



Strategic guidelines for the eco-tourism value chain in the Ratanakiri Province, Cambodia

ILS LEDA

The study is realised by ILSLEDA experts, in the framework of the Project
***“CLESIDRA: Civil Society Links and Empowerment for Socially Inclusive
Development in Ratanakiri, Cambodia”***, co-funded by the European Union.

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Our greetings go, then, to all the components of the Focus Groups.

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*Tourist coming to Ratanakiri can enjoy –
in a relatively restricted area - several unique and
differentiated attractions, such as
natural attractions, mountains and forests, national parks,
waterfalls, natural lakes, rivers and water rapids,
old volcanoes, birdwatching, sporting and recreational activities,
ethnical culture and villages, with their handicrafts,
art exhibition, traditional music, including dances,
songs and musical instruments,
stories and legends, sacred places*

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Chapter 1. INTRODUCTION

This paper has been elaborated in the framework of the project “CLESIDRA: Civil Society Links and Empowerment for Socially Inclusive Development in Ratanakiri, Cambodia”, co-funded by the European Union.

The main CLESIDRA expected outputs are:

Output 1: A platform (PLASED) established for networking, Civil Society Organizations (CSOs), Local Authorities (LAs), Socio-Economic Service Providers (SESP) and other relevant stakeholders of Ratanakiri Province in Cambodia, with the aim of building a free and permanent dialogue for the socio-economic inclusion of women, youth, indigenous, and the most marginalized and vulnerable people, including representative of each category (at least 110 people of which at least 40% women)

Output 2: At least 4 participatory strategies (STRAT) for competitive, inclusive, sustainable and resilient value chain development (possibly rice, cassava, forestry products, eco-tourism), realized through an innovative participatory exercise, as permanent key tool of the Platform delivered, and elaborated through the participation of at least 15 people for each value chain.

Output 3: A Comprehensive Services System (COSS) established for supporting socio-economic development of the province, as a branch of PLASED, including at least 20 CSOs, 10 SESP, and 10 LAs, of which at least 40% women

The paper refers, in particular, to the output 2.

The logic of the Action relies on the belief that the civil society and the CSOs have an important role for contributing to the province and national development, provided (A) their capacities are empowered, and (B) an environment does exist and enables their active citizenship in public and political life. With this aim, the action will sensitize and strengthen CSOs about the advantages to establish a permanent dialogue with local administrations, and other local actors (Output 1); This dialogue will be facilitated through achieving consensus about local competitive, sustainable, and inclusive territorial development, assessing needs and opportunities in favour of the targeted beneficiaries (Output 2), and enabling them to use the strategic framework to access to the correspondent employment and self-employment opportunities.

The project is run through a partnership between FELCOS, ILS LEDA, Build Community Voices (BCV) and Urban Poor Women Development (UPWD).

The paper aims at recommending strategic guidelines and a plan of action for the development of a competitive, inclusive, and sustainable TOURISM value chain in the targeted territories.

The TOURISM is one of the four prioritised value chains for the exercise, the other being cassava, rice, and cashew. The prioritisation was realised in accordance with the following elements:

- Presence in the province
- Competitive advantages
- Resilience
- Prioritisation from public policies

In particular, chapter 2 will provide details about the RESCO methodology for the value chain assessment; chapter 3 will describe the background of the value chain; chapter 4 will analyse the assessment of the competitive advantages, inclusiveness, and sustainability of the value chain in the target areas; and, finally, chapter 5 will outline the Strategic Actions Guidelines and priorities for the value chain development.

The document is still a draft proposal, submitted to the endorsement of the local actors involved in the Value Chain Focus Group, through which the assessment was carried out.

Chapter 2. METHODOLOGY

In general, the RESCO methodology seeks to recommend value chain strategic guidelines and plans, and it can be applied to any sector. With regard to this specific project, the sectors of intervention are agriculture and tourism and the RESCO methodology will assess the main characteristics, potential, and obstacles for each of the four selected value chains, by involving the main territorial actors.

The assessment considers eight main components, i.e.: the competitive advantage, the market positioning, the value chain status, the gender dimension/equality, the sustainability (financial, social, institutional), the green and circular economy, the resilience, and the obstacles (to the value chain development).

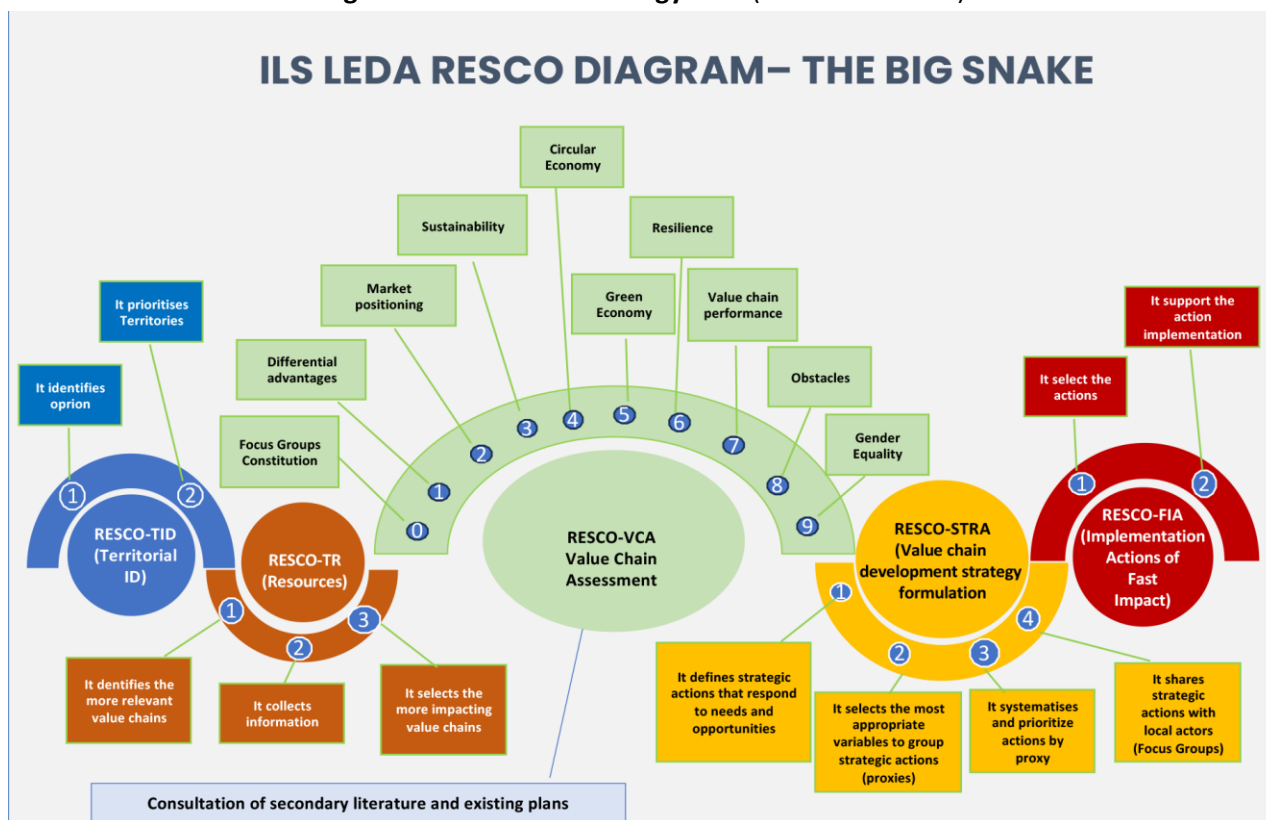
For each component a set of factors are considered, and, for each factor, specific variables are evaluated, according to a special scoring methodology.

The assessment is carried out by following these steps:

- 1) Focus group meetings with 16 people representing local actors of the public and private sector, through a questionnaire;
- 2) Consulting secondary literature;
- 3) Meeting with experts.

The picture below illustrates the RESCO methodology logical and chronological flow.

Figure 1. RESCO methodology flow (Source. ILS LEDA)



Chapter 3. BACKGROUND

According to the Ministry of Foreign Affairs and International Cooperation, Kingdom of Cambodia, the tourism sector is among the **Encouraged Investment Activities** by the Economic Diplomacy Coordinating Group, in particular: “Ratanakiri is renowned for its unique natural beauty and wealth of natural resources. The undulating hills and mountains, plateaus, watershed lowlands, clear crater lakes, rivers and beautiful waterfalls form an impressive itinerary of intriguing destinations for eco-tourism” (Economic Diplomacy Coordinating Group, 2021).

