

**KINGDOM OF CAMBODIA
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ROYAL GOVERNMENT OF CAMBODIA

**Tourism Development
Master Plan Siem Reap
2021-2035**

Approved by the Royal Government on 30th March 2021



Samdech Akka Moha Sena Padei Techo Hun Sen

Prime Minister of Cambodia

Preface

From the “**Win-Win Policy**”, Cambodia has fully obtained peace, political stable, security, and order. The hard-won peace is the solid foundation of development in all areas, including tourism, which has gone through a long period of development. The Royal Government of Cambodia (RGC) has mightily strived to develop Cambodia’s tourism sector in the sustainable and responsible manner, where it has succeeded a proud achievement, with the growth of **nearly 300,000** international tourist arrivals in **1998** to **more than 6.6 million in 2019**. Cambodia has to continue to strive for the future goals, which require the establishment of a national development direction that can manage obstacles and offer hopes with certainty, and maintain harmony and sustainability of its progress. With this in mind, **the adoption of the Tourism Development Master Plan Siem Reap 2021-2035** reflects the commitment of the RGC that considers “**Tourism as Green Gold**”, which contributes to socio-economic development, national cultural promotion, and effective environmental protection.

The RGC is strongly committed to the development of the tourism in Siem Reap and the surrounding area to be a “**quality tourist destination**” that has thorough management on the tourism development, and minimizes negative impacts on the Angkor heritage site and natural resources in order to attract revisit tourists, especially up-market tourists in order to increase the incomes of the nation and local people.

Besides the famous Angkor Wat and many other ancient temples that cover an area of **401 square km**, which was inscribed on the UNESCO’s World Heritage List in 1992, Siem Reap also has many valuable resources such as the Phnom Kulen National Park, the ancestral sacred land and the former capital of the Khmer Empire, and the

Tonle Sap Lake region, stands rich biodiversity and rare resources. In addition, Siem Reap city also has been transforming into a modern heritage city with the growth of tourism establishments such as hotels, restaurants, shops, etc. Whereas, the surrounding area is embedded in the traditions that continue to adhere to in local daily life with the warm smiles of Khmer people.

In order to be able to comply with the vision of the sustainable development, the Master Plan needs to be comprehensive, which includes both **cultural tourism and natural tourism**, while currently visiting the Angkor Wat temple is the only major reason for traveling to Siem Reap province. This Master Plan aims to study and identify strategies to increase the attractiveness of the entire Siem Reap as well as the surrounding area, where it offers a variety of recreational activities in addition to temple visiting. In this regard, Siem Reap must strengthen her qualifications to seize the opportunities available in the international market and be ready for new challenges such as the current economic slowdown, trade wars between superpower countries, and the impacts of the Covid-19 pandemic.

The Tourism Development Master Plan Siem Reap 2021-2035 must adhere to the principles of preserving and utilizing these cultural and natural benefits to the maximum by expanding the recreational activities and entertainment events to increase the satisfaction of visitors and attractiveness of the province and leads to extend the length of stay and increase expenditure of visitors, as well as capture higher value from tourism for the benefits of the people in Siem Reap and the nation. The Master Plan has been set out based on **2 basic approaches**:

1. Sustainable management of both tangible and intangible heritage assets with outstanding value.
2. Responsible and inclusive development with the consideration of local socio-economic benefits.

The RGC strongly believes that the introduction of the Tourism Development Master Plan Siem Reap will be a vital mechanism to respond to the current and future situations, and especially to achieve the common purposes as follows:

Purpose 1: Siem Reap will become an attractive international tourist destination with global recognition of cultural heritage and natural resource conservation and protection, offering a vast variety of tourism assets and attractions.

Purpose 2: to ensure maximum socio-economic benefits from tourism, means the historical Angkor heritage site, city with Siem Reap river, the Tonle Sap Lake region, Phnom Kulen National Park, and rural tourist destinations must be linked to local economic development and poverty alleviation.

Purpose 3: Siem Reap must be a **quality tourist destination**, attracting tourists to visit again and again, as well as attracting up-market tourists to increase incomes to local people and inclusively promote the local economy.

Based on the concept of **comprehensive tourism development**, I would like to express my support for the introduction of the strategic plan and concrete recommendations set in the “Tourism Development Master Plan Siem Reap 2021-2035”, **based on 2 timelines:**

1. Set out **short-term recommendations (2021-2023)** with the introduction of urgent measures to ensure the positive growth of tourism and manageable tourism, especially the management of tourist flows.

2. Set out **medium-term (2024-2030) and long-term (2031-2035)** recommendations to introduce long-term measures for the tourism development in Siem Reap to ensure sustainability and to become a quality tourist destination in the medium- and long-term by prioritizing the conservation of the sustainability of cultural heritage and natural resources, along with the diversification of tourism products and activities with quality that provide equitable and inclusive benefits to local people.

The overarching framework of the vision of the **Tourism Development Master Plan Siem Reap 2021-2035** is “to recapture the pride as the major tourist destination in Cambodia and Southeast Asia region”.

To achieve the abovementioned vision and purposes, the RGC has identified Siem Reap to be a quality tourist destination by 2035. Based on the concept of “**conservation for development and development of conservation**”, it requires “we

think, we act, we care” of all stakeholders from the **public-private-people-development partners**. In this manner, the **Government** has the role to create a conducive environment for the implementation of the action plan set out in this Master Plan, and to intervene when necessary to orient the market mechanism to ensure that all stakeholders can actively participate in tourism development activities and the equitable benefit sharing from the development **“without leaving anyone behind”**. In this regard, the introduction of policies, development goals, regulations, and management procedures requires the **6 priority tourist zones** (Jayavarman-Norodom “Phnom Kulen” National Park, Banteay Srey protected area’s surroundings, Angkor Heritage site, Siem Reap City, Tonle Sap Lake area, and New Siem Reap) to have thorough management mechanism under the utilization of respective **Destination Management Organization**, support on public and private tourism investment, and provision of infrastructure and necessary facilitation for relevant institutions since tourism is cross-sectoral.

On behalf of the Government, I would like to appeal to all stakeholders to prioritize this Master Plan in order to contribute to the promotion **of tourism as a true Green Gold** and a sector that contributes to the achievement of the Sustainable Development Goals 2030.

Phnom Penh, 30th March 2021

Hun Sen

Tourism Development Master Plan Siem Reap 2021-2035

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Introduction

Besides the world-famous Angkor Wat Temple and other temples, Siem Reap province has plenty of valuable resources including Phnom Kulen National Park and the Tonle Sap Lake, home to rich ecosystems and scarce resources. At the same time, Siem Reap city has been transforming into an attractive heritage city with the growth of local tourism business establishments such as hotels, restaurants, shops, etc. Whereas, the surrounding area is embedded in the traditions that continue to adhere to in local daily life with the warm smiles of Khmer people.

Since Siem Reap province is the heart of Cambodia tourism, the scope set up in the Tourism Development Master Plan Siem Reap are inclusive, where cultural tourism, natural tourism, ecotourism and other tourism types are included, while visiting Angkor Wat temple is currently the only major reason that tourists choose to visit Siem Reap province. The Master plan studies and identifies strategies and action plans to better the attractiveness of the entire Siem Reap province by adding a variety of recreational activities making it has more than the temples to offer.

The qualifications of Siem Reap province shall be improved in order to seize opportunities available in the international tourism markets as well as to get ready to address new challenges such as the global political and economic tensions and the impacts of the Covid-19 crisis, for the recent number of tourist arrivals in Siem Reap has decelerated and slightly inclined in 2019 while the sector remained developing in the national level. Furthermore, during 2020, Cambodia and Siem Reap tourism have been dramatically suffering from the Covid-19 crisis. Therefore, the RGC strongly believes that the Tourism Development Master Plan Siem Reap will be a fundamental strategic tool to respond to current and future situations that can be taken part in Cambodia's 2030 and 2050 vision. In the setting, the Tourism Development Master Plan Siem Reap is developed for a period of 15 years, from 2021 to 2035.

1. Vision

The long-term tourism vision for 2021-2035 defined in the Tourism Development Master Plan Siem Reap is: **“Siem Reap will become an attractive**

international tourist destination with quality, offers a variety of tourism resources, with global recognition of cultural heritage and natural asset conservation and protection, and attract tourist to visit again and again, linked with the local economic development, poverty alleviation, and climate change responses”.

2. Objectives

The strategic objectives of the Tourism Development Master Plan Siem Reap 2021-2035 is to transform the province into the major and attractive tourist destination in the region and the world based on the foundation of the cultural natural and historical heritage, religion, and Cambodianess. To ensure sustainable and inclusive manner in tourism development, Siem Reap shall follow good practices from all eras, especially the Angkor Empire era, as well as take into account the “**Clean, Green and Smart**” in this modern setting and the path to building a digital economy.

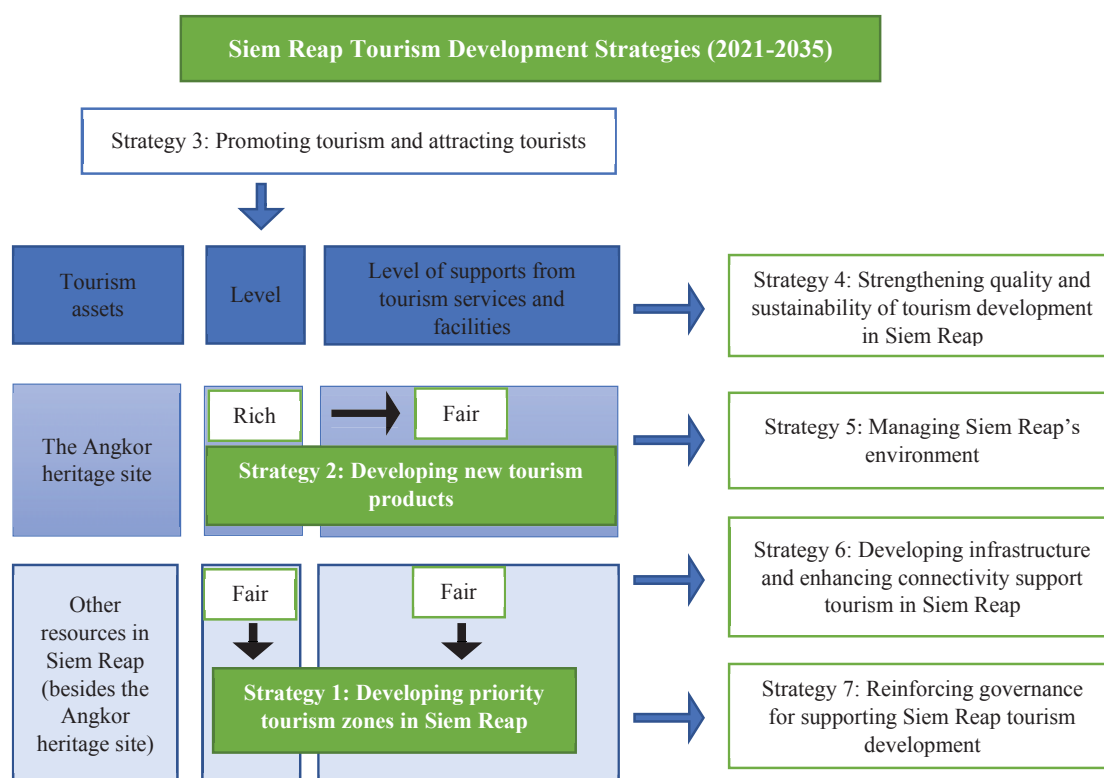
The Tourism Development Master Plan Siem Reap 2021-2035 sets **03** complementary strategic objectives: **1. High quality tourism; 2. Smart tourism; and 3. Tourism that balances the development and conservation of cultural and natural resources.**

3. Goals

To achieve the above mentioned goals, the Tourism Development Master Plan Siem Reap 2021-2035 defined **07 strategic goals**: 1. Developing priority tourism zone in Siem Reap; 2. Developing new tourism products; 3. Promoting tourism and attracting tourists; 4. Strengthening quality and sustainability of tourism development in Siem Reap; 5. Managing Siem Reap’s environment; 6. Developing infrastructure and enhancing connectivity support tourism in Siem Reap; and 7. Reinforcing governance for supporting Siem Reap tourism development based on the **participatory approach**.

