costs</li> <li>- Investment Costs including Vessel building or rehabilitation Costs</li> <li>- International Partner Structure <ul style="list-style-type: none"> <li>o Five Year Research Plan including investment evaluation indicators, critical success factors and legal assumptions.</li> </ul> </li> </ul>
<b>Locations</b>	<ul style="list-style-type: none"> <li>- The whole Territory of the Maldives</li> </ul>
<b>Project implementation period</b>	<p>Phase 1 Feasibility study: Up to 1 year.</p> <ul style="list-style-type: none"> <li>- Phase 2 Implementation: More than 2 years.</li> </ul>
<b>Scheme</b>	<ul style="list-style-type: none"> <li>- Technical cooperation</li> <li>- Grants aid scheme (for the implementation phase)</li> </ul>
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- The feasibility study would be implemented with international experts from the nautical sector, tourism, social sciences and natural sciences (Short term). For the implementation both national and international experts in these fields would be required on a long-term basis.</li> <li>- Maldives side: The vessel could be thought of to be donated by a sponsor or to be obtained via e.g., the Ministry of Defense, e.g., dismissed, unused vessels. Counterparts</li> </ul>

	should be Ministry of Education, Ministry of Environment, Ministry of Tourism, Ministry of Youth, Sports & Community Empowerment
<b>Implementation structure</b>	The Ministry of Education should take the lead in this initiative in close collaboration with the Ministry of Tourism
<b>Pre-conditions / external conditions and public relations activities</b>	<ul style="list-style-type: none"> <li>- Ministry of Youth, Sports &amp; Community Empowerment should play an active role in events planning;</li> <li>- Ministry of Environment should play an active role in research activities</li> </ul>
<b>Remarks for implementation</b>	The project can be either implemented through refurbishing of a used vessel or building of a new vessel
<b>Minimum budget</b>	<ul style="list-style-type: none"> <li>- Up to USD 200.000 for the feasibility study</li> <li>- More than USD 1.000.000 for the implementation</li> </ul>
<b>Others</b>	

<b>Project title</b>	<b>2.7 Handicraft and souvenir design upgrade</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>This project aims at improving socio-economic stability among handicrafts producers and artisans increasing the resilience of local island communities and individuals and integrating young women and men productively into the economy.</p> <p>Another objective is to disseminate this project and its results with the organization of a workshop and symposium about socially and environmentally engaged art (ISEAS)<sup>19</sup> in the Maldives versus the end of implementation.</p> <p><b>Project background and rationale</b></p> <p>The Maldivian handicraft and artisan sector lacks in attractive souvenirs that are locally produced. Most of the products are of low quality, mainly imported and of unattractive design. The distinctive recognizing pattern as well as the typical Maldivian touch is missing in most of the products.</p> <p>As a result, the project is expected to contribute to revitalize the local economy and to provide youths in targeted communities with higher skills, hence improving their livelihoods.</p>
<b>Contents (main activities)</b>	<p>The activities focus on:</p> <ul style="list-style-type: none"> <li>- identifying skilled artisans, their workshops and availability of local materials, e.g., coconut, palm leaves, wood types, and in particular ocean resources such as coral stone and other marine products (shells, bones, etc.) that could be used for souvenirs – respecting national legal aspects and international regulations. This is strongly linked to the use of sustainable ocean resources and the local blue economy;</li> <li>- analysis of the demand market, sales channels and sales partners along the tourism value chain;</li> <li>- proposals for new designs, products, materials and ideas for demanded souvenirs;</li> <li>- dissemination and promotion: organization of a workshop and symposium about socially and environmentally engaged art (ISEAS)<sup>20</sup> in the Maldives in 2023. This event connects local and international artisans and artists with scientists in the natural and environmental disciplines linking it to the topics of climate change, environmental protection and the blue economy.</li> </ul>
<b>Locations</b>	Around the whole country with pilot destinations to be selected

<sup>19</sup> More information: <https://www.researchcatalogue.net/view/696352/696353>

<sup>20</sup> More information: <https://www.researchcatalogue.net/view/696352/696353>