Furthermore, according to Ngin (2016), tourism is playing an important role in rebuilding Cambodia's economy. Tourism is the second largest economic sector in the country and generated more than \$2 billion US dollars in 2011, representing about 15% of the country's gross domestic product (GDP) (MoT, 2011). While tourism provides positive economic benefits, it has negative impacts to the environment and local culture. The environmental impacts of tourism have to be carefully managed, without which the current positive economic benefits in the long run would be outweighed by the negative economic outcomes as a result of environmental degradation, cultural deprivation and its consequences for social cohesion. Indigenous ecotourism, which is defined as ‘nature-based attractions or tours owned by Indigenous people (Zeppel, 2006), is a new concept in Cambodia, despite the fact that there are indigenous communities throughout the country, especially in the Northeastern provinces. Indigenous tourism (ID) appears to be a viable alternative, as a biodiversity conservation and self-determination strategy.

By its definition, indigenous ecotourism is a product or service that is owned or operated by native people. It is an essential element of self-determination through the provision of economic stability and the reinstatement of traditional cultural practices.

Because of the competition from other provinces, the growth of eco-tourism in Ratanakiri has not been satisfactory. For this reason, there is a high level of interest in developing the indigenous tourism in this particular province. However, compared to other countries such as Laos, Vietnam, Myanmar and Thailand where indigenous tourism is well developed, Ratanakiri is relatively late in understanding its importance or pursuing its development. It is also true that many foreign tourists are not aware of indigenous tourism in Cambodia. Therefore, to increase the number of foreign and local tourists there needs to be a promotion strategy for indigenous tourism.

Good governance is a key requirement for sustainable indigenous eco-tourism. It enhances democratic processes, policies, group norms or rules that ensure the legal rights of the Indigenous people to manage and control over own natural and cultural resources. It is important that the Indigenous communities have ‘legal control over land and full legal rights to protect any businesses that they establish’ for any ecotourism to be used for sustainable development of tribal areas”.

Chapter 4. THE VALUE CHAIN PERFORMANCE

The value chain performance, its opportunities and needs were assessed according to the following components:

- 1) Competitive advantage, and causes.
- 2) Marketing positioning

- 3) Value chain performance
- 4) Sustainability
- 5) Environment sustainability
- 6) Circular economy
- 7) Resilient economy
- 8) Gender gaps
- 9) Obstacles

4.1. Competitive advantage

As defined by UN Tourism, a Tourism strategy includes "a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels".

The competitive factors, according to international standards are:

- Authenticity that reflects the unique attributes of the destination, and complemented in terms of Events, Facilities, Leisure activity, Entertainment, Craftsmanship,
- Support of the host community
- Respect the natural and cultural environments.
- Scaling: sufficient scale to make a significant economic contribution, but not very large to create high local economic development dependence from tourism, and reduction of the resident welfare
- Services: fair accommodations, information, guiding, transportation, health care,
- Accessibility: destinations easily reachable from the places of origin of tourists and towards attractive destinations

The UN Tourism Data Dashboard – provides main statistics and insights on key indicators, such as tourist arrivals, tourism share of exports and contribution to GDP, source markets, seasonality and accommodation (data on number of rooms, guest and nights), and particularly the destination-specific factors, such as:

- Attractions
- Events
- Facilities
- Accommodation
- Food and Drinks
- Transit through the country
- Public transport
- Leisure activity
- Entertainment

The RESCO focus group (May 2024) stated that the most valuable competitive advantages of the tourism value chain in Ratanakiri (in English “land of gems”) Province (Cambodia) are its: Natural attractions, Cultural heritage, and Geographical position.

⇒ **Natural attractions:**

1. Good weather
2. Mountains and forests, which make temperatures more pleasant, lowering them by about 3 degrees compared to the capital, thus attracting more tourists. Moreover, the area is covered by the emerald forest which offers trees and fruits typical of the area, such as somron fruit and wild rambutans
3. Virachey National Park, Phnom Prik National Park (Lumphat Wildlife Sanctuary)
4. Waterfalls: Kanchan waterfall; Cha Ong waterfall; Katieng waterfall; Ou Sinclair waterfall. The waterfalls are very different from each other: they have a different height of fall, different width and shape of the wall, creating small pools and rivers where people can swim, surrounded by large trees and aromatic flowers.
5. Natural lakes. Lum Kot Lake and Yeak Loam Lake. Both lakes are of volcanic origin, characterized by large diameters, perfectly circular, an intense blue colour, which makes them natural pools, surrounded by forests and volcanic rocks.
6. Rivers and natural water rapids (Tat Tay): The rivers (one of the most important is the Se San River), are surrounded by forests, the waters flow slowly and create sand islands. The low and sandy banks make access, swimming and other tourist activities easy even for children and adults. The boats offer trips to visit the sandy islands and local villages.
7. Old volcanoes (now inactive)
8. Natural minerals and related business or the visit to the mines of precious stones (especially zircons) and take part in the process of obtaining gems, which give the Ratanakiri region its name: land of gems, precisely.
9. Important place for birdwatching, specially of endangered bird species, including the giant ibis and the Asian marabou, and many other animals such as elephant, tiger, gaur, monkey and other wildlife; river snails
10. Opportunity for several sporting and recreational activities: hiking and trekking, climbing and cycling; fishing, swimming and other water sport.

Figure 2. Maps of Cambodia: the Ratanakiri Province



Other attractions

11. Gastronomy: the region is characterized by various typical dishes, another important aspect for culinary tourism: Yanay indigenous soup; Praung cooked in bamboo; Pragrive with fresh onions; Fresh uncooked buffalo and cow stomach.
12. Arts&crafts: Around these attractions the visitors can find local market for drinks and food, souvenirs and handicrafts, all produced by indigenous group and regional minorities, representative of the cultural specificities of the province.
13. Temporary exhibitions, Exhibition of local artists/culture, Exhibition of international artist/culture of national fame

In some hotels there are small exhibition stands and in the main tourist locations in the areas they are used as product sales spaces. Very sporadically the culture department organizes a stand for the sale of souvenirs.

14. Museum Facilities

The culture department of Ratanakiri province is responsible for managing the “Ratanakiri Museum Centre”, mainly equipped with musical instruments and indigenous crafts. The public facility, located in Banlun, is not open to the public and there is no news on a possible recent opening.

There is no specific museum and/or research center on the indigenous cultures of Ratanakiri.

Ratanakiri is a small exhibition space, managed by the local Tampuan indigenous community, near the shore of the Yeak Laom lake.

It is a traditional wooden house built to preserve and display some traditional hill tribe textiles and tools such as musical instruments, farming tools, fishing gear and clothes

⇒ **Cultural heritage**

1. Ethnic tribe minorities: In addition to being a region rich in natural beauty, Ratanakiri is home to several ethnic hill tribe minority groups, including Brao, Jorai, Kachac, Kraol, Kraveth, Kreung, Kuy, Lun, Phnong, Stieng and Tampuan groups, with specific identity, language and cosmos-vision.

Tourists can visit local communities and experience firsthand the everyday life, traditions, customs and rituals of the indigenous people.

There are approximately 240 indigenous villages in Ratanakiri Province, usually made up of a few hundred people and governed by a council of local elders and a village chief, each with their typical characteristics, uses and customs.