To achieve the Vision, Objectives and Goals, the master plan developed **07** priority strategies as shown in the diagram below:

Diagram explains the Siem Reap Tourism Development Strategies 2021-2035



In this manner, the implementation of the Siem Reap Tourism Development Strategies 2021-2035 requires the adherence to the participatory approach from multi-stakeholders: **public-private-people-tourists and development partners**. The implementation of the approach also needs to comply with the Siem Reap Declaration of Tourism and Culture-Building a New Partnership Model, and especially in line with the high recommendation of **Samdech Akka Moha Sena Padei Techo Hun Sen Prime Minister of Cambodia**, in the open ceremony of the World Conference on “**Tourism and Culture: Building a New Partnership**” at **Le Meridien Angkor Hotel** in Siem Reap on February 4, 2015, which stated that: “**Together in each national framework to promote sustainable cultural tourism development. In this sense, we need to place emphasis on four fundamental elements including: (1). Promoting investment and developing innovative and memorable cultural tourism products for tourists as well as increasing marketing and promotion; (2). Strengthening the quality of cultural tourism products; (3). Adopting innovative technologies in tourism and culture; (4). Improving synergy between tourism and culture.**”

Chapter 1

An overview and analysis of development scenarios for Siem Reap tourism (2021-2035)

Part 1: Analysis of tourism situation in Siem Reap

Part 2. Analysis of development scenarios for Siem Reap tourism

Chapter 1: An overview and analysis of development scenarios for Siem Reap tourism (2021-2035)

Part 1: Analysis of tourism situation in Siem Reap

1. Trends of Siem Reap tourism

Over the past 20 years, Siem Reap tourism has been developed at a noticeable growth rate, at which the number of international tourist arrivals doubled (from 1.3 million in 2010 to approximately 2.5 million in 2018), with an average yearly growth rate of more than 15%. This demonstrates the remarkable development of Siem Reap tourist destination in the development phase.

However, due to a number of internal and external challenges, the number of tourist arrivals dropped in 2019, at which the international tourist arrivals decreased to 2.2 million (-14.86%), and the domestic tourist arrivals to 2.05 million (-36.7%). In terms of market share among Cambodia's major tourist destinations, Siem Reap captured a large share of about **41%** of international tourist arrivals in Cambodia between 2015 and 2018. But in 2020, this market share dropped to only about **30%**.

Overall, the trend of international tourist arrivals in Siem Reap has been fluctuated, in which Siem Reap experienced four times remarkable drops (as shown in Figure 1 in Appendix) **caused by major factors** as: **1st time**: in 1997, the drop of international tourist arrivals caused by the global financial crisis; **2nd time**: in 2003, the number of international tourist arrivals was steady, caused by the SARS outbreak crisis; **3rd time**: in 2008 and 2009, the drop of international tourist arrivals caused by the global economic crisis; **4th time**: in 2019, the drop of international tourist arrivals due to the diversification of tourism products has not yet responded to the global tourism trends.

In particular, Siem Reap tourism in 2020 unprecedentedly declined in the past 20 years due to the effects of the Covid-19 crisis that lasted from the end of 2019 to the present. In fact, in 2020, Siem Reap received only approximately **400,000 international tourists, down 82%**, and approximately **700,000 domestic tourists, down 66%**.

In this context, it is required to consider on restoration and promotion of Siem Reap tourism through setting its development direction to be a quality tourist destination

by strengthening the quality of the existing tourism products as well as creating new products, increasing tourism promotion capacity, developing human resources in the sector, and setting strategic plans to increase local participation in tourism production chains to reduce tourism economic leakages in the province.

2. SWOT Analysis of Siem Reap Tourism

From the study of the current trends and surveys with stakeholders, Siem Reap tourism has the following strengths, weaknesses, opportunities and threats:

Table 1.1 SWOT Analysis of Siem Reap

Strengths	Weaknesses
<p>1. Cambodia is fully peaceful and has developed in all sectors under the right and wise leadership of Samdech Akka Moha Sena Padei Techo Hun Sen Prime Minister of Cambodia, which has brought tourists’ and investors’ confidence and trust; “Thanks to Peace”.</p> <p>2. Siem Reap owns the world-famous “Angkor Wat Temple”, which was inscribed on the World Heritage List in 1992, along with the other unique assets that are potential for creating new priority tourist destinations with a vast variety of cultural, natural and man-made tourism products.</p> <p>3. The adherence to the traditions in daily life with the warm smiles of Khmer people also contribute to attracting tourists; at the same time, locals have a better understanding of the environment.</p>	<p>1. The number of international repeat visitors is still low.</p> <p>2. Length of stay of tourists is short (2-3 days).</p> <p>3. Other than temples, tourism products in Siem Reap are not yet diverse and attractive.</p> <p>4. The spread of some negative images of tourist destinations in Siem Reap, especially on social media.</p> <p>5. Declining in competition due to some products and services being more expensive and not being convenient and flexible to the needs of customers.</p> <p>6. Facilitation of travel and tourism transportation is not convenient enough.</p> <p>7. There are no long-haul direct flights and Siem Reap destination is just a part of a package tour that connects with neighboring countries.</p>

<p>4. Siem Reap is located in a favorable geographical location, where it has both tangible and intangible cultural resources and natural resources, and is widely connected by land, water, and air.</p> <p>5. Siem Reap and the surrounding area contains the World Heritage assets as attractive tourist destinations</p> <p>6. The issuance of Visa-on-arrival and the arrangement of E-Visa applications have facilitated the entry of tourists into Cambodia through all international gates.</p> <p>7. The Siem Reap-Angkor region has the support of the Government (national and provincial), private sector, development partners, and organizations such as UNESCO, ICC, NGOs, etc. for developing and conserving the World Heritage sites.</p>	<p>8. Infrastructure in Siem Reap needs to be improved.</p> <p>9. Lack of information and signs.</p> <p>10. The promotion of tourism to the international market is still limited (not targeted, not innovative enough, and not in line with the evolution of technology).</p> <p>11. Lack of all annual mega national and international events.</p> <p>12. Lack of infrastructure and ecosystem for Smart tourism development at priority tourist destinations.</p> <p>13. The risk of shrinking some of the major tourism market sources to Siem Reap and the decline of the outbound tourism market sources (Chinese and Korean, ...).</p> <p>14. Competition on tourism is getting more intensified in the region and the world during and post Covid-19 crisis.</p> <p>15. Participation, facilitation, and co-operation between stakeholders are limited.</p>
Opportunities	Threats
<p>1. There are opportunities to capture major market sources in the region as well as long-distance markets through better connectivity.</p>	<p>1. Uncertainty of the global geopolitical and economic situation, especially the effects of the trade war between superpower countries.</p> <p>2. Outbreaks, natural disasters (floods, wildfires, etc.) and other crises.</p>

2. The increase of the domestic tourism market due to better living standards and higher incomes of Cambodians.	3. Climate change.
3. Siem Reap city, the city of cultural and historical heritage, has been rapidly developing and recently been targeted by the Government for development as a “Smart City”.	

(Source: adopted from the document of the International Coordination Committee for the Safeguarding and Development of the Historical Site of Angkor).

Part 2: Analysis of development scenarios for Siem Reap tourism

Based on the analysis of Siem Reap tourism at the current stage, the master plan sets the quantitative goals and qualitative goals as follows:

1. Quantitative goal analysis

Quantitative goal analysis for the forecast for 2035 focuses on **3 key indicators**: **1).** Number of tourists visiting Siem Reap and the length of stay, **2).** The impacts of tourism on the socio-economy in Siem Reap, **3).** Hospitality capacity in 2035 (capacity of accommodation services, and capacity of airport).

1.1. Domestic and international tourist arrivals forecast

Based on the pace or speed of tourism development in Siem Reap with the implementation of the Tourism Development Master Plan Siem Reap 2021-2035, the number of domestic and international tourist arrivals can be expected to increase in the future. In this case, the domestic and international tourist arrivals forecast in Siem Reap 2021-2035 can be made in **2 scenarios** as follows:

1- Scenario 1: Based on the trend analysis, Siem Reap captures Mass Tourism. In this matter, the development of tourism in Siem Reap does not have a thorough management mechanism, making an additional burden on the Angkor heritage site or other tourist destinations, which will lead to damage, loss of value, and Siem Reap will attract only economical tourists who spend little.

2- Scenario 2: Based on the intervention of the Government (through the implementation of the Tourism Development Master Plan Siem Reap 2021-2035 and other support policies) to ensure the sustainability of the environment and socio-economy, Siem Reap captures **Alternative Tourism**¹. In this case, Siem Reap has thoughtful management on tourism development and has orientation towards development of quality tourist sites or destinations, attracting quality or up-market tourists to mitigate negative impacts on the Angkor heritage site as well as cultural assets and natural resources.

The abovementioned 2 scenarios are evaluated, with the projection method focusing on key hypotheses (as shown in Table 1 in Appendix), in **3 stages**: short-term (2021-2023), medium-term (2024-2030), and long-term (2030-2035).

According to the forecast (as shown in Table 2 in Appendix), the 2 distinct scenarios expect that Siem Reap tourism can return to the same situation as in 2019, by which there will be about **2 million domestic tourists by 2023** and **2.2 million international tourists by 2025**. While, from 2026 to 2035, the number of tourist arrivals is expected to increase differently according to each scenario: **Scenario 1**, by **2035**, there will be about **6.6 million** domestic and **4.2 million** international tourists; **Scenario 2**, by **2035**, about **10.9 million** domestic and **7.5 million** international tourists (as shown in Figure 2 in Appendix).

1.2. Evaluation of tourism impacts on socio-economy

Tourism is the socio-economic sector. Indeed, in 2019, Cambodia's tourism contributed **12.1% of GDP** by generating **USD 4,919 million** in revenue and creating about **630,000** direct jobs. Siem Reap is the most important tourist province for Cambodia, and it reflects the strong impacts of the tourism sector on the socio-economic development of the country in general.

¹ **Alternative Tourism** is a form of tourism oriented towards development based on the arrangement of **quality tourist sites or destinations to attract quality or up-market tourists**.