<b>Project implementation period</b>	- Within 1 year
<b>Scheme</b>	- Technical cooperation - Possibility to involve JICA volunteers
<b>Inputs</b>	The following support would be required to implement the project: <ul style="list-style-type: none"> <li>- international experts on cultural and creative economy, product and graphic design,</li> <li>- national experts on cultural and creative economy, product and graphic design,</li> </ul> Maldives side: handicraft workshop space, transportation facility
<b>Implementation structure</b>	Maldivian side: <ul style="list-style-type: none"> <li>- MOT, regional island councils, Ministry of culture, arts and heritage</li> <li>- Business Center Corporation (BCC)</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	The BCC is currently collaborating with more than 120 artisans and distribute their products via the “Authentic Maldives” souvenir shops  The BCC is considered a strategic partner for this project.
<b>Remarks for implementation</b>	There are several initiatives at local level that the project could support. For example, the local island women association of Addu City counts around 50 skilled members who would like to be more active in producing souvenirs as they already did before the pandemic. With the delivery of training seminars on topics as production methods, design, and materials the women association will generate family friendly job opportunities.  The set-up of a specific website with B2C and B2B sales features and a business match-making platform further supports the sales opportunities. This project is implemented with the partnership of the Business Center Corporation and the Authentic Maldives initiative.
<b>Minimum budget</b>	- Up to USD 200.000: small budget
<b>Others</b>	The sale of souvenirs to international tourists could be linked to fund raising for ongoing awareness raising projects.

<b>Project title</b>	<b>2.8 Tourism local economy business linkages programme</b>
<b>Objectives and necessity</b>	<p><b>Key objective</b></p> <p>This project is aimed at establishing business linkages between the tourist resorts and indirect tourism industry suppliers such as local farmers, fishermen and handicraft producers.</p> <p><b>Project background and rationale</b></p> <p>Tourist resorts are the backbone of the tourism industry and the economy of the Maldives but they are poorly connected to the local island SMEs and family businesses. In order to create a more sustainable resort tourism system all these actors need to be linked to each other.</p>
<b>Contents (main activities)</b>	<p>Project activities include the following:</p> <ul style="list-style-type: none"> <li>- demand analysis (what is the actual demand of tourist resorts for products that can be sourced locally: such as agricultural products, fish, handicraft souvenirs, musicians, performers, among others etc.)</li> <li>- in-depth supply chain analysis of tourist resorts, farmers, fishermen, artisans, etc.</li> <li>- planning, programming, design, development, testing and dispatch of a digital business match-making platform to strengthen the economic ties among these sectors.</li> </ul>
<b>Locations</b>	Around the whole country with pilot destinations to be selected
<b>Project implementation period</b>	- Within 1 year
<b>Scheme</b>	- Technical cooperation - Possibility to involve JICA volunteers
<b>Inputs</b>	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> <li>- international experts on tourism value-chain analysis, web programmer and designer for a digital business platform</li> </ul> <p>Maldives side: hosting services for a digital platform</p>
<b>Implementation structure</b>	<p>Maldivian side:</p> <ul style="list-style-type: none"> <li>- MOT, regional island councils, Ministry of Culture, Arts and Heritage, Ministry of Agriculture and Fisheries</li> <li>- Business Center Corporation (BCC)</li> <li>- Ministry of Economy</li> </ul>
<b>Pre-conditions / external conditions and public relations activities</b>	Active collaboration from BCC in the project is required.
<b>Remarks for implementation</b>	The digital platform shall be tested with a considerable number of users before the end of the project implementation.
<b>Minimum budget</b>	- Up to USD 200.000: small budget

**Others**

The BCC is interested in supporting SMEs and is considered as potential local partner and beneficiary. Eventually they can be considered as owner and manager of the platform.

## Conclusions

The present report contains the recommendations for the implementation of 16 projects. Eight projects are designed for implementation on a policy and strategy level, another eight are to be carried out on an operational level.

The global tourism industry is very competitive, constantly changing, and has the power to significantly contribute to economic and social development, directly and indirectly throughout the population of a country. However, the industry is also contributing to global climate change due to its high consumption of energy for transport and electricity for running related businesses.

The tourism industry of the Maldives has been very successful despite the global downturn of the pandemic starting in spring 2020. At the same time, the tourism industry of the Maldives is significantly dependent on its best-selling product: resort tourism. The tourism recovery plan (presented with the report of component 2) is directed at making the Maldives more competitive through strengthening its resilience and sustainability. It is recommended that this shall be carried out as follows: on the one hand, the tourism value-chain of the resort industry shall be extended to the local businesses and people, and better linked with national resources. On the other hand, the development of local island tourism is of high significance for distributing the economic and social benefits of tourism to a larger population of the Maldives.

In order to do so, certain policies and laws need to be adapted and updated, specific initiatives and a conceptual change in designing the tourism industry towards sustainable structures and processes are necessary. At the same time, operational activities such as capacity building, awareness raising, as well as support in linking businesses along the tourism value-chain shall be implemented during the next years.

In the Maldives, the environmental impact of tourism is significant. Global climate change effects are threatening the country's most important tourism assets such as beaches, corals and underwater wildlife. Man-made waste such as residual waste and wastewater are further challenges to keep the environment of the Maldives healthy. The recommendations of the proposed projects under both the policy and strategy level and operational level all tackle these urgent matters.