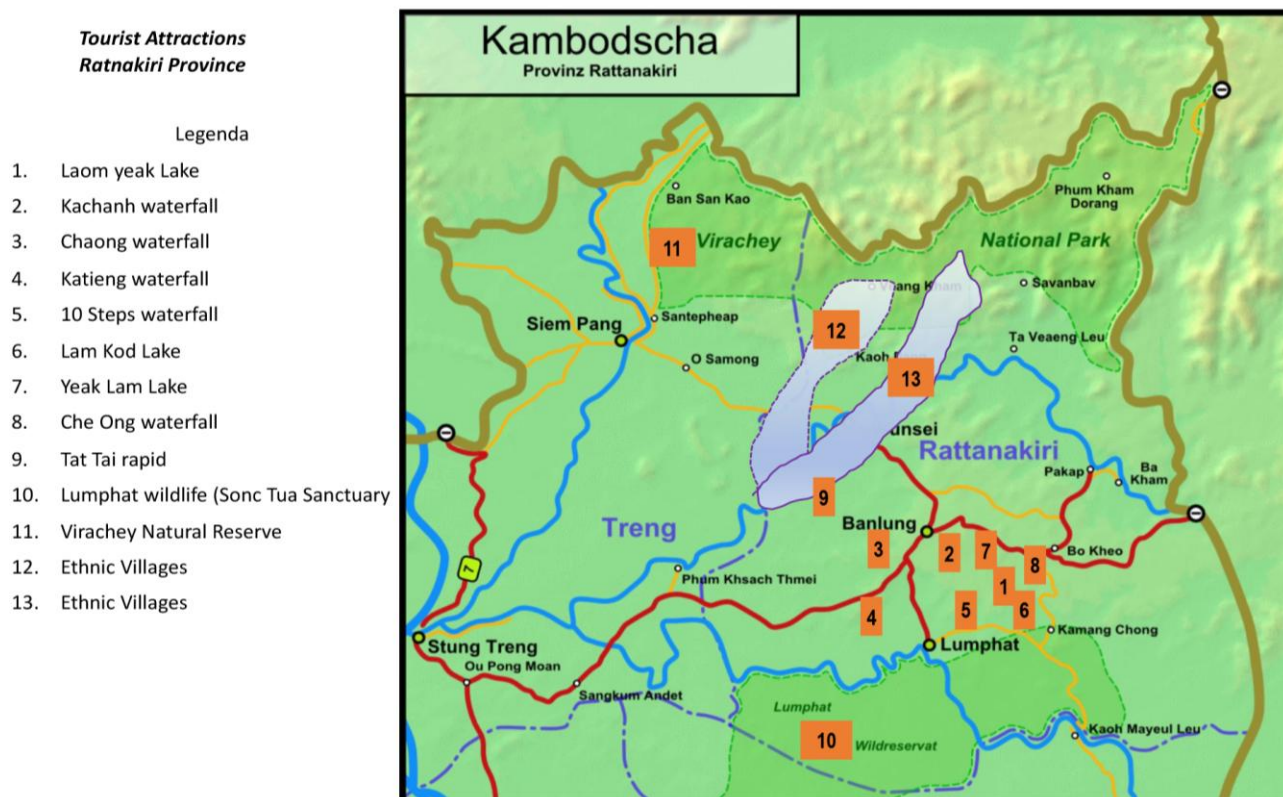
2. Indigenous and cultural diversity related to Typical food and drinks, Traditional music, including dances, songs and musical instruments, Indigenous architecture for homes, Native clothing and craftsmanship, and Typical customs in the tradition of weddings and funerals
3. Stories and legends: The presence of indigenous groups enriches the places with stories and legends linked to the cosmovision of the various ethnic minorities. We thus find sacred places such as Essey Patakmak, over the hill plateau; Veal Ram Plang, a traditional territory of the legendary hill tribe communities; the waters inhabited by the spirits that they worship and pray for the protection of themselves and their ancestral territory.

⇒ **Geographical position**

1. An area with three borders: Cambodia, Laos, Vietnam which allows you to be in Vietnam in less than an hour and in Laos in 2 hours (the Trail Dragon Road is under construction to join the 3 borders). The geographical location allows you to visit multiple attractions close to each other and well connected. There is also an airport, not far from the city, whose scheduled flights are currently suspended, and which only operates for small charter flights.
2. A hub for other Cambodian provinces: such as Mondulkiri and Siem Reap, easily accessible from the main roads.

The next figure geo-localises the aforementioned attractions

Figure 3. Tourist attractions in the Ratanakiri province, Cambodia (Source. ILS LEDA)

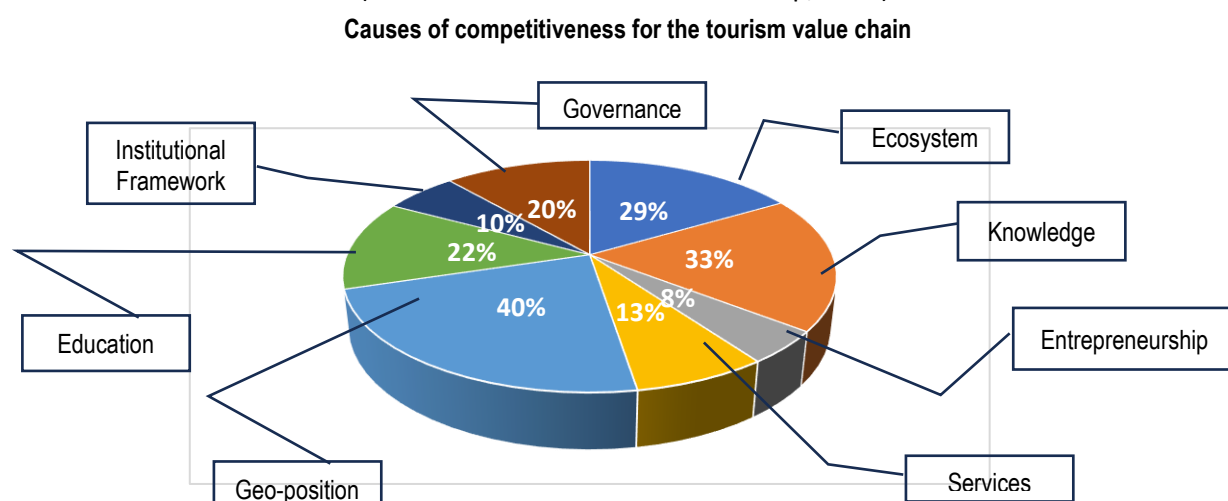


The RESCO focus group assessed those factors impacting with the aforementioned competitive advantages, and the result gave the 3 main causes:

- 1) **Geographical position** mainly thanks to the three aforementioned borders, and proximity to
- 2) **The knowledge of population, specially related specific identity**, mainly thanks to the presence of to several ethnic hill tribe minority groups, with specific identity, language and cosmos-vision
- 3) The **Ecosystem**, including microclimates, plants, soil, water, corresponding to the specific natural system made up of living organisms and the physical environment where they interact in an interdependent manner

The result of this assessment is shown in the following figure

Figure 4. Causes of competitiveness for the eco-tourism value chain in the Ratanakiri province, Cambodia (Source. ILS LEDA RESCO Focus Group, 2024)



According to the international standards, the competitive factors model is the following one in the case of the Ratanakiri province:

Table 1. Competitive factors in Ratanakiri according to international standards (Source. ILS LEDA)

Competitive factors	Ratanakiri state of art
Authenticity	Yes, to be valorised (marketing), and supported or complemented, in terms of Events, Facilities, Leisure activity, Entertainment, Craftsmanship,
Support of the host community	Weak, to be built
Respect the natural environments	Yes, but needs strengthening, mainly in terms of ownership
Respect the cultural environments	Yes
Scaling	No, to be built
Services	Weak, to be improved
Accessibility	Yes from neighbouring countries, to be improved from other foreign countries (airport), to be improved for provincial tours

4.2 Market position

In order to assess the current market, the RESCO focus group analysed:

- The current tourist flows
- The expected goals for tourist flows

The fig 5 and 6 show the results.

Figure 5. Positioning on current markets of the Eco-tourism value chain in the Ratanakiri Province
(Source. ILS LEDA RESCO Focus Group, 2024)

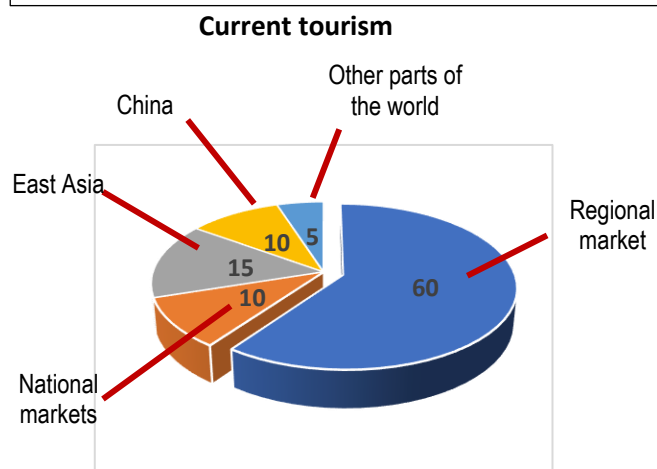
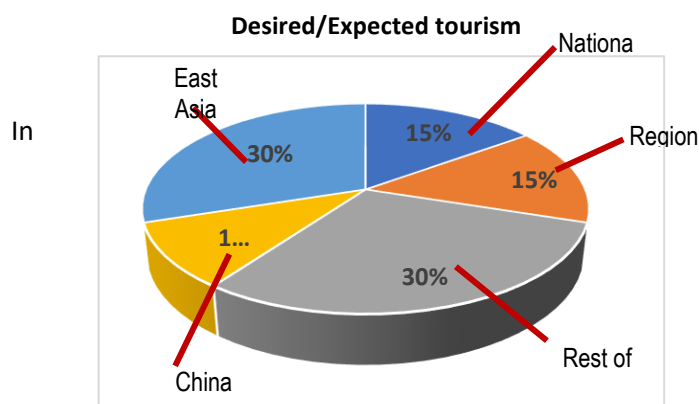