- **Quality tourist destinations** are destinations or sites stand quality products and services that offer good memories and experiences to tourists and where there is enough supporting infrastructure.
- **Quality or up-market tourists** are both individual or group tourists who spend a lot, stay long and tend to visit more often. Additionally, this type of tourist tends to involve in the conservation of cultural and natural resources and the protection of environment in destinations they visit.

The tourism impacts on socio-economy in Siem Reap emphasizes the analysis of the actual expenditure of domestic and international tourists visiting Siem Reap, for example, how much they spend? How will the expenditure increase local consumption and value-added (incomes) and employment rate?

The study of total tourist expenditure is the key linked to generate tourism revenues to Siem Reap's economy (GDP). In particular, the master plan also analyses the impacts of tourism on socio-economy in Siem Reap by 2035, which is one of the key elements in setting the vision of “**Siem Reap as a quality tourist destination**”.

The following sections describe the basis analysis of “**Socio-economic impacts of tourism in Siem Reap**” drawn from direct and indirect expenditures of domestic and international tourists. It should also be noted that this analysis does not take into account the indirect effects of capital investment and public funding on tourism.

1.3. Socio-economic impacts of tourism in Siem Reap

- International tourists

In 2019, the total number of international tourist arrivals in Siem Reap was **2,205,697**, generating around **USD 1,186 million** total expenditures (according to the survey, one international tourist spent about USD 585 per trip). From the survey with tourism operators, **about 30%** of the international tourist expenditures (**USD 356 million**) spilled over to outside Siem Reap through costs and value-added in terms of profits and other factors, while **70%** of these expenditures (**USD 830 million**) had a direct positive impact on the Siem Reap's economy. In addition, the tourism sector also provided indirect socio-economic benefits to other sectors in Siem Reap.

The international tourist expenditures injected into Siem Reap's economy for **USD 830 million** (of which **USD 465 million** was the local costs and **USD 365 million** was the value-added), and stimulated additional indirect expenditures accounting for about **USD 1,162 million**, which generated about **USD 332 million** as an additional indirect value-added. These international tourist expenditures created about **138,000** direct and **110,000** indirect jobs (as shown in Figure 3 in Appendix).

- Domestic tourists

In 2019, the total number of domestic tourist arrivals in Siem Reap was **2,056,609**, generating around **USD 165 million** total expenditures (according to the survey, one domestic tourist spent USD 80 per trip on average). The domestic tourist expenditures injected into Siem Reap's economy for about **USD 115 million**, of which **USD 64 million** was direct expenses and **USD 51 million** was direct value-added. The expenditures stimulated additional indirect spending accounting for about **USD 161 million**, and about **USD 46 million** as an additional indirect value-added. These expenditures created about **128,000** direct and **103,000** indirect jobs (as shown in Figure 4 in Appendix).

Overall, in 2019, with the total of **4.26 million** tourist arrivals, the tourism sector provided socio-economic benefits by generating revenues into the province's economy (GDP) accounting for about **USD 794 million** and creating about **60% of total employment** in Siem Reap (as detailed in Table 3 in Appendix).

In particular, for the forecast towards **2035**, the impacts of tourism on Siem Reap's socio-economy can be examined and compared based on the abovementioned 2 scenarios (as shown in Table 4 in Appendix) to demonstrate options for setting the Tourism Development Master Plan Siem Reap to achieve the defined goals and vision. As a result, if there are a good implementation and introduction of the master plan (Scenario 2), by 2035, Siem Reap will be able to welcome **18.4 million** tourists (of which **7.5 million** are international and **10.9 million** are domestic tourists), and the tourism sector will generate about **USD 5,916 million** revenues to Siem Reap's economy (GDP), and create a total of **1.6 million** jobs, of which **940,000** are direct jobs in the tourism sector.

1.4. Forecast on Siem Reap's hospitality capacity

Siem Reap needs to take into account the carrying capacity of accommodation services and airports to respond to the future growth of the number of tourists.

- The carrying capacity of accommodation services

Tourists' demand for accommodation changes seasonally; especially for international tourists, the demand is low during the 2nd and 3rd quarters, while high

during the 1st and 4th quarters. Whereas, the demand for domestic and internal tourists is high during national festivals or other important events. In 2019, the total demand for accommodation was about **15,965 rooms (13,192 hotel rooms and 2,773 guesthouse rooms)**; the demand for tourist accommodation in 2020 declined significantly due to the severe effects of the Covid-19. However, when the tourism sector in Siem Reap recovers, tourists will return and may reach the same level as in 2018 or 2019. By 2025, it takes 5 years to recover where the demand for hotel rooms and guesthouse rooms will also increase. In the case that the implementation of the master plan can attract more tourists to Siem Reap as predicted in Scenario 2, the demand for accommodation as well as investment in accommodation will increase more than previous years. By 2035, Siem Reap will need around **70,000 rooms** (of hotel and guesthouse), of which **58,517** are hotel rooms and **14,677** are guesthouse rooms (to accommodate up-market tourists, it requires around **40,000 rooms** of 4- and 5-star hotels in Siem Reap) (as shown in Table 5 and Table 6 in Appendix).

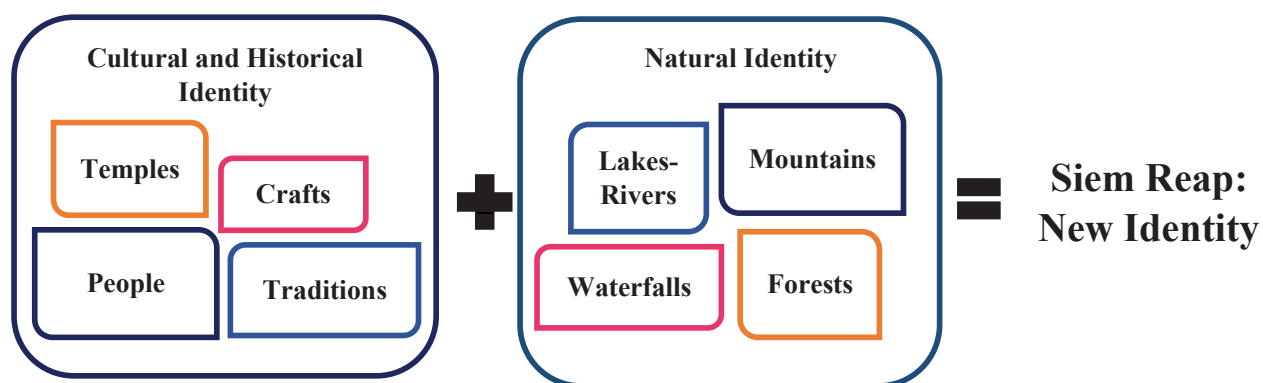
- The carrying capacity of the airport

In addition to the capacity of accommodation, the carrying capacity of the airport also plays a significant role in ensuring the growth of domestic and international tourists. Currently, Siem Reap International Airport is able to accommodate only 5 million passengers. Meanwhile, a new airport project, called “**Siem Reap-Angkor International Airport**” has been putting under construction in **4 phases**, in which it can accommodate **5 million** passengers annually in the first phase, **7 million** in the second phase, **10.5 million** in the third phase, and **more than 20 million** in the fourth phase.

2. Qualitative analysis

In order for Siem Reap to become the world-class and high-quality tourist destination, the qualitative analysis sets out **a new identity** for Siem Reap as “**Siem Reap: Beyond Temples**” by connecting between cultural resources, historical resources (temples, crafts, people, traditions) and natural resources (forests, mountains, lakes, rivers, waterfalls, ...) to promote the international recognition as “**Siem Reap, the cultural and natural tourist destination**”.

A new identity of Siem Reap tourism



2.1. New cultural identity

The new cultural identity of Siem Reap tourist destination, besides temples, is diversification of cultural, historical and religious tourism products through the creation of new tourism events along with a presentation of livelihood of the locals as a source of living culture linked to the Siem Reap's culture and history.

2.2 New natural identity

The new natural identity of Siem Reap is a consideration on diversification of natural tourism products (forests, mountains, rivers, lakes, waterfalls, ...) associated with supply of green tourism products, environmental-friendly living, clean city development, community-based tourism and ecotourism, and so on in Siem Reap.

In conclusion, the RGC will choose Scenario 2 because it is more appropriate in terms of socio-economic benefits. This Scenario will make Siem Reap successful in attracting more up-market tourists, extending tourists' length of stay, creating more quality jobs, providing higher socio-economic benefits, and contributing to the conservation of cultural and natural heritage assets, especially the Angkor Heritage site, with the outstanding universal value.

Chapter 2

Siem Reap Tourism Development Strategy 2021-2035

Part 1: Strategy for Developing Priority Tourism Zones

Part 2: Strategy for Developing New Tourism Products

Part 3: Strategy for Promoting Tourism and Attracting Tourist

**Part 4: Strategy for Strengthening Quality and Sustainability of Tourism
Development**

Part 5: Strategy for Managing Environment

**Part 6: Strategy for Developing Infrastructure and Enhancing Tourism
Support Connectivity**

Chapter 2: Siem Reap Tourism Development Strategy 2021-2035

Part 1: Strategy for Developing Priority Tourism Zones

To achieve the vision of tourism development in Siem Reap 2021-2035, the master plan sets out recommendations for the establishment and development of **06 priority tourism zones**: **1).** Jayavarman-Norodom “Phnom Kulen” National Park, **2).** Banteay Srey protected area’s surroundings, **3).** Angkor Heritage site, **4).** Siem Reap city, **5).** Tonle Sap Lake area, and **6.)** New Siem Reap (as shown in Figure 5 in Appendix).

Besides cultural heritage, natural heritage will also play a key role in supporting the development of sustainable and highly competitive tourism, and the master plan will promote the development of this type of tourism in Siem Reap, including natural tourism, ecotourism, adventure tourism, etc. This type of tourism activity exists in many tourist destinations, such as natural tourism villages and street natural landscapes, but it also requires standards for development in those areas. Development of natural and ecotourism sites can be located in northern (Phnom Kulen National Park) and southern (Tonle Sap Lake) areas of Siem Reap, as well as rural areas that can leverage the potential of natural resources to develop new tourist destinations in response to the growth of tourists’ demand.

1. Jayavarman-Norodom “Phnom Kulen” National Park Zone

Jayavarman-Norodom “Phnom Kulen” National Park, also known as “**Phnom Kulen National Park**”, is a protected natural area established by the Royal Decree in 1993, which includes Phnom Kulen, Phnom Hob, and Phnom Kbal Spean, and covers a total area of 37,500 hectares. “**Phnom Kulen**” is recognized by researchers as an important source of water that contributed to the birth of the Angkorian Civilization and continued to have a famous influence in the region since the 9th century. In addition, in accordance with the Guidelines for the implementation of the 1972 Convention, the RGC has included Phnom Kulen (Mahendraparvata) on the reserve list to be inscribed on the World Heritage List in line with the 2nd, 4th and 5th Criteria under the form of cultural heritage. Moreover, Phnom Kulen is considered to have a high conservation value based on 03 main aspects: **important ecological conditions, ecosystem services,**

and **social functions**. The forest cover in the area is mostly dense forest, semi-dense forest, and consists of small parts of brushwood. In terms of forests, the National Park is a potential area for its remaining forests and important tree species such as Kranhung, Beng, and Chham Chha. Apart from tree species, there are many other animal species that depend on the forests in Phnom Kulen National Park. This area is also an important and highly valuable cultural and historical heritage site for the nation, where remains rich cultural assets that are located in many places, such as ancient temples, Poengs, sculptures, river basins, elephant pond, Phrea Ang Thom, pottery, Baray dam, and other traces of important structures. In this list of archeological sites in the Phnom Kulen National Park, 155 archeological sites have been found.