This report has presented proposals for 16 projects that address the topics described above. Eight projects are designed for implementation on a policy and strategy level, another eight focus on an operational level.

Based on the main areas of work of JICA and UNWTO, as well as the expertise and experience developed by both agencies on supporting countries to enhance the sustainability, competitiveness and resilience of the tourism sector, several projects proposed in this report arguably offer good opportunities to extend the JICA-UNWTO collaboration in the Maldives.

Some recommended proposals could be considered for joint action in the short-term, while some others in the longer term. Furthermore, there are also good opportunities to merge components from several proposals into one larger comprehensive program to help enhance the local economic impact from tourism in the Maldives.

#### Short-term Joint Actions

At policy and strategy level, proposals that seem to have high relevance for joint action in the short term include:

- **The development of a DMO model and destination development plans (project 1.1)**, which could be tested in a priority destination of JICA in the Maldives, e.g. Addu atoll, with a view to establishing a destination management structure that can deliver tangible benefits for the planning and development of sustainable forms of tourism in the destination.
- **Tourism and climate change adaptation and mitigation (project 1.5)** sets well within the high priority that both JICA and UNWTO attach to climate change action as well as the high importance for the Maldives to address this issue. By making for and supporting the tourism sector to implement climate change adaptation and mitigation measures, a leading example can be set on how to address this challenging topic. Good opportunities may exist to establish links with Japanese companies that can help make innovative technological solutions available to address climate change challenges.
- **The development of a tourism crisis communication plan (project 1.6)** would help build structures and capacity in the tourism sector to communicate with media, tourism trade and visitors in case of any future crisis. Both JICA and UNWTO place high importance to the topic of crisis management and both agencies' expertise and experience on the subject can be of benefit to the Maldives.
- **Improving and developing the marketing of the local islands (project 1.7)** would be a key activity for the Maldives to help promote and expand the development of

tourism to inhabited islands, increasing opportunities for local people to make a livelihood from tourism. This will help advance tourism's contribution towards poverty reduction and development, which are important priorities for JICA and UNWTO as well as for the Maldives Government. UNWTO has worked with many countries and destinations on strengthening tourism marketing, sometimes in collaboration with JICA, which provides a strong basis to offer further support to the Maldives on this topic.

At operational level, it could especially be relevant to consider undertaking joint actions for the following projects:

- **Development of eco- and cultural tourism products (project 2.2)** can contribute to the further diversification of the tourism product of the Maldives, in particular on inhabited islands, and in this way, help create new income generating opportunities for local people in the tourism sector, which is very much in line with activities that JICA and UNWTO support through their respective work.
- **Conservation of biodiversity and awareness raising campaign for the protection of the environment (project 2.3)** is important for strengthening environmental sustainability, a thematic area that is of high importance to JICA and UNWTO as well as to the Government of the Maldives. A project in this field can build on the methodology developed and experiences gained by UNWTO to provide training in various destinations in Africa and Asia on “turning tourism employees into champions of biodiversity conservation and environmental protection” and can also benefit from the vast knowledge and experience of JICA on environmental conservation in the Maldives.
- **The development of a Local Island Master Plan (project 2.4)** could be a holistic project to plan and develop a centre of high-quality tourism on a selected inhabited island. It could incorporate several components of the above-mentioned project proposals and serve to test and develop best practices on one island that subsequently could be replicated on other islands with possible further support from JICA and UNWTO.

#### Medium and long-term Joint Actions

There are a number of good possibilities for medium- and long-term joint action for JICA and UNWTO to collaborate on. These include project proposals addressing other thematic areas such as measurement (project 1.2; 1.4), quality control (project 1.3), training and education (project 2.5; 2.6), and tourism SME and value chain development (project 1.8, 2.1; 2.7 and 2.8). When opting for developing and implementing a comprehensive program for a selected

destination/atoll, some of these components may have already been integrated at an early stage.

Further consultations between JICA and UNWTO would help to specify the scope and content for a follow-up project that will help put in practice various valid recommendations and specific proposals generated through the JICA-UNWTO COVID-19 Tourism Recovery Project for the Maldives. The project could be implemented through JICA's technical cooperation scheme with technical assistance provided by UNWTO and possibilities to implement some of the proposed actions through support of JICA volunteers and/or with investments by Japanese companies. The new project would serve to further expand the JICA-UNWTO collaboration as a leading international partnership on Tourism and Sustainable Development, both for the benefit of the Maldives and possibly for other tourist destinations in the world.