Figure 6. Positioning on desired markets of the Eco-tourism value chain in the Ratanakiri Province
(Source. ILS LEDA RESCO Focus Group, 2024)



conclusion, the effort for sharing the national and international markets should rely on:

- Reduction of the regional tourists (from 60% to 15%)
- Increase of national markets (from 10 to 15%)
- Increase of the other parts of the world (from 5% to 30%)
- Increase of East Asian tourists (from 15% to 30%)
- Stabilization of the Chinese tourist on 10%

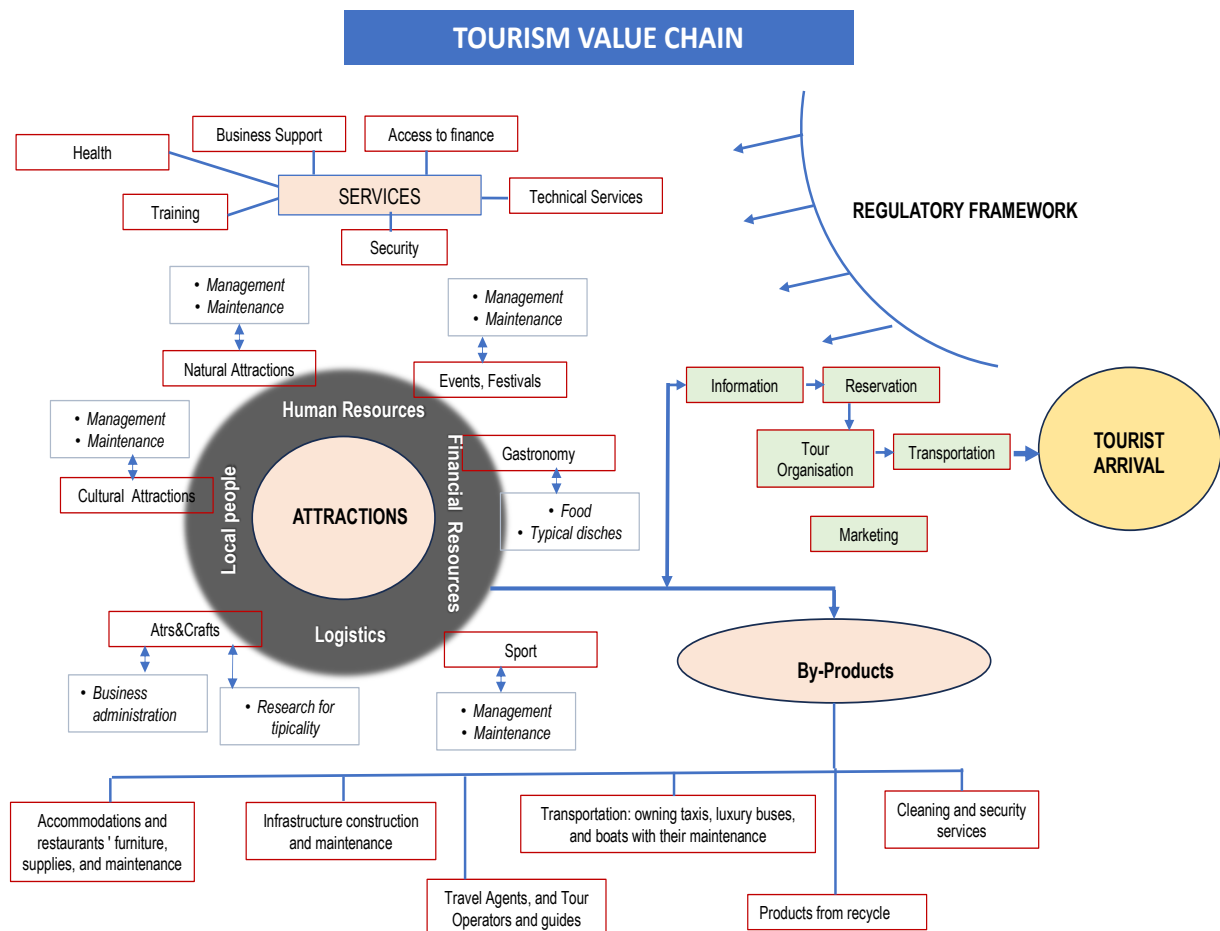
4.3 Tourism Value chain performance assessment

The RESCO focus group assessed needs for the main components of the tourism value chain, and they are

- 1) Human resources
- 2) Financial resources
- 3) Information
- 4) Equipment
- 5) Services
- 6) By-products

Fig. 7 shows the main components of the tourism value chain.

Figure 7. The Eco-tourism Value components (Source. ILS LEDA)



The main results about the value chain performance regarding high level and medium level needs are the following ones:

Human resources

High level

- Highly qualified staff, Staff with ICT skills, and Managers

For all the figures, the Focus group considers there is not a familiarity with the ICT and those, who possess these skills or acquire them, immediately look for work elsewhere, since the local market, still small, cannot guarantee adequate salaries.

Tourism in the province is growing but work within the sector is always considered one of the last options among job choices (until about fifteen years ago, work in hotels was not well regarded by people). Nowadays, there are some tourist movements only on national holidays.

The local university offers only one tourism course, but there are no students enrolled and those who really want to dedicate themselves to the sector move to the capital. There are no schools with specializations in the hotel, restaurant and hospitality sectors.

The training offered by the government is often very long and focuses mainly on hygiene and food safety. It would be necessary to broaden horizons and explore the different facets of the tourism sector.

The training needs expressed revolve around the following training categories:

- 1) Room and food and service; sommelier; cleaning service (a service other than domestic cleaning).
- 2) Hygiene and health (waste collection and disposal)
- 3) Networking and exchange of experiences
- 4) Marketing and customer focus
- 5) Organization of tourist packages and tourist guide services
- 6) Leadership

Medium level

- Low-skilled staff

The same consideration for the high-level needs

- Premises: Land plots for construction or expansion of the hotel complex, Existing premises, Renovation work in an existing building

Banlung town has adequate accommodation for visitors, including 14 hotels with 631 rooms and 37 guesthouses with 535 rooms. In the Province of Ratanakiri there are many accommodation facilities, in particular guesthouses and medium-high category hotels available in sufficient numbers. This has been possible thanks to the incentives offered by the government in the last 2 years, for tourism, maintenance and construction, which have been exploited by the people to renovate and improve the hotel categories. Unfortunately, however, there has not been an equal increase in the market which seems to have not yet recovered from Covid 19.

Currently there are only 2 in Ratanakiri: CITY TOP and SMILE TOUR

Financial Resources

Medium level

- Own Resources from the banks, and government programs

The government, several years ago, provided low-interest financing in the tourism sector. To date, however, the focus group considers there are no specific credit lines for the sector (only capacity

building) and to acquire credit people resort to the canonical financing routes with banks or macro-financial companies. Unfortunately, the volume of visits is small, tourism is mainly concentrated on national holidays. People, therefore, not being able to count on the income generated by tourist activity, went into debt again to repay the credit.

Information

High level

- Market demand information

The focus group considers it is difficult to have clear and defined information on markets and trade. In the agricultural sector, information is partial, as the government encourages the cultivation of some plantations, but nothing about tourism demand from national or international possible clients

- Information about the territorial attractions

There is only one information point in Ratanakiri province, which is currently under renovation. There is an information service within the Ratanakiri National park, which also offers tours only for that specific area. For the rest, it is difficult for tourists to find information on the main tourist attractions and for our operators.

There is a single brochure from the Ministry of Tourism which contains the main attractions of the Province, in Khmer and English. Among the proposals that emerged for ecotourism communities, which do not have information brochures: carry out a mapping of the various attractions at a local level, propose tourist itineraries and draw up brochures in different languages; to create an app for tourism information services at a regional level.