Phnom Kulen is a source of water for Siem Reap province and especially Siem Reap city; Phnom Kulen provides not only consumable water, but also precious water called **sacred water**, which is a belief that is still practiced to this day for major religious ceremonies. Today, Cambodians and tourists who practice Buddhism and Hinduism continue to worship on the mountain and bath from Phnom Kulen.

The RGC and the ICC-Angkor consider this archeological site as an inseparable part of the Angkor Heritage site, and tourism development must be careful and adhere to the standards of the conservation of natural resources and heritage. Therefore, development of tourism is necessary and is a solution for the conservation of this potential natural zone, because this development will provide economic and social benefits (e.g., increase and strengthen capacity) from the forests and heritage that locals must jointly protect in order to continuously take advantages. All tourism and economic development must adhere to the **3 principles** of the area's spirit: **1). Economic and social benefits to the local people** by maintaining their traditional way of life, beliefs and lifestyles, **2). Forests and environment to be preserved**, and **3). Sanctity**: The National Park's historical and archeological features.

Table 2.1. SWOT Analysis of the Phnom Kulen National Park

Strengths	Weaknesses
1. Phnom Kulen has great potential as a rich natural tourist destination.	1. Lack of food and beverage services strengthening.

2. Consists of cultural heritage. 3. Is a historical site and important water source. 4. Has attractiveness for up-market tourists. 5. Is considered as a premium and sacred place. 6. Phnom Kulen is an abundant source of water. 7. Is potential for an adventure tourism setting. 8. Has a good forest ecosystem that is an important habitat for many rare animal species. 9. Phnom Kulen National Park has been rated as one of the most attractive sites in Siem Reap by TripAdvisor.	2. Inadequate toilets. 3. Poor internet services. 4. Poor infrastructure. 5. Environmental and waste management is limited. 6. Local people's awareness of heritage and the environment is limited. 7. Some wrongful actions have caused damage, deterioration, and loss of natural resources. 8. Number of tourist arrivals is low. 9. Lack of funds for the Phnom Kulen National Park's conservation and development.
Opportunities	Threats
1. The development in Siem Reap province will contribute to development and conservation of the National Park. 2. Is a cultural and natural tourist destination as well as a research destination.	1. If Phnom Kulen National Park is not strictly managed, it will be threatened by illegal logging. Deforestation will not only affect biodiversity and locals' livelihood, but also cause water shortages in the dry season for the entire Siem Reap province.

(Source: adopted from document of the Ministry of Environment)

The following is a strategy for the development of Phnom Kulen National Park to become a faith, religious, natural, adventurous, and research destination that is qualified to host both domestic and international visitors:

1.1. The development of religious tourism and faith tourism

Religious tourism and faith tourism are types of tourism that have existed for a long time and continued to grow until today. This type of tourism increases the frequency of visitation of up-market tourists, and this is what Siem Reap destination needs. Basically, the used database depended on an estimation of the Ministry of Tourism's survey in 2019, which showed that 12% of international tourist arrivals in Siem Reap visited Phnom Kulen. Organizing religious and faith tourism shall follow the following actions:

- Action 1: Creating Ashram and meditation centers

Ashram and meditation centers can be built in front of the 1000 Lingas Square or at a suitable place near the Phum Chas, with lightweight construction tools adopting Khmer style and using renewable energy for the religious and faith tourism activities in Phnom Kulen National Park.

- Action 2: Organizing yearly religious events

In the Buddhist calendar, there are many annual ceremonies, including Pisak Bochea, Khmer New Year, Buddhist ordination ceremony, Vassa, and so on, that Phnom Kulen National Park management team can cooperate with the private sector to organize as annual events. All such events shall be advertised to target customers. There shall be cooperation with the private sector for such events, from the study and consultations have shown that the private sector supports and intends to participate in the development of these events. The arrangement can be made by renting any of the premises of Phnom Kulen National Park, which is specified in the charge book about allowed locations and rental price. The organizers already have a team member and do not need to do large-scale advertising. Using protected areas must be highly responsible by comprehensively taking the natural and cultural heritage into account.

1.2. The development of natural tourism and ecotourism

Natural tourism is a kind of alternative tourism that is still small in terms of market share but gradually growing year by year. Natural tourism is a type of tourism which main purpose is to explore and enjoy nature. There are two different levels of natural tourism; one is soft natural tourism that tourists want to relax, enjoy nature, consume foods and be physically passive. Whereas, for hard natural tourism, tourists not only enjoy nature but also take part in environmental protection activities and

learning about the ecosystem. Visitors can be group tours organized by tour operators or individual small groups. To respond to demand and to attract tourists, the following actions shall be implemented:

- Action 1: Developing and managing Tek Tlak Thom

Tek Tlak Thom is a destination that attracts around 90% of domestic tourists to enjoy the waterfall, swim in, take photos, and eat around the area, and it is considered to be one of the most important sites. To strengthen the management, consideration shall be on: **1).** There is an ancient temple near Tek Tlak Thom, and although it is now in ruins, the site shall be protected and food vendors must be banned from that site. Food vendors can only sell at the allowed stall area. **2.)** Access paths and stairs to Tek Tlak Thom shall be repaired and restored to provide safety and convenience to all visitors including children, adults and elders.

In 2018, the RGC provided funding through the APSARA Authority to build a new concrete road that connects the Phnom Kulen to other heritage sites in the east and south of the Park. This new main road makes the accessibility to many archeological sites, temples and Poeng easier. This new road allows drivers to go up and down at the same time without having to wait until the afternoon to get back down. At the same time, old roads shall be repaired to make it more convenient, as well as a regular maintenance plan for existing roads shall be set.

- Action 2: Strengthening local communities at Phnom Kulen

To ensure the conservation of natural and cultural resources, and benefits to local communities, it necessitates to strengthen the role, participation and responsibility of local communities to become community-based ecotourism in order to contribute to the promotion of environmental protection, sustainable natural management, and to promote sustainable livelihoods, with the diversification of economic and tourism activities in each community.

- Action 3: Establishing tourist park

Nomadic plantation and cutting down forest trees to plant cashew are the current major challenges at Phnom Kulen. Reforestation requires participation of local communities by making the locals aware of the importance of the environment and ecosystem, and receive socio-economic benefits from protecting the natural heritage.

“**One Tourist, One Tree**” campaign is an operation to increase the reforestation of Phnom Kulen’s trees, such as Kranhung, Beng and Chham Chha. By maintaining the tourist park, local people will be employed as guards and gardeners from the tourism communities under this natural tourism development framework. The expected outcome is to stop deforestation and farming activities in these protected areas.

1.3. The development of natural tourism and adventure tourism

Adventure tourism is catering for tourists who wish to explore new things in both natural and cultural settings in isolated areas or can be in rural areas without any plans. To simply put, this type of tourism can be for natural and cultural purposes that takes place where mass tourism does not exist, and it is for dynamic visitors. At Phnom Kulen, the development of this type of tourism can be made by combining activities such as trekking, visiting temple and Poeng located in deep forest, and camping. The trip can last over 1 day by using many trekking routes or can be done by biking. Adventure tourism can include thrilling activities such as zipline riding on the mountain. The development of adventure tourism shall follow the following actions:

- Action 1: Creating trekking for adventure tourism development

Adventure tourism through trekking is considered to be one of the tourism types that contributes to natural protection and provides benefits to communities when there is thoughtful management. Designing adventure trails on different themes such as cultural trails, historical trails in the forest etc., can prolong the length of stay of visitors at the mountain. For instance, the establishment of the Mahendraparvata heritage adventure tour can take 3 days and 2 nights partly on foot and partly on bike and motorbike. In this adventure tour, tourists have to walk pass archeological sites, spring water, caves, important monuments and Poeng, and there is also an arrangement to villages and communities.

In addition, access roads to the archeological sites, Poeng, other main tourist sites are badly damaged and need to be repaired and regularly maintained to make it more convenient for tourists to visit those areas.

- Action 2: Creating high altitude recreational activities

Phnom Kulen National Park has the potential for developing sports tourism linking with nature, especially zipline activities. For this tourism product, there are **2 possible activities** that can be created: **1). Rope mobile and 2). High zipline riding**. To ensure the sustainability of the environment, nature and heritage at Phnom Kulen National Park, the design of this product requires thorough studies by taking into account visitors' safety, heritage and all impacts.

1.4. The development of research and science tourist destination

Phnom Kulen National Park is an area full of scientific values that need to be further enhanced. Recognizing this importance, the RGC decided to establish the **Samdech Vibol Panha Sok An Phnom Kulen Orchid Research and Conservation Center** in 2018 in order to promote the research and conservation of Orchid, educate and disseminate the value of Orchid blossoms, and attract visitors, aiming to ensure the effectiveness of the management in protected areas as well as improve local communities' livelihoods. This center will provide number of benefits such as preserving and rehabilitating local orchid, collecting living orchid samples, recording and inventorying as a place for researchers to practice, providing knowledge and scientific information to future generations, harmonizing human-nature relations, improving local livelihoods, gaining knowledge, skills and experiences from national and international experts, raising funds, materials and specialty in natural management. This center will be a new natural tourism product taken part in field trips in addition to cultural heritage tourism products.

1.5. The improvement of the quality of tourism services in Phnom Kulen National Park

In order to increase the visitor's trust and ensure the quality of services provided, it is necessary to strengthen the quality of tourism services in Phnom Kulen National Park by implementing the following actions:

- Action 1: Creating convenient and safe means of transport

In order to create options for individual tourists to travel safely and conveniently, there should be feasibility study on creating funicular railways for Phnom Kulen, which

the project will turn “**Phnom Kulen into a natural and quality tourist destination**”, and supports the implementation of the goals set out in the Tourism Development Master Plan Siem Reap by **transforming Phnom Kulen from an alternative tourist destination into the main destination after the Angkor Wat Temple**. Today, modern technology can create energy-saving funicular railways that partly use electricity power and partly renewable energy. Due to the large amount of archeological remains in the ground in the Phnom Kulen area, all construction projects must comply with archeological principles and must be excavated in advance.

- **Action 2: Strengthening environmental awareness**

Since Phnom Kulen is the National Park, it is important to consider further promoting environmental awareness to local communities and villagers on Phnom Kulen by working with local schools and pagodas. Teachers can influence the next generations in schools, and those children can bring the messages to their families. Monks have a significant spiritual influence on the community, so it can have an immediate impact on the adults in their community. In this matter, the “**Clean City, Clean Resort, Good Service, Best Hospitality**” shall be actively and effectively implemented in this tourist site.