Furniture

Medium level

- Office, reception, rooms, restaurant, common areas), and Office tools

Given the moderate level of growth in tourism, related activities do not use a high degree of technology, which is considered an excessive investment, especially because of the low revenues of the sector

Services

- Networking services (HL), Support for starting a new business (HL), Technical, administrative, organizational services (HL), Access to finance (HL), Marketing (ML), Training (ML); Cleaning, washing (ML)

The focus group considers there are no private service providers and consultant companies specialized in this type of services in the province of Ratanakiri, but only to the capital. These are centralized government-level services with long and difficult bureaucracy.

Furthermore, there is no consistent demand for these services, as there is not a large flow of tourists, it is not considered convenient to invest in this improvement.

Even for training you have to follow these centralized schemes, they offer you a standard and specific package, often very long and you can't learn what you want and when you want and.

Among the most requested services: declaration of tax which is expensive and difficult to understand, how to write a business plan, orienting a business plan idea, administration and accounting.

- Tour operators
To date, there are 25 tour operators in total in Cambodia, before Covid there were 200 companies

By Products

High level needs

- Accommodations and restaurants ' furniture and supplies
- Accommodation maintenance
- Infrastructure construction and maintenance
- Transportation: owning taxis, luxury buses, and boats.
- Transport maintenance
- Travel Agents, and Tour Operators and guides
- Products from recycling: organic for agriculture fertilisers; many products from plastic (including craftsmanship), Craftsmanship from wasted wood (supplies, craftsmanship), and metals

Medium level

- Health care (medical care)
Only a simple private health consultancy studies exist
- Body care
Beauty shops but anything else
- Transport / transfer
3 bus companies in Ratanakiri. The airport has been closed for conventional scheduled flights for several years (it is only available for private charter flights), it is located very close to the city, so it is easily reachable with a tuk tuk ride. The transfer is usually guaranteed by the hotels that pick up the tourists.
- Markets
There is no general craft market in Ratanakiri, nor specific craft shops.
There is a daily market, but the night market has been closed, given the low number of tourists. There are no museums currently open

4.4 Sustainability

The Tourism focus groups assessed 4 types of sustainability

1. The economic sustainability
2. The social sustainability
3. The institutional sustainability
4. The financial sustainability

Large space will be given to environmental sustainability and resilient economy in the next chapters.

The following tables show the results of this assessment

Table 2. The sustainability of the Eco-tourism value chain in the Ratanakiri Province

(Source. ILS LEDA RESCO Focus Group, 2024)

Economic sustainability			
Variables	Values		
	Low	Medium	High

Number of tourists last year (1)			
Number of overnight stays per tourist over the past year (2)			

- (1) For Ratanakiri 293,809 (ESTIMATE by the culture department) of which foreigners 7,815 Some, although in smaller numbers, do not yet have a well-established system of registering visits for the communities. Local tourists spend an average of 30-50 dollars per day. Foreigners 50-70 dollars
- (2) Locals stay for 1 night, foreigners stay at least 2 nights, the rest just cross over. On average people stay a couple of nights

Social sustainability			
Employment (formal + unofficial)			
Ability to create jobs for individuals with different physical and mental abilities			
Ability to create jobs for people with low skill and training level			
Companies run by youth (persons under 35) / total number of companies			
Socially responsible enterprises that invest in the development of the social sphere			

Institutional sustainability			
Committment of Government at support to the tourism development			
Execution of government plans for tourism in the territory			
Coordination between the tourism local actors			

Financial sustainability			
Potential to secure loans for the business sector			
Availability of financing specific mechanisms for the value chain (credit lines, etc.)			
Availability of incentives for innovations			
Availability of incentives to tourism operators			

In conclusion sustainability is a severe gap for the province economy, and strategies shall be addressed for responding to its need, the main one being

Economic sustainability:

- Increase the number of tourists and their overnight staying

Social sustainability

- Increase employment
- Create jobs for individuals with different physical and mental abilities
- Create jobs for people with low skill and training level
- Enhance socially responsible in enterprises

Institutional sustainability

- Push Government to better support the tourism development in remote regions, and to better execute its plans and already existing measures
- Facilitate the institutional coordination between the tourism local actors

Financial sustainability

- Provide financing specific mechanisms for the value chain
- Provide incentives for innovations
- Provide incentive to tourism operators

4.5 Green economy

The focus group assessed the green economy associated to tourism, according to the following components

- Public Regulations
- Contamination
- Risks
- People and organization commitment
- Best practices
- Access to environmental resources

The following table shows the results of the assessment.

Table 3. Green economy aspects related to the Eco-tourism value chain in the Ratanakiri Province
(Source. ILS LEDA RESCO Focus Group, 2024)

Public regulations					
Variable	Indicators for variable		Indicator for the variable effectiveness		
	NO	Yes	Low	Medium	High
Are environmental sustainability, the reduction of pollution, the limitation of gas emissions, and the polluting use of energy sources included in public policies and regulations?					
Are there State regulation for the protection of natural resources?					
Are there natural reserves and protected areas?					
Is the government implementing policies that favour the transition to a clean environment? Are they effective?					
Is the government working to achieve the United Nations Sustainable Development Goals?					
Is there an incentive system to stimulate the green economy and penalize the non-green economy?					
Are there organizations that monitor the efficiency of the use of water resources in the long term?					
Does the education system at all the levels include teachings about environmental sustainability)					
Is there a pollution control system?					
Contamination and risks					
Variables	Indicators				
	Low	Medium	High		
How would you consider soil contamination in your territory?					
How would you consider water pollution in your territory?					

How would you consider air pollution in your territory?			
Do you think people are aware of the risks of pollution and climate change?			
Commitment of people			
Are there organizations and/or institutions committed to environmental sustainability and the green economy?			
Do you think people have consistent behaviours to safeguard the environment?			
Green economy practices			
Variables	Indicators		
	< 25%	26-50%	>50%
How many companies in the value chain practice solutions for environmentally friendly production?			
Are there initiatives for promoting participation of people to protect the environment?			
Are there volunteer groups to protect the environment?			
Access to environmental resources			
Variable	Easy	Not bad	Difficult
How is the access to water for the value chain actors?			
How is the access to electricity for the value chain actors?			
How is the access to public resources (like rivers, lands,...) for the value chain actors?			
How is the access to private resources (land properties) for the value chain actors?			

In conclusion, the assessment results suggest

Public relations:

- Make pressure on government for improving the environmental sustainability, and the regulation for the protection of natural resources, the transition to a clean environment, and the achievement of the Sustainable Development Goals
- Make pressure on increasing and improving the natural reserves and protected areas,
- Make pressure on government for establishing incentives to stimulate the green economy
- Improve measures for reducing the soil and water pollution
- Work for establishing a monitoring system on the efficiency of the use of water resources in the long term
- Make pressure on public authorities for an education system that includes teachings about environmental sustainability, through better communication and cooperation between the Ministry of Education and the Ministry of the Environment is desirable to explore effective solutions

Contamination and risks

- Realise initiatives for sensitizing people on the risks of soil and air pollution and climate change

Commitment of people and organizations

- Sensitise, realise capacity building, and other initiatives for increasing the commitment on environmental sustainability and the green economy. (The population is aware but often still engages in behaviours that damage the environment). The focus groups suggests reforestation campaigns; competitions between villages and rewarding with certificates for the "cleanest village" (give a letter of appreciation, or award with money); long-term education, not necessarily with coercive measures such as cameras.

Green economy practices

- Increase the number of enterprises that practice solutions for environmentally friendly production
- Increase and improve the initiatives for promoting participation of people to protect the environment
- Increase the number of volunteer groups to protect the environment. (Environmental cleaning campaigns are not enough, the involvement of local authorities is necessary, starting with the installation of an increasing number of dustbins and sanitary services.

Access to environmental resources

- Improve the access to water and electricity for the value chain actors. Especially to the water, since the water from the wells resides in very deep aquifers and there is not enough energy to pump it.

4.6 Circular economy

The focus group assessed circular economy needs for the tourism value chain, through the following components

- Waste management
- Services
- Business performance

The following table shows the results of the assessment.