- **Action 3: Strengthening the responsibilities of investors and tourism operators**

Sustainable development in Phnom Kulen National Park requires the participation of tourism operators and investors, who must adhere to the principles of the “**Corporate Social Responsibility**”, which is in line with the charge book. All development of tourism facilities in Phnom Kulen National Park shall comply with the quality standards. For instance, **1). Charge book for religious event organizing:** prepare charge book for setting available locations for events, location rental fee, and transparent implement conditions. **2). Charge book for homestay establishments:** arrangement of either community or private homestay shall comply with the Cambodia Homestay Standard and Asean Homestay Standard defined in the charge book.

All tourism operators who run business in Phnom Kulen National Park shall be outstanding operators with environmental and social achievements, and shall achieve labels certifying Green quality standards in the tourism industry.

- **Action 4: Strengthening effectiveness of tourism information**

To make it is more convenient to provide information to tourists in terms of history, archeology, ecology, nature, environment, standards, locations, and access roads to major archeological sites and Poengs, it is necessary to establish an information and exhibition center at the entrance of ticket counter that allows visitors to seek information and understand about Phnom Kulen before their visitation, especially can facilitate travel arrangement for individual tourists. **This information and exhibition center** is also a place to present the ecosystem of the mountain itself such as tree species, animal species, history and current of cultivation, as well as to provide lectures on ecology to pre-booked tours. At the same time, in order to increase the effectiveness of the provision of information, it is necessary to establish tourist guides at Phnom Kulen National Park. In particular, in the digital era, this center will need to use modern technology as supporting tools, such as artificial intelligence, virtual reality (VR), augmented reality (AR), and the use of online maps and so on.

Meanwhile, there shall be signposts since trekking is by some means independent, which means that some visitors do not need a tour guide, so it is important to study and install signposts and direction signs. The installation of road signs for walking, biking and riding to the mountain, and direction signs is considered as a priority and shall be set thoroughly so that tourists can travel with or without a tour guide.

1.6. Management and development mechanism in Phnom Kulen National Park

To manage and develop tourism in the Phnom Kulen National Park, the master plan sets out the establishment of “**Destination Management Organization**”, which takes part in developing and managing tourism in the Park. This separate unit is under the form of multi-stakeholders of public-private partnership or people-public-private-development partner partnership. All relations between investors, tourism operators, and

Destination Management Organizations in Phnom Kulen shall be done under contract and clear charge book, with equitable benefits sharing.

2. Banteay Srey protected area's surroundings

Banteay Srey is located on the National Road No. 67, 20 km northeast of Angkor heritage site, 30 km from Siem Reap town, and near Phnom Kulen National Park. This area is potential for development of rural tourism and agro-tourism that respond to new trends of the **sustainable tourism** demand. The selection of Banteay Srey as a priority area for the development of “**rural tourism and agro-tourism**” is based on the socio-economic and cultural aspects of the area, where the majority of the population engages in agricultural activities (in particular growing vegetables, fruits, and raising livestock) that serve in tourism sector. The following is SWOT analysis of tourism development in Banteay Srey district:

Table 2.2. SWOT Analysis of Tourism Development in Banteay Srey

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. The geographical location is favorable due to its proximity to Siem Reap city. 2. There is connectivity infrastructure. 3. There are many local well-known tourist destinations such as Phum Preah Dak, Phum Banteay Srey, Phum Khna Rongveas, Banteay Samre Temple, Banteay Srey Temple, Phnum Boak, Kbal Spean resort where a 1000-lingas river is located, and so on. 4. Run Ta Ek natural village and ceramic museum in Run Ta Ek commune. 5. Natural resources such as Ta Nieu lake/reservoir (at Phrea Dak), Chambaok Thom dam (at Khan Sandai), forest 	<ol style="list-style-type: none"> 1. Poor services and supporting infrastructure. 2. Product outlets are not well organized. 3. Professional skills are still limited.

<p>community, palm trees, sand, red volcanic soils, and on.</p> <p>6. Large farms such as dragon fruit farms, melon farms, orange farms, watermelon farms, livestock farms, and on.</p> <p>7. An international qualified water factory (at East Tbeng village).</p> <p>8. Silk weaving center.</p> <p>9. Mine museum (at Khna village) that displays post-war unexploded ordnance.</p>	
Opportunities	Threats
<p>1. Increasing number of domestic and international tourist visiting Siem Reap</p> <p>2. Government strategy to create new tourist destinations in this area</p> <p>3. Emerging trends of international tourists who seek for rural tourism and agro-tourism</p>	<p>1. If the tourism development does not follow the sustainable principles, there will be negative impacts</p> <p>2. If tourists are not responsible tourists, this will make tourism without quality.</p>

Based on the above SWOT analysis, the master plan has set strategic direction to 1). Transforming this area into a new and attractive tourist site in Siem Reap; 2). Creating economic benefit from existing resources; and 3). Defining Banteay Srey tourism development mechanism.

To achieve this strategic direction, improving agricultural products serving for tourism sector is needed, arrange the selling space and empowering the tourism communities are important. Promoting stakeholder cooperation is necessary by involving public, private, civil society and development agencies to improve investment capability and develop the rural area to serve tourism sector. In this regard, **three strategies** are developed:

2.1. The development of Banteay Srey area to make it a new and attractive destination for Siem Reap

Because Banteay Srey is a tourist transit route, this area should take advantage from the tourist flow. Every tourist attraction has connection with agriculture. Therefore, combining these two products provides good opportunities tourist circuit (Agro-tourism and rural tourism) which are popular for Europe, Japanese and Korean. For example, tourists can visit and taste agricultural products and non-timber products without chemical.

Khmer culture is well reserved in this area. The local community such as forest community and agriculture community have a strong will to participate in the local tourism development. In addition to agriculture activities and livestock raising, tourism provides them alternative income. Tourism activities that use of local culture can be easily developed and the tourism development will improve the local infrastructure such as trail, road, clean water and electricity. The idea to make Banteay Srey area a new destination is to: **1).** Improve the attractiveness that makes tourists stay longer and **2).** Strengthen local livelihood through tourism economic activities. The main purpose is to develop the Banteay Srey area into an attractive tourist destination which allows tourists to deeply understand about the area by connecting with local culture, tradition, food and knowledge. To achieve this strategy, the following actions need to be taken into account:

- **Action 1: Improving the attractiveness of Banteay Srey temple by connecting it with the surrounding area**

Banteay Srey is one of the most beautiful temples within the Angkor heritage site and the name of the district is followed by the temple name. Banteay Srey offers many other tourist attractions beyond the temples, which provide tourists new experiences. Homestay and craft experience is being improved so that tourists will stay longer and it improves local living standards.

In this regard, there is a need to improve Banteay Srey as a main tourist destination by connecting with other surrounding areas: **1).** Creating Banteay Srey tourist circuit because Banteay Srey existed in the tourism map with a lot of activities. Therefore, it is very easy to promote and develop additional tourist routes by connecting

temples and various tourism activities (rural tourism, agro-tourism, gastronomy, cycling and other leisure activities); **2).** Improving human resource and service quality in each tourist circuit connecting to Banteay Srey temple; and **3).** Setting Banteay Srey temple to be a core of Banteay Srey Tourism promotion.

- Action 2: Improving Eco-village project and promoting Run Ta Ek

Run Ta Ek eco-village project was first established in 2004 covers land area of 1012 hectares outside the east protected area in Run Ta Ek commune, Banteay Srey district, Siem Reap. Based on sub-decree No 69 ANK.BK dated on 19 October 2004 on the establishment of “**Run Ta Ek Development Site**” in order to: 1). Raising local living standards including social, economic and culture; 2). Enabling the local to improve their livelihood by raising new ideas and activities that align with nature as well as the economic and social improvement simultaneously; 3). Improving the natural resources with various activities that depend on natural resources attributed to the new location such as water, forest and every agricultural activity; 4). Giving the direction of economic activities toward the sustainable use of natural resources by producing safe agriculture products (rice, crop, vegetable, fruit and animal meat.), creating handicraft made from forest products such as (timber, bamboo, rattan, palm leaves, etc. creating natural based tourism based on local talent, culture, art and creating a visiting sequence to Run Ta Ek by walking or cycling, etc.; and 5). Improving human resources in all sectors depends on the local’s needs such as bicycle, motorcycle, radio, television fixing and other household items and daily utilities.

Based on the above principle, tourism is known to be an effective tool in providing additional incomes to the local and takes part in poverty alleviation. Tourist activities developed in the Run Ta Ek area must be based on its uniqueness.

- Action 3: Feasibility study on developing Phnom Kulen roundabout (Banteay Srey District) to be an urban tourism

Phnom Kulen roundabout located in Tbeng commune, Banteay Srey district, Siem Reap Province is a conjunction of: **1).** A street connecting from street No.67 Banteay Srey market; **2).** Street No.66 toward Anlong Veng district Oddor Meanchey province; **3).** Street No.66 toward street No.6 Bakong District; and **4).** A Street toward

Kulen National Park. Currently, Kulen roundabout has a big diameter of 185m and the surrounding farming area is quiet. This location is suitable for developing urban tourism connecting with other tourism sites in Siem Reap such as Phnom Kulen National Park, major tourism sites in Banteay Srey District and in Siem Reap city.

- **Action 4: Improving quality and promoting Banteay Srey tourism package**

Banteay Srey area has a great tourism potential that can offer choices to domestic and international tourists. Currently there are 4 travel itineraries: **1).** Heart of Banteay Srey district; **2).** Livelihood in Banteay Srey area; **3).** Banteay Srey natural site; and **4).** Learning about the Banteay Srey area.

To promote and make these travel itineraries successful, there is a need to consider on providing necessary **supporting infrastructures** by developing cycling trail and cyclist zone, installing direction signs, improving environment management “**Clean and Green**” by strengthening waste management and installing rubbish bins, establishing enough toilets, holding workshop and making environmental campaign, creating “**Clean Banteay Srey Campaign**”, providing technical assistance on organic agriculture, **developing educational farm** as well as **practicing good agriculture**. It is also important to boost **Banteay Srey tourist destination promotion** by creating a logo for the area using specific sign/image, creating leaflet, developing webpage and mobile app promotion.

2.2. Improving the Value of Natural Resources and Maximize the Economic Benefits Through Tourism

To gain benefits from tourism for the local economy and the people in Banteay Srey area through linking tourism with agricultural products and handicraft, the following actions need to be undertaken:

- **Action 1: Boosting and promoting green belt in Banteay Srey area**

The development of Banteay Srey area must take into consideration agricultural products, especially local organic products, that supply the hotel and restaurant demand. To create opportunities in supplying agricultural products to hotels and restaurants in

Siem Reap, the creation of the **“Green Belt”** project is needed. Green belt program provides local technical support so that they can increase their productivity. Examples of agricultural technical support include training the locals to create and use compost waste to fertilize their crop land and minimize the use of chemical pesticide and train them on cropping techniques.

To increase interaction between tourism and agriculture, it is important to create partnership cooperation that allows local communities to supply agricultural products to hotels and restaurants with the agreed quantity, quality and price and this needs to take into account the tourism seasonality. Identities of these supplied products should be certified that **“the origin source is monitored”** and it must follow good agriculture principles.

- **Action 2: Promoting and developing creative industry in Banteay Srey area**

The development of the creative industry in the Banteay Srey area refers to boosting and promoting handicraft and gastronomy tourism: **1).** Developing gastronomy tourism can effectively create income to support local livelihood when productivity is increasing and quality is recognized; **2).** Handicraft village visit: visiting the handicraft village, tourists can enjoy the handicraft display, involve in the production activities and purchase them as souvenirs. Additionally, handicraft products and souvenirs and products of the creative industry can be supplied to markets in Siem Reap city and other destinations.

Therefore, to boost and promote the creative industry (especially handicraft and food) to be attractive and respond to the tourism market, there is a need to establish a training center, to improve vocational skills within the handicraft village, to create Banteay Srey handicraft label. Whereas, promoting Khmer food must follow Ministry of Tourism Gastronomy Tourism principles.

2.3. Management Mechanism and Tourism Development at Banteay Srey

To manage and develop the tourism in Banteay Srey area, the master plan requires to create the **“destination management organization” (DMO)** that will

become a developer and has a role to manage tourism in the area. **This DMO** is created under a public-private partnership form or community-public-private-development partnership.

All agreements between investors, tourism operators and the DMO must be made under **contract terms** and must **have a clear charge book** with fair benefit sharing guidelines.

3. Angkor Heritage Site

Angkor park located in Siem Reap is an important archeological site of Cambodia as well as Southeast Asia. Stretching on a land area of 401 square kilometers Angkor world heritage site is a home of big and small temples, irrigation system (Baray, reservoir and dam). The archeological plan of this ancient city and ancient road across the area includes beautiful culture landscapes, and reflects one of the prosperous and greatest cultures in the world. For centuries, Angkor has played an integral part in Khmer civilization. For example, Angkor Wat, Bayon, Preah Khan and Ta Promh are samples of unique Khmer architecture which were built by carefully considering the geography context, meaning and symbol in religion. With this unique achievement, Angkor is known to be a tourist site with value of culture, religion, symbol and the importance of architecture, archeology and art.

Angkor park is known as a living tourist site because people here and some are the descendants of the ancestors from the Angkor era who continue to practice culture, religion and agriculture activities especially growing rice.

Angkor Park has been listed in UNESCO World Heritage since 1992 based on the 4 outstanding criteria such as: **Criteria 1:** Angkor represents the whole of Khmer art from the 9th to 14th century and also includes the stunning artwork that cannot be denied (For example: Angkor Wat, Bayon, Banteay Srey); **Criteria 2:** The influence of Khmer art which is prosperous during the Angkor era is the marvelous art work that has a great impact on other areas in Southeast Asia and plays an important role to evolve itself; **Criteria 3:** The power of the Khmer empire from the 9th to 14th century has covered almost all the areas in Southeast Asia. It also plays a role to develop politics and culture

in the region by leaving the richness heritage of its culture structure which is built from brick and rock; **Criteria 4:** Most of Khmer architecture has evolved from India Polynesia and later on it created distinctive attributes when Khmer architect has developed its own special style. Some architect has evolved separately while some others take an influence from tradition and culture of the neighboring country. As a result, it creates a new scope of art from East Asia architecture and art.

Setting out tourism development activities in Angkor site, the impact on heritage must be taken into consideration in accordance with **heritage management principles**, national and international law by protecting the value of Angkor site as noted in the Royal decree No 001/ NS dated on May 8th 1994 concerning zoning and management of Siem Reap Angkor site based on 5 protection levels such as: **Zone 1:** Temple Site, **Zone 2:** Protected archeological site, **Zone 3:** Protected culture landscape, **Zone 4:** Archeological and historical site and **Zone 5:** Siem Reap-Angkor socio-economic and culture development site.

Tourism development action plan is put in place complying with national and international policy and law and legislation standards such as decree, sub-decree, national strategy, outstanding universal values (OUV), the previous management and development plan and recommendations from ICC-Angkor.

The purpose of Angkor tourism development is to ensure positive prospective experiences, reduce negative impact on the site, provide the local the opportunities, improve partnership with all stakeholders and prolong tourist's length of stay.

Table 2.3. Angkor Heritage Site SWOT Analysis

Strengths	Weaknesses
1). Siem Reap is a home of Angkor Wat, listed in the world heritage in 1992, with both natural and cultural potential, recreation sites such as town, Tonle Sap and Phnom Kulen.	1). Tourist flow management <ul style="list-style-type: none"> - Tourist statistic is not precise - There is no online ticket system that can help to manage tourist flow, collect specific data during

<p>2). It is a center of culture and religion full of tangible and intangible heritage.</p> <p>3). Angkor Wat is the world's biggest heritage with a population crossed (401 square meters), 113 villages, 91 visit-able temples, irrigation system (Baray, reservoir, lake) flora and fauna.</p> <p>4). APSARA authority is the only national level institution in Southeast Asia who is responsible for managing, conserving and developing the site.</p> <p>5). The international committee (ICC Angkor) consists of experts and national and international legislation.</p> <p>6). A site with precise management and development plan, Angkor code of conducts and temple guards.</p> <p>7). A well-known tourist attraction and tangible heritage site which become a catalyst for poverty reduction and GDP contribution.</p>	<p>the visit and offer a choice of circuit of visit.</p> <ul style="list-style-type: none"> - Tourism infrastructure and facilities haven't meet the demands yet - Number of visitor fluctuates by season - The promotion of existing tourism products has not been done largely, the tourism products lack a variety and do not meet a variety of demands. <p>2). Environment</p> <ul style="list-style-type: none"> - Street vendors, traffic congestion, pollution, and the lack of solid and liquid waste management are the factors affecting negatively on the heritage site and nature. <p>3). Governance</p> <ul style="list-style-type: none"> - Dialogue and cooperation with stakeholders are limited - Insufficient dissemination of information and education on heritage value - Limit human resources in tourism sector - Tourism economy depends largely on tourism, benefits from tourism for the local is limited.
Opportunities	Threats

1). Engagement from the private sector in tourism product diversification using tangible and intangible heritage to attract tourists and extend their length of stay. 2). National policy and strategy to develop Siem Reap into a cultural and natural tourist destination are in place. 3). The existence of the inter-ministerial committee for Siem Reap tourism development. 4). Siem Reap-Angkor is an internationally recognized tourist destination.	1). Law enforcement faces challenges (especially in the protected area) 2). Lack of communication and cooperation among different stakeholders 3). Inconsistency architectural style which affects negatively on town beauty. 4). Work towards common benefit is limited 5). Heritage management knowledge and understanding is limited
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(Source: APSARA Authority)

Based on the current tourism situation analysis and stakeholder consultation, **three strategies** are developed to manage demand and supply as present below:

3.1. Tourist flow management in the Angkor heritage site

To avoid congestion within and surround temple area, to reduce impact from visitation, to enhance site value and to manage tourists, the following practices are recommended:

- **Action 1: Improving tourist statistic understanding** through domestic and international visitor data collection using regular public observation to document tourist information.

- **Action 2: Developing tourism infrastructure and facilities to improve visiting experience through:** **1).** Developing a master plan and creating a charge book to identify and build necessary infrastructure and facilities (tourism information center, signage, rest area, and toilet); and **2).** Developing additional necessary facilities based on the study and the implementation of Angkor visit circuit.

- **Action 3: Studying type of tickets and site's carrying capacity through 1).** Identifying proper type of ticket for international tourists and online ticket to assist the

data collection management, to extend tourist's length of stay and promote the visit to small temples, to reduce tourist season; and **2).** Determine number of visitors, or visiting hours during peak time based on carrying capacity study.

- **Action 4: Promoting and enhancing site value** by **1).** Cooperating with relevant stakeholders and private institutions to conduct a study to develop yearly events; **2).** Promoting existing tourist activities and other attractions in Siem Reap-Angkor with the participation from marketing experts and tourism industry using a variety of promotional channels (E-marketing).

- **Action 5: Enhancing public order** by managing vendors and parking space complied with charge book of construction, management and operation procedures.

- **Action 6: Promoting programs that offer benefits to the locals** through: **1).** Boosting activities that support tourism (agriculture and handicraft) by creating standard and quality; And **2).** Offering skill training (agriculture, handicraft and tourism) and encouraging to have study tours across villages.

3.2. Protecting the Environment in the Angkor heritage site

To respond to climate change, protection of resources for the next generation will maintain the authenticity of the cultural site. The following action must be taken into consideration:

- **Action 1: Executing environmental protection policy** through: **1).** Strengthening the practice of the existing environmental protection measures; **2).** Educational campaign on environmental protection; and **3).** Conduct a study to identify solid management means, reduce plastic consumption and promote organic agriculture practice.

- **Action 2: Promoting the use of environmentally friendly transports and public transportation** by **1).** Conducting a study on means of transport and traffic management master plan; **2).** Conducting a study on banning of 24 seat vehicles and bigger into the Angkor park.

3.3. Enhancing Governance for Angkor Heritage Site

To improve management and quality of service for tourists, the following practices need to be implemented:

- **Action 1: Developing human resource:** by creating training programs for APSARA Authority staff, tourism service providers, communities and youth.

- **Action 2: Enhancing partnership through discussion and co-working:** 1). Improving public and private stakeholder discussion mechanism to ensure smooth cooperation; and 2). Updating Angkor heritage site development plan.

The abovementioned practices are some of the major activities in the Angkor Tourism Development Plan. Whereas, detailed plans will be described in “**Angkor Tourism Development Plan 2021 – 2035**” developed by APSARA Authority.

4. Siem Reap City: Historical Heritage Tourism

Authenticity and integrity of Angkor park have a close link to Siem Reap city which is the heart of Siem Reap province offering a variety of tourism activities. Therefore, tourism development must follow the value of historical heritage town protection principles. The development must also comply with Siem Reap land use master plan: vision 2035.

To achieve the Siem Reap tourism development goals of transforming as a world class tourist destination and offering tourists the good memories, Siem Reap city will take a major role in enhancing and improving attractiveness and providing tourism the good memories. The master plan incorporates a strategic plan to promote the town to be “**Premier urban historical heritage destination**”. In this regard, the development of Siem Reap city must improve the urban landscape, environment and public order to be a heritage town managed by smart technology.

According to the survey result, a majority of Siem Reap visitors in Angkor Wat (93%), enjoy nightlife in Pub Street (43%), do souvenir shopping (42%) and visit Tonle Sap lake (41%). These results clearly indicate the important role of Siem Reap city for Siem Reap tourism development.

Table 2.4: Siem Reap tourism sites SWOT analysis

Strengths	Weaknesses
1). An urban tourism site connected to world heritage tourism park (Angkor)	1). The management of solid and liquid waste is limited.

2). An historical heritage tourism city 3). Siem Reap river offers a great attractiveness 4). The town is connected by land, air and water way 5). Offer variety of service for tourists 6). A regional tourist destination with internationally recognized	2). The town road infrastructure is poor. The number of side-walk and cycling paths is limited. 3). Noise pollution from adult entertainment centers. 4). Siem Reap river has not been organized to attract tourist. 5). Insufficient green space 6). Lack of tourist walk street 7). The issue of public order and traffic congestion during major events/holiday 8). Insufficient number of toilets 9). Lack of variety of food service and premier restaurants (Chinese, Korean, Japanese and European). 10). Management policy has not been thoroughly applied to souvenir shops yet 11). Poor parking lot management
<p style="text-align: center;">Opportunities</p> 1). Siem Reap city is prioritized for developing into urban tourism 2). Urban heritage will improve tourism attractiveness 3). Siem Reap city is the entrance to the whole Siem Reap province 4). Tourism development master plan Siem Reap will transform Siem Reap into an attractive tourism city destination.	<p style="text-align: center;">Threats</p> 1). The increased tourist number will negatively affect the environment and create air pollution if not well managed. 2). Some negative images can affect tourist's decision making to visit Siem Reap. 3). Sustainability and development pressure (if management and product diversification are not well operated)

(Source: Inter-ministerial committee)

To achieve the vision of Siem Reap Tourism Development by 2035, the tourism development master plan incorporates tourism service development with varieties and it must be a development that focuses on beauty, quality, green, order, well organized and smart.