Table 4. Circular economy needs related to the Eco-tourism value chain in the Ratanakiri Province
(Source. ILS LEDA RESCO Focus Group, 2024)

Waste management			
Variables	Indicators		
	No	Weak	Yes
Are there companies that selectively collect waste for reuse it within the companies in the value chain? (1)			
Are there companies for the storage of this waste? (2)			
Are there companies that sell this waste?			
Are there companies in the value chain reuse wastewater to recycle it?			
Are there companies that sell recycled organic waste? (3)			

- (1) They do not separate the garbage, which is generally collected together and burned. Only in very few areas, mainly the larger hotels in urban areas, is it possible to separate plastic and paper, but at the time of collection, the private company (contracted by the municipality) throws everything into a single bin, frustrating the effort.
- (2) Only aluminium is recycled, individual and informal people who buy aluminium and sell it.
- (3) There are very few cases of recycling of organic waste for fertilizers and compost, but this is a domestic dimension of private citizens

Services			
Is there research to find innovative solutions for the circular economy of the tourism value chain?			
Are there strategic measures to avoid loss of biological diversity?			
Are there measures for the effective management of natural and cultural heritage?			
Are there university courses in the field of circular economy?			
Are there professional training courses in the field of circular economy?			
Business performance			
In your opinion, what is the cost of energy consumption over total production costs for company of the tourism value chain?			
In your opinion, how is the cost of water consumption compared to the total production costs for a company of the tourism value chain?			
In your opinion, what is the participation of renewable energies in the total energy consumption of companies in the value chain? (4)			
In your opinion, how many companies of the value chain adequately treat wastewater from renewable sources?			

(4) Only solar panels, mainly for domestic use, the rest of renewable energy is not used because it is expensive to install and maintain and the government does not give incentives of this type.

In conclusion, circular economy practices are very much ignored in the province, with rare exceptions.

The Focus Group result accordingly relies on the following needs

Waste management

- Enhance the creation of companies that collect waste selectively, store it, and sell it
- Sensitise and support companies to recycle and reuse wastewater to recycle it

Services

- Stimulate the research to find innovative solutions for the circular economy
- Make efforts for an effective management of natural and cultural heritage
- Stimulate universities, and professional school to introduce education on circular economy

Business performance

- Stimulate and educate enterprises to make plans for reducing the energy, and the water consumption
- Stimulate, educate, and support enterprises to increase renewables energies
- Stimulate, educate, and support enterprises to reuse renewables resources (specially water)

4.7 Resilient economy

The focus group assessed resilient economy opportunities and needs for the tourism value chain, through the following components

- Vulnerability risks
- Risk prevention
- Resilient recovery post catastrophe opportunities
- Long-term environmental sustainability opportunities (contribution to the mitigation of climate change impact)
- State Regulation about resilience and climate change

Vulnerability risks

- They are mainly risks of Floods, and Hurricanes/Storms/Typhoons/Tornados, that make at risk of
 - a) people left without job
 - b) damage to general infrastructure, tourism infrastructure, market, health care, education infrastructure, and transport.

The following table shows the results of the assessment.

Table 5. Resilient economy opportunities and needs for the Eco-tourism value chain (Source. ILS LEDA RESCO Focus Group meeting, 2024)

Resilient recovery post catastrophe opportunities from the tourism value chain			
Variables	Indicators		
	Little	So and So	High
Ability to provide goods needed in emergencies after catastrophes, such as food, blanquets, household utensils (arts&crafts), etc.			
Ability to provide services, such as transportation, and communication			
Possibility of using qualified labor to support other productions (accountants, digital experts,)			
Ability to offer shelter needed in emergencies after catastrophes			
Long-term environmental sustainability (contribution to the mitigation of climate change impact)			
Abating polluting waste			
Reduction of energy from non-renewable sources and CO2 emissions			
Use of "green" products: not including polluting components, including only natural elements and materials, products of reuse and regeneration			
Use of products with a long life cycle			
Reduction of food emission and food waste and promoting the use of local producers			
Use of no contaminating transport			
Assurance against climate changes risks			
State Regulation about resilience and climate change			
In your opinion is the Government at work for providing a effective policy for favouring resilience and mitigating the effects of the climate change?			
There is foreseen Income continuity for workers, and for enabling restart operations of companies at the end of an emergency situation?			
There Is foreseen kind of security for tourist activities, covering risk situations arising from extreme natural events?			
There are kind of assurance against risk of disasters?			

The Focus Group result accordingly relies on the following needs and opportunities for facing catastrophes, in particular floods, and hurricanes/storms/typhoons/tornados, that make at risk jobs, and damage to infrastructure:

Resilient recovery post catastrophe opportunities from the tourism value chain, that can provide

- Qualified labour to support other productions (accountants, digital experts,)
- Shelter needed in emergencies after catastrophes

Long-term environmental sustainability measures

- Facilitating abating polluting waste
- Reduce of energy from non-renewable sources and CO2 emissions
- Use of "green" products, and products with a long life cycle
- Reduce food emission and food waste, from local producers
- Use no contaminating transport
- Promote assurance against climate changes risks

4.8 Gender equality

The focus group assessed gender equality needs for the tourism value chain, through the following components

- Access to resources: there is satisfactory equality either for accessing to general resources, labour, and business services, whereas access to finance is more complicated, because men are considered more "bankable"
- State regulations: they are very weak, either in making strategy, or measures, or services. When a bill is issued, they are not properly implemented
- Women included in the value chain

The following table shows the result of this assessment.

Table 6. Gender equality assessment in the eco-tourism value chain (Source. ILS LEDA RESCO Focus Group meeting, 2024)

Variable	Indicators		
How many women work in the subjects included in the chain?	Less than 20% of the total number of employees	21-40%	40-60%
Hotel			
Restaurants			
Tour operator			
Nutrition			
Transport			
Cultural activities			
Folk arts and crafts			
Improving competencies			
Financing			
(B) How many women generally work in the value chain			
(C) How many women are business owners in the chain			
(D) How many women are managers in enterprises in the chain			
(E) How many women hold key positions in local			

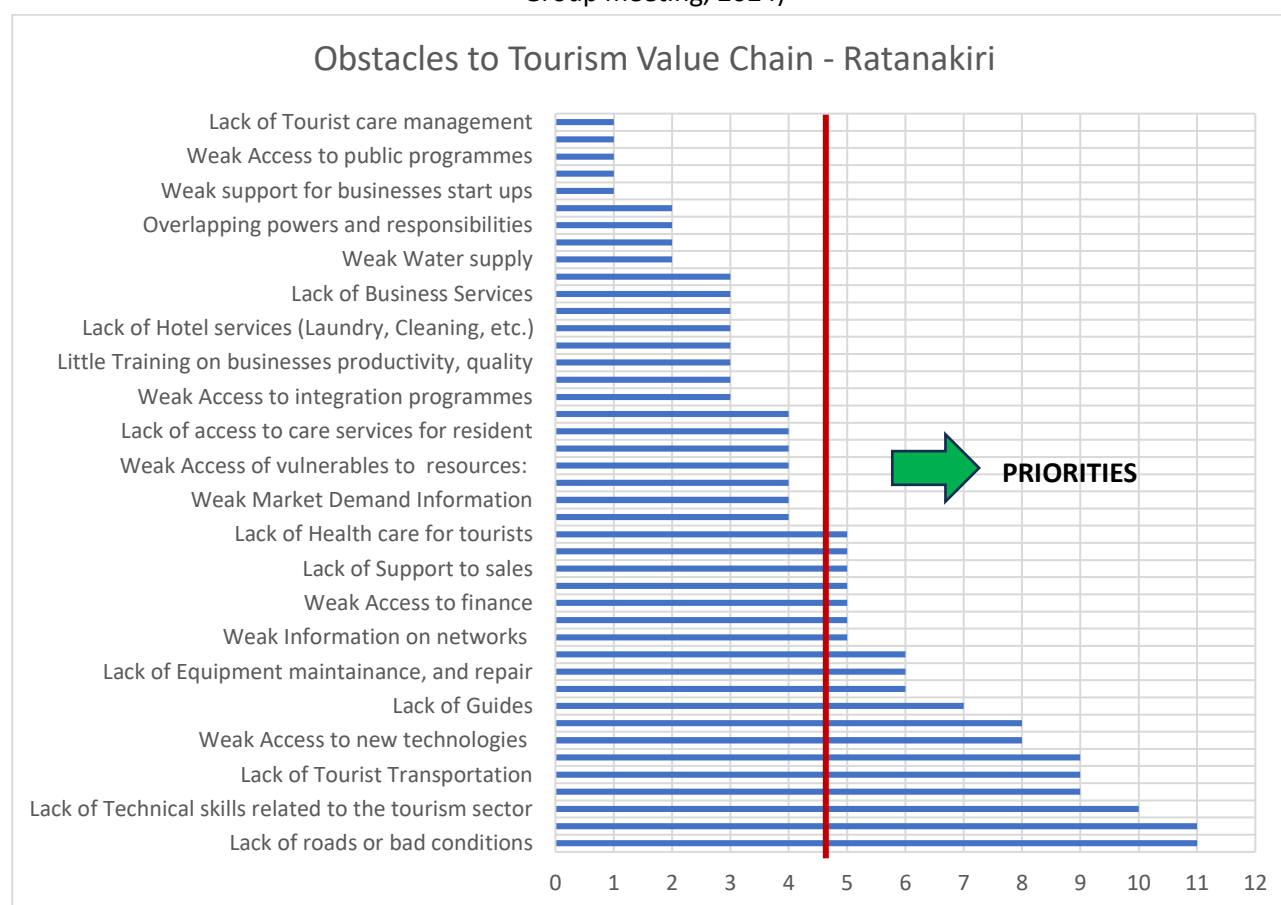
To sum up, women are quite discriminated, and they need

- Strong support for accessing to job opportunities, mainly in the case of transport, financing, cultural activities,
- Some support for accessing to job opportunities in cultural activities, business ownership, and business management
- Support for accessing to key positions in local government

4.9 Obstacles

As for the obstacles faced in the eco-tourism value chain in the Ratanakiri province, the following table shows the results of the RESCO assessment conducted through the focus group meeting.