Siem Reap city is located in a supporting conjunction for tourism development for Siem Reap province. Not only Siem Reap city is a main entrance for tourists to visit Siem Reap, it is also a major tourist attraction with a number of main attractions such as **1).** Diversity of tourism service center (accommodation, food & beverage, entertainment and shopping); **2).** Entertainment place along Siem Reap river; **3).** Pub Street; and **4).** Museum, old market etc.

At the same time, Siem Reap city offers potential resources for further tourism development such as **1).** Buddhist temples, tourism pagoda (religious tourism); **2).** Creating food village; **3).** Developing green city and smart city; **4).** Creating a walking zone; and **5).** Improving Siem Reap river and garden etc.

Siem Reap city is a tourism central point for Siem Reap province by connecting to different major tourism sites in the province. Siem Reap city is located 10 km from Baray and Angkor Wat. Therefore, a major visit route can be created to connect to the town with main tourist sites to assist the travel of national and international tourists from one to another destination by creating a new tourism product namely “**Siem Reap Pass**”.

The development of Siem Reap city into a world’s attractive tourism city destination is achievable through 3 evidence: **1).** Minimum requirement for a tourism city with international competition, it must be a town with beautiful and clean public space such as: Siem Reap river and road along with a variety of quality tourism infrastructures; **2).** The town must practice basic environmental sustainability, especially an effective waste management system must put in place; **3).** Improve the good hygiene practice for local people to ensure tourist and local well-being.

The government has set a goal to reduce pressure on the environment in the next **15 years** by developing a **new environment management system for Siem Reap city and the province**, raising local awareness and implementing a strict law enforcement.

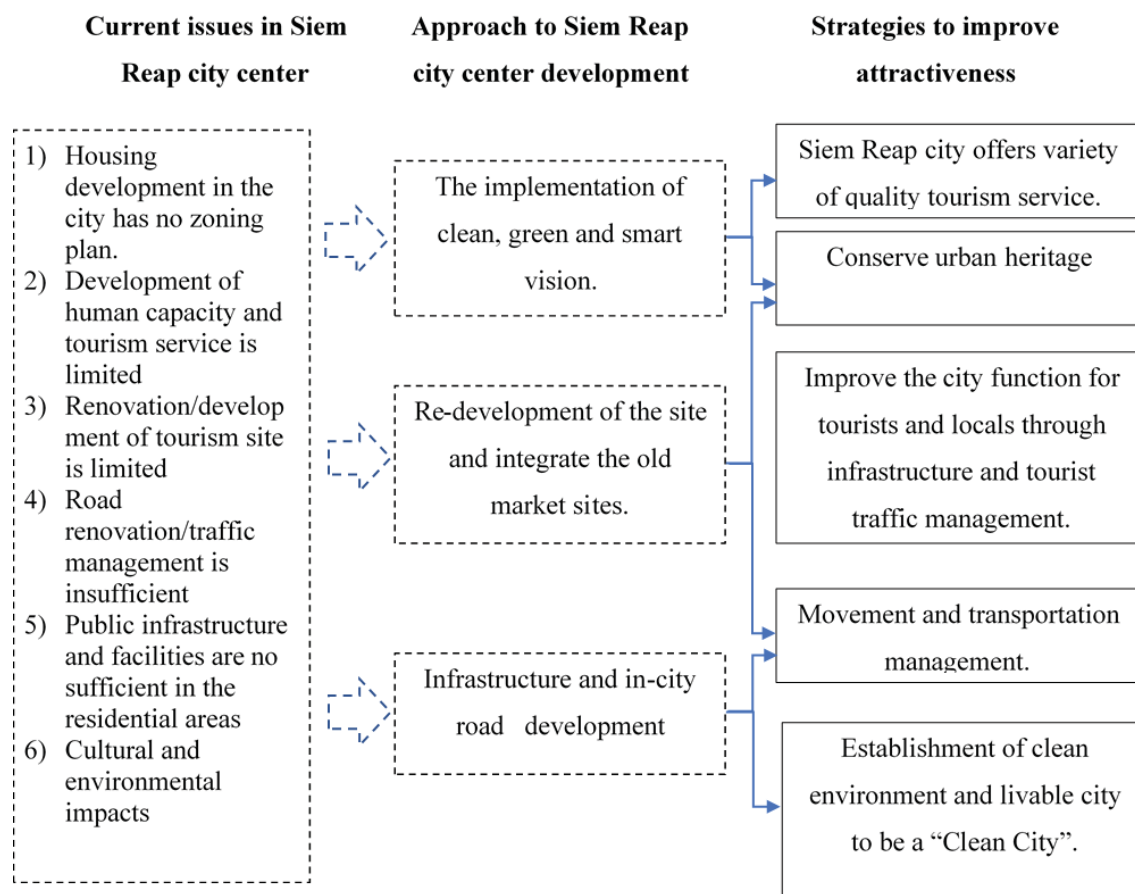
To sum up, the development of Siem Reap city to be an urban tourism destination, **two approaches** are needed. **The first approach** is the mechanism of implementing institutions that must be precise, transparent, and strong for urban planning. **The second approach** is to make the town with more environmentally sustainable development, it must be “**a clean city**”.

Therefore, the master plan has incorporate **3 strategies** to enhance management and tourism development in Siem Reap city as follows:

4.1. Establishment of Tourist Attractions in Siem Reap city Centre

The potential of tourism **in the town center** is vital for the tourism sector in Siem Reap province which requires more improvement/renovation to attract tourists and offer them satisfaction through providing sufficient and quality of tourism facilities.

Detail strategies for development/renovation of Siem Reap city center



To achieve the goal of city center renovation, the following actions must be implemented:

- **Action 1: Offering diverse quality tourism services**

The Siem Reap city center needs to be built and developed to be a diverse quality tourism service center. **Three main factors** must be taken into consideration: **1). Siem Reap city is an accommodation center:** Enhancing the implementation of hotel star rating system and tourist accommodation service, green standards of accommodation service both regional and Cambodian standards to improve quality and sustainability; **2). Siem Reap city is a Food & Beverage Center:** Improving Khmer, Chinese, Japanese, Korean, European, and Islam food tourism and create diverse food and beverage services with quality and hygiene as well as attracting 4 and 5 star new and famous restaurants to cater priority tourist market. In addition to this, Siem Reap city should create at least **two food streets** that comply with Cambodian food avenue standard. Plus, there should be food village that is located in culture tourism Borey area along with the provision of proper infrastructure to welcome domestic and international visitors under the slogan “**Clean City: City with clean food street**”; and **3). Siem Reap is a MICE and Shopping Center:** Establishing international business centers. At the same time, Old Market should be made into a “**Clean Tourist Market**” by renovating and adding more creative and attractive goods. Furthermore, improving handicraft quality and local souvenirs are important.

- **Action 2: Improving and promoting Old Market area**

To improve the attractiveness of the tourism city, there is a need to manage and enhance the attractiveness of the Old Market area and the Night Market (Pub Street). This area is a center of numerous restaurants, bars and souvenir shops very popular for national and international tourists. To improve the city’s beauty, the master plan proposes to renovate the physical infrastructure in the Old Market area such as: **1).** Building a green line and creating a sidewalk network by renovating roads around the Old Market and surrounding areas (Sivutha boulevard, Taphul road, Angkor night market road, Sok San road, and Tep Vong road); and **2).** Traffic and order management and public bus system management.

- **Action 3: Conserving and using urban heritage and nature**

Conservation of French colonial architecture building from: There are some architectural buildings left from French colonial era located in the Old Market. Urban heritage is the valued resource of Siem Reap province. In this regard, it needs to: **1).** Conserving the urban heritage (especially historical buildings) and old trees; **2).** Renovating the urban heritage information board; **3).** The study of a visit circuit based on different topics such as Buddhist temple visit and French colonial building visit adding to the tourist visit package.

It should be noticed that some research studies demonstrate that French colonial architecture buildings located around the Old Market area have cultural value to be conserved. This requires more research work to be done on style and cultural value as a knowledge base for conservation work and promotion of cultural value.

- **Action 4: Making Siem Reap river becomes beautiful tourist river**

Siem Reap river is considered to be the most important historical river for Siem Reap province. This river is the best place to create an ecological tourism system for domestic and international tourists. Siem Reap river (central part) is located near Old Market and Pub Street area and every tourist at least visits this place once during their visit to Siem Reap. However, managing and developing Siem Reap river to be a tourist attraction is challenging especially environmental issues and the attractiveness of the river is limited. In this sense, **developing the Siem Reap River** to be an attractive tourism product must follow the principle of “**Conservation for Development, Development for Conservation**”. The general development of the Siem Reap river must take into consideration **the 4 following tasks: 1). Renovating and managing Siem Reap environment to attract tourists; 2). Renovating walking side along Siem Reap bank (central part)** and at the same time controlling mechanism is needed. Plus, water treatment from residential houses, companies, production, businesses and service industries along the river is required; **3). Creating sport activities and sport tourism for visitors; and 4). Establishing a walking bridge** (provide tourism facilities or small ports).

The tourism potential of Siem Reap river should be developed into tourism activities such as exploration and scenery, recreation and sport, adventure and sport events by making it a **“Luxury and Green River Tourism”**. To do so, there is a need to renovate the river and develop light-weight infrastructure with environmental and culture consideration along the river. Thus, renovating Siem Reap river requires a separate architectural master plan.

- **Action 5: Improving Siem Reap city management and capacity deserving as a “Cambodia Clean City” and “ASEAN Clean Tourist City” through:**

1). A city with sufficient green space is “a city with river and green landscape” with attractiveness. The master plan proposes to renovate the existing gardens², making them more beautiful that comply with the clean city context. This needs to consider of the type of plant and flower, watering system, exercise space, public toilet and information board, etc. Furthermore, it is important to develop more green parks in the town and conserve those of old trees along the streets.

2). The city without noise pollution: Enhance the adult entertainment center management. The master plan proposes to create a zoning for an adult entertainment center in Chreav village, Chreav commune, Siem Reap city by naming it as **“Siem Reap Entertainment Town”**. This area can be a location for all adult entertainment centers that do not have attribute complying with **“sub-degree on adult entertainment center”**. On the other hand, new adult entertainment centers should also be built in this area.

3). A city with sufficient tourism facilities: 1). Must have enough tourism information centers with a variety of information providing technique; and 2). Offering enough public toilets especially in any tourism parks/sites and other important destinations which comply with **“Cambodian and ASEAN toilet standards”**. Direction signs are also provided.