Table 6. Obstacles to the Eco-tourism value chain in Ratanakiri, Cambodia (Source. ILS LEDA RESCO Focus Group meeting, 2024)



To sum up, the main obstacles, that need to be removed, regard are:

- Lack of roads or bad conditions
- Lack of Museums, and entertainment
- Lack of Technical skills related to the tourism sector
- Weak Entrepreneurial support

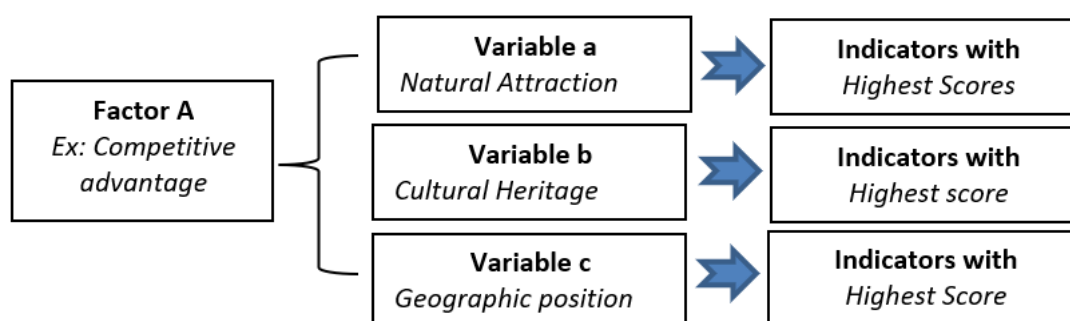
- Lack of Tourist Transportation
- Lack of Marketing strategy
- Weak Access to new technologies
- Weak telecommunication infrastructure
- Lack of Guides
- Electricity system bad condition, use of new resources
- Lack of Equipment maintenance, and repair
- Lack of networking with other CSO
- Weak Information on networks
- Weak Information for tourists
- Weak Access to finance
- Scarcity of other sources of energy
- Lack of Support to sales
- Lack of Networking services
- Lack of Health care for tourists

Chapter 5. THE STRATEGIC GUIDELINES FOR COMPETITIVE AND INCLUSIVE DEVELOPMENT

5.1. The methodology for the elaboration of the Strategic Guidelines for the eco-tourism value chain development

The RESCO methodology for the elaboration of the Strategic Guidelines for the beef and dairy cattle value chain development uses the inputs proceeding from the RESCO assessment (interviews), from the analysis of the secondary literature, and from the consultations with experts, and classifies all these findings in a number of fields of intervention.

The inputs refer to the impact indicators of each variable corresponding to each factor either if it is positive (points of strengths), or negative (points of weaknesses), as illustrated in the following example.



The correspondent strategic actions should be addressed in order to:

- Maintain the points of strengths in the long term;
- Remove the points of weaknesses, as they represent obstacles to the development of the value chain.

RESCO, finally, uses a simple algorithm for deriving the strategic actions for each one of the “variables” corresponding to the different “factors”.

In particular, the formula is, as follows:

$$Sa = f(V_{ij}, Fa_n)$$

Sa = Strategic Actions

V_{ij} = Variable “i” of the Component “j”

Fa_n = Factor “n”

5.2. From potential and needs to action

The main potential and needs referred to each factor and correspondent variable were illustrated in chapter 5.

The process from addressing strategic action to the abovementioned needs foresaw:

1. Identifying individual action for each variable
2. Clustering complementary actions
3. Eliminating duplications
4. Including each action in correspondent “strategic fields”

Accordingly, the RESCO assessment has also provided at least three strategic fields of action, such as

- a) Governance
- b) Capacity Building
- c) Service System

Each one of them addressed to common targets, such as

- I. *Establishing a platform for social dialogue, aimed at strengthening permanent job opportunities for target people*
- II. *Enhancing social sustainability, and inclusion*
- III. *Enhancing environmental sustainability and reducing the climate change impact*

The following box shows how each strategic field contribute to the achievement of the objectives

Considering the priorities emerged from the analysis of the eco-tourism value chain status and potential, and the CLESIDRA Project goals, these strategic actions are clustered according to three levels of priorities:

- **Priority No. 1:** *Actions correspondent to the objectives and proposals of the CLESIDRA Project (see Box 1), and, at the same time, correspondent to the “High Priorities (HP)” indicated by the RESCO group.*
- **Priority No. 2:** *Actions correspondent to the “High Priorities (HP)” indicated by the RESCO group, but not explicitly foreseen by the CLESIDRA Project plan of activities and budget.*
- **Priority No. 3:** *Actions correspondent to the “Medium Priorities (MP)” indicated by the RESCO group.*

BOX 1. CLESIDRA WORKPLAN

WP1 - Improving the skills of CSOs, producers and LAs on multi-stakeholder dialogue, integrated socio-economic development

A1.1 Capacity building workshops for CSOs on active participation in decision-making processes and multi-stakeholder dialogue.

A1.2 Capacity building workshops on inclusive socio-economic development and value chain competitiveness and sustainability.

A1.3 Capacity building workshops and support to upgrade CSOs’ organisational capacity (internal governance, impact, human and financial resource management, advocacy, project formulation and management)

A1.4 Capacity building workshops and technical assistance to CSOs on sustainable production techniques/methods, preservation of natural resources and security of smallholder farmers (incl. rights to tenure)

WP2 - Establishment of the multi-stakeholder PLASED platform

A2.1: Delivery of technical assistance in the PLASED platform’s design and start-up

A2.2: Inception of the PLASED platform and implementation of strategic actions

A2.3: Development, publication and circulation of a booklet on the PLASED experience

WP3 - Participatory elaboration of the Strategies (STRAT) for the competitive, inclusive, sustainable and resilient value chains’ development

WP4 - Establishment of a Comprehensive Service System (COSS)

A4.1 Mapping and analysis of the service providers/infrastructure in the Ratanakiri Province

A4.2 Technical assistance for designing the COSS

A4.3 Capacity building and technical assistance to the COSS start up

A4.4 Capacity building workshops to improve skills of the single service providers and address service system gaps

A4.5 COSS start up and provision of financial support to selected COSS users (Financial support to Third Parties)

The strategic vision for the Eco-tourism development.

The first result of the RESCO assessment is the identification of a Strategic Vision for the Tourism Value Chain development to be achieved in 2030 and consists in **“Increasing at least by 30% the number of tourists staying at least 2 nights on average, counting to uniqueness of the attractions, the protection of the environment and the cultural heritage, while providing jobs mainly to the most disadvantaged people”**. As a matter of fact, tourists coming to Ratanakiri can enjoy -in a relatively restricted area- several unique and differentiated attractions, such as natural attractions, mountains and forests, national parks, waterfalls, natural lakes, rivers and water rapids, old volcanoes, birdwatching, sporting and recreational activities, ethnical culture and villages, with their handicrafts, art exhibition, traditional music, including dances, songs and musical instruments, stories and legends, sacred places.

5.3. The Strategic Guidelines and Action Plans in details

The strategic guidelines for action are described with reference to:

- ⊗ the priorities, as previously defined,
- ⊗ the strategic field: Governance, Services, and Capacity Building
- ⊗ the strategic goals: Establishing a platform for social dialogue, aimed at strengthening permanent job opportunities for target people, enhancing social sustainability, Enhancing environmental sustainability and reducing the climate change impact.

PRIORITY No. 1

A1.1: GOVERNANCE

A1.11: Establishing a platform for social dialogue, aimed at strengthening permanent job opportunities for target people (through maintaining competitive advantage, valorising authenticity, and safeguarding its environmental conditions), and making a plan for:

- (a) facilitating the socio-economic inclusion of women, youth, indigenous, and the most marginalized and vulnerable people, in the value tourism chain, through valorising the tourism resources
- (b) enhancing the number and the quality of the attractions to visit, to enjoy, and to know, enhance nice hospitality
- (c) lobbying towards National Government for strengthening the regulations and plan in favor of the environmental protection, and incentive for realising correspondent businesses and initiatives, and improving the infrastructure for accessing to places of ethnical culture
- (d) promoting, organising and raising funds for Events, Leisure and Entertainment
- (e) strengthening the accessibility of tourist to Ratanakiri: airport, comfortable roads; health infrastructure

This Activity corresponds to the CLESIDRA actions of the work plan WP2 (A2.1)

A1.2 SERVICES

A1.21: Providing technical support to

- (a) Craftsmanship, mainly linked to the ethnic culture, and business building furniture with local material and design
- (b) networking services, mainly among service providers
- (c) realising an agreement with one or more national tourist operators

This Activity corresponds to the CLESIDRA actions of the work plan WP4 (A4.4)

A1.22: Support the start-up of businesses realizing by-products, such as:

- Accommodations and restaurants' furniture and supplies
- Accommodation and equipment maintenance, and repair
- Infrastructure construction and maintenance
- Transportation: owning taxis, luxury buses, and boats.
- Transport maintenance
- Travel Agents, and Tour Operators and guides
- Products from recycling: organic for agriculture fertilisers; many products from plastic (including craftsmanship), Craftsmanship from wasted wood (supplies, craftsmanship), and metals

This Activity corresponds to the CLESIDRA actions of the work plan WP4 (A4.5)

A13: CAPACITY BUILDING

A1.31: Capacity building for maintaining competitive advantage, valorising authenticity, and safeguarding its environmental conditions, with particular reference to making aware local actors and population about the importance of tourism and tourists for the regional development, and their role of testimonial for attracting them

This Activity corresponds to the CLESIDRA actions of the work plan WP1 (A1.2)

A.13.2: Improve professional skills, with reference to:

- Tourist operators
- Tourist guides
- Room and food and service; sommelier; cleaning service (a service other than domestic cleaning).
- Organization of tourist packages and tourist guide services
- Hygiene and health (waste collection and disposal)

This Activity corresponds to the CLESIDRA actions of the work plan WP1 (A1.4)

A1.32: Capacity building for social sustainability, through

- (a) Building capacities for women to facilitate:
 - Accessing to job opportunities, mainly in the case of transport, financing, cultural activities
 - Accessing to key position in public administration
- (b) Building capacity to individuals with different physical and mental abilities, for using the job opportunities

This Activity corresponds to the CLESIDRA actions of the work plan WP1 (A1.2)

A2.1: GOVERNANCE

A2.11: Realising territorial marketing strategies, through a base-map including various attractions at a local level, proposal of tourist itineraries; brochures in different languages; creation of an app for tourism information services at a regional level

A2.12: Enhancing social sustainability, through lobbying with Government for:

- for facilitating inclusion of individuals with different physical and mental abilities
- for facilitating access of women to key position in the public administration

A2.13 Enhancing environmental sustainability and reducing the climate change impact, through lobbying towards National Government, and strengthening the regulations and plans in favour of the environmental protection, and incentive for who realizes correspondent businesses and initiatives

A22 SERVICES

A2.21: Improving services for enhancing environmental sustainability, with particular reference to support companies for introducing or improving solutions for environmental sustainability: water and electricity efficiency and cost reduction; CO2 emissions; waste management; increase the products life; use of recycled material, etc.

A2.22: Strengthening following services:

- Technical, administrative, organizational services
- Access to finance
- Participation to international fairs
- Services to tourists: Information, Guiding, Transport, Booking, etc.

A2.23: Finding out a mechanism for facilitating financing to the value chain through the local financial institution

A23: CAPACITY BUILDING

A2.31: Building capacities of entrepreneurs for adopting solution for environmental sustainability, regarding

- water and electricity efficiency and cost reduction;
- CO2 emissions;
- waste management;
- increase the products life;
- use of recycled material
- Use of renewables energies

A2.32: Building capacities for setting up and managing Ratanakiry marketing strategy

A2.33: Building capacities of the value chain actors to letting them easy access to national and international funds, also through exposure to best practices related to new technologies in tourism

A2.34: Building capacities for enhancing environmental sustainability, through:

- (a) identifying best practices of environmental protection and work for its adaptation to the Ratanakiri context: Reduction of CO2, de-contamination soil and water, circular economy practices, etc.
- (b) establishing a monitoring system on the efficiency of the use of water resources in the long term
- (c) realising initiatives for sensitizing people on the risks of soil and air pollution and climate change, and protection measures
- (d) build capacities for the intervention of the VOGÉ

PRIORITY No. 3

A3.1 GOVERNANCE

A.3.11: *Using the PLASED for:*

- (a) Realising a unique public-private center for common purchase of furniture
- (b) Realising a territorial booking centre and management;
- (c) Enhancing environmental protection, with particular reference to
 - Establishing a monitoring system on the efficiency of the use of water resources in the long term
 - Organising the provincial Voluntary Groups for Environment (VOGE)
 - Realising an agreement with research institutes for finding out innovative solutions for the circular economy: Regenerate-ReUse-ReCycle
 - Lobbying with government to introduce a mechanism for facilitating assurance against climate changes risks

A3.2: SERVICES

A3.21: Supporting tourist operators for facilitating introduction of new technologies

A3.22: Strengthening services for environmental protection, such as:

- Realising prediction and prevention of risks of anthropic origin, and natural origin
- Measuring and monitoring environmental contamination, Information on the environment
- Supporting-consultancy to eco-compatible businesses and initiatives, and facilitating financial support to eco-businesses
- Supporting the creation of companies that collect waste selectively, store it, and sell it

A3.3 CAPACITY BUILDING

A3.31: Building capacity for managing accommodation, and all the tourism related activities

A3.32: Building capacities of local actors in

- managing civil dialogue and collective decision making
- Marketing and customer focus
- Leadership

Synthesis of main strategic guidelines

The following box illustrated the synthesis of the Rice values chain development strategic guidelines for **priority 1, and 2**

Box 2. Synthesis of the Eco-tourism value chain development guidelines for priority 1 (Source. ILS LEDA)

PRIORITY 1	DESCRIPTION
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GOVERNANCE	Establish a TOURISM Development Committee, on the base of the focus group participants, and as a PLASED sub-group mainly for facilitating the socio-economic inclusion, enhancing the number and the quality of the attractions, enhance hospitality, lobbying towards National Government for strengthening the regulations and plan in favor of the value chain, raising funds, strengthening the accessibility of tourist to Ratanakiri
CAPACITY BUILDING	Making aware local actors and population about the importance of tourism and tourists
	Professional skills, such as tourist operators, tourist guides; Hotel and restaurant services
	Building capacities for women to facilitate access to job opportunities, Accessing to key position in public administration
	Building capacity to individuals with different physical and mental abilities, for using the job opportunities
SERVICES	Establishing a comprehensive support service with particular reference to: technical support to Craftsmanship, networking services, realising an agreement with one or more national tourist operators
	Support the start-up of businesses realizing by-products

Box 3. Synthesis of the Eco-tourism value chain development guidelines for priority 2 (Source. ILS LEDA)

PRIORITY 2	DESCRIPTION
GOVERNANCE	Realising territorial marketing strategies,
	Enhancing social sustainability
	Enhancing environmental sustainability
CAPACITY BUILDING	Building capacities of entrepreneurs for adopting solutions for environmental sustainability
	Building capacities for setting up and managing Ratanakiry marketing strategy
	Building capacities of the value chain actors to letting them easy access to national and international funds,
	Building capacities for enhancing environmental sustainability,
SERVICES	Improving services for enhancing environmental sustainability
	Strengthening services, such as Technical, administrative, organizational services, Access to finance, Participation to international fairs, Services to tourists: Information, Guiding, Transport, Booking, etc.
	Finding out a mechanism for facilitating financing to the value chain through the local financial institution

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