4). A city with a good traffic system and order: Roads in the city and its landscape must have the same style with good infrastructure, environment and hygiene. **Enhancement of order management in Siem Reap city** must focus on: **1).**

² Currently, Siem Reap has gardens: 1. Royal Residence Garden opposite to Victoria Angkor, 2. Preah Ang Chek Preah Ang Chorm Garden, 3. Inthanin Garden for exercising.

Quality management of traffic and tourist movement by managing tourist transportation using minimum standards and Cambodia traffic law, improving Siem Reap travel service association activities and providing good hospitality training to drivers. In the medium- and long-term, the master plan encourages the use of public transportation, provide Hop-On-Hop-Off Bus service which makes traveling within and around Siem Reap more convenient and cheaper. In the long- term, train system is proposed to be used in the town; **2). Expanding bus stations in Siem Reap city** to offer satisfaction and convenience for tourists. To ensure safety for visitors, all stations need to be properly arranged and managed. Separated parking spaces for big buses, family vehicles and tricycle need to be developed with other supporting facilities such as gardens, parking line, entrance and exit lane, waiting space, public toilet and vendor space.

4.2. Expanding buffer zone of Siem Reap city to serve the tourism growth

To make Siem Reap an attractive place for tourists, the urban development pressure should be taken into account in the medium- and long-term especially the Siem Reap city center. Therefore, the town needs to expand to a modern buffer zone that complies with sustainability and conservation principles of the Angkor protection and conservation international committees.

Presently, Siem Reap city has a north border to the ASARA Protected Zone 1 and 2 where urbanization activities have been restricted in the status of heritage attribute. The west border to a potential agricultural zone that receives water supply from the West Baray. To the south of the town is a countryside connected to grass-land area, Phnom Kroam and wet-land area around Tonle Sap great lake. Therefore, **the expanded direction of the buffer zone is to the East along the road 60M** which is called “Siem Reap East.”

To make Siem Reap the “**liveliest town in Southeast Asia**” and to respond to the increasing number of tourists in 2035 with quality, sustainability and responsibility, the Siem Reap East plan must be a smart and green tourism zone that complies with a vision “**Development for Conservation, Conservation for Development**”.

The expansion of this buffer zone will support the tourism product diversification policy (**Siem Reap: Beyond temples**) which the following action must be taken into consideration:

- **Action 1: Establishing MICE Tourism Facilities**

The master plan aims to make Siem Reap a new choice for MICE and Leisure tourism destination. Meanwhile, the Siem Reap East development should use the concept of “**green ideas**” and “**better living**” as a foundation. The Siem Reap East should provide some physical related service (plastic surgery and treatment), green space, day-time sport activities and night-time cultural show and food. The focus on well-being and green of the Siem Reap East can create competitive advantages for MICE tourists who normally spend a lot of time in conference rooms and a busy town. This zone should determine a vision for people who are busy with conferences to be able to ride motorcycles or cycling, swimming and golfing in this community. The purpose is to provide them well-being activities.

- **Action 2: Creating additional tourism Products-Angkor Plus**

Beside MICE tourism, the Siem Reap East must also provide leisure tourism products to international and domestic tourists. The provision of more tourism products is to encourage international tourists to spend 1-2 days more and also attract domestic tourists to revisit the place. “**Angkor Plus**” strategy is to create more visits beside the temple, prolong the stay and increase the number of visitations. New and attractive tourism service, as expected, can prolong the international tourist stay to 3 to 5 nights on average.

- **Action 3: Establishing international standard educational center and hospital**

The master plan has put Siem Reap a new educational center to fill the high quality education demand domestically and an international hospital in this buffer zone. The master plan also motivates to create one or more international universities, one or more international school. Furthermore, this location should also have a Cambodia Research Institute for research visit types.

- **Action 4: Establishing second home tourism zone**

The master plan proposes to develop residential and commercial zones in the medium- and long-term run. Residential and commercial zones can cover 65% of the land area with an expectation of 30,000 to 40,000 residents, domestic and international tourists to reside in this area as their second home. The **Siem Reap East** should have a **housing zone** which is a multi-purpose development providing choices to everyone such as a holiday home for people from Phnom Penh and other provinces, serving for domestic and international tourists especially elder tourists (second home tourist). The development plan must take into account housing for everyone including size, variety and high value. At the same time, providing supporting facilities for the use between housing and commercial zones or other public activities.

- **Action 5: Managing and Developing the “Siem Reap East”**

Under the leadership and control of local authority, the development of “**Siem Reap East**” will hand over to **developers** who have proper development capacity. The development of this buffer zone must be run under the public-private partnership manner. Developers of this area must have a detailed Siem Reap East development plan which is checked and approved by the Royal Government of Cambodia.

4.3. Management Mechanism and Tourism Development for Siem Reap city

To achieve the goal of digital urban planning and tourism governance of Siem Reap city, the following action must be operated:

- **Action 1: Using smart technology to develop Siem Reap into “Smart City”**

According to **Cambodia 4.0 Center**, Smart City refers to the use of smart technology in managing traffic flow, safety and security system, transportation, good governance, environment, smart living etc. This means to make the people living standard into a better environment and the capacity to manage social risks through smart technology. The development of Siem Reap into a smart city must focus on several important strategies such as **smart economy, smart movement, smart living, smart citizens and smart governance**.

- **Action 2: Strengthening Siem Reap Tourism Governance**

To manage and develop the tourism sector in Siem Reap city, the master plan proposes to create a “**Destination Management Organization**” who will become developer and manager for Siem Reap city tourism. This DMO is under public and private partnership or public-private-community-development partner.

Every collaboration between investors, tourism operators and DMO must have a precise contract and Charge Book with fair benefit sharing.

5. Tonle Sap Lake Area: Nature Based and Eco-Tourism

Tonle Sap lake is one of the biggest lakes in the world which takes 30 minutes south of Siem Reap province. There are small boat services operated by locals to bring tourists to the floating village sightseeing. Tourist boat trip is one of the attractive resources of Siem Reap province. Tonle Sap is a biosphere reserve that needs to be protected (flora, fauna and bio diversity located in the core of Stung Sen and flooded forest) for the purpose of conservation. Based on “**eco-tourism principle**”, it can be used as a foundation for the development of “**Nature Tourism Village**” which can provide luxurious accommodation types or homestay with the locals. These types of accommodation should be located in the areas of Kampong Phluk, Kampong Klaing or Chong Khneas that can offer economic benefits to the locals. Moreover, more tourism activities can be included around the villages such as **bicycle trips, boat trips, agro-tourism, organic products sales and tree planting, etc.** In this area there are 5 villages: 1). Phnom Kroam - Tourist Port - Chong Khneas, 2). Pea Raing Community based tourism, 3). Kampong Phluk Village, 4). Kampong Khlaing and 5). Mae Chrey Community.

Because of the attractive and beautiful nature with fishing communities, Tonle Sap becomes the main tourist destination in the area. However, there are challenges to be solved such as livelihood of fishing communities, water treatment for consumption that do not harm to the environment, promoting the value of nature and the sustainable use of water. The current situation of Chong Khneas village remains poor and needs to be upgraded to meet the demands of tourists. Based on this, the master plan proposes to implement the product diversification by improving the existing tourism service and products and to creating new products to offer a variety of choices for visitors.

According to a survey result, 41% of Siem Reap visitors have visited the Tonle Sap area. It is evident that we have to promote and improve the tourism attractiveness of the Tonle Sap area.

Table 2.5. Tonle Sap Tourism SWOT Analysis

Strengths	Weaknesses
<p>1). Tonle sap is a biosphere reserve that needs to protect its ecology system (flora, fauna, biodiversity and flooded forest) and its socio-economic attribute (source of fresh water fish among other 4 biggest world fresh water sources).</p> <p>2). Tonle Sap Lake is a home of numerous biodiversity such as fish, bird, reptile and flora which are heritage resources.</p> <p>3). There are 5 community-based and eco-based tourisms in the area.</p> <p>4). Tonle Sap lake is a great flooded movement inter-link with the Mekong river.</p> <p>5). Tonle Sap lake is internationally recognized.</p>	<p>1). Tonle Sap ecology system is easily affected by human development activities and natural disasters.</p> <p>2). Solid waste issues (plastic) in Phnom Kroam area and other tourism communities in Tonle Sap area.</p> <p>3). Liquid waste issues from boat, tourist boat and floating house.</p> <p>4). Management mechanism and coordination between public, private and community are not effective and smooth yet.</p> <p>5). The development of tourism activities is limited.</p>
Opportunities	Threats
<p>1). Product diversification to extend visitors' length of stay in the lake area.</p> <p>2). International tourists' interests to visit the lake area</p> <p>3). Ability to create additional tourism products</p>	<p>1). The nature and environment of the lake will be negatively affected if the development is not proper.</p> <p>2). Overused on natural resources and biodiversity.</p> <p>3). The use of illegal fishing tools, deforestation for agriculture land, the use</p>

4). Renovate all tourist ports in the lake area (Especially Chong Khneas) to improve attractiveness.	of chemical substances and water pollution. 4). Climate change that can negatively affect the natural resources and the lake potential.
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(Source: Information adopted from Tonle Sap Authority's document)

The development of tourism products in Tonle Sap area focus on the integration of the **5 main destinations** such as 1). **Tourism Community at Chong Khneas (near Phnom Krom)**, 2). **Eco-tourism community at Boeung Pea Raing**, 3). **Nature-based tourism community at Kampong Phluk Village**, 4). **Eco-tourism community at Kampong Khlaing** and 5). **Nature-based tourism community at Mae Chrey**.

To grab the opportunity of the tourism potential and nature resources of the Tonle Sap Lake, the master plan proposes to renovate the tourist ports and tourist boats, floating houses and tourism product diversification as well as improving the above existing community based tourisms.

5.1. Improving Tourism Service and Product Diversification at Tonle Sap Area

To ensure the highly effective tourism development in Tonle Sap lake, to offer divers choices and to attract more tourists to stay longer, the following action must be taken into consideration:

- Action 1: Improving the tourism service in the Tonle Sap area

Improving tourist accommodation service: Beside improving the appearance of the floating houses, improving the tourist accommodation service to comply with service standard (Cambodia home-stay standard) which is essential to satisfy tourists. Approved by the Ministry of Tourism, Cambodia home-stay standard focuses on community home-stay, rural home-stay and city home-stay. To enhance the accommodation service in the Tonle Sap Great Lake area, vocational skill training, standard practice and homestay loan program “**Tonle Sap My Home**” are needed.

Improve food & beverage service: Making a restaurant or food stall become attractive depends on creativity, beauty appearance and good service, especially food quality and hygiene. It is recommended that the community or the local people should create more food stores or restaurants to make direct incomes for their family. At the same time, those food and beverage businesses must follow the tourism food & beverage standard of the Ministry of Tourism. This requires food quality improvement and food preparation skills.

Improve tour guiding service: Local tour guides are needed in the **5 areas** of Tonle Sap Great Lake. Those guides are recruited from the community and need to be trained and recognized. Beside guiding tourist in their communities, those guides should also be given additional training so that they can become “**Tonle Sap Guides**” who are able to provide guiding service to other places within Tonle Sap area. All tour guides must follow code of conduct and professionalism to earn trust, to offer quality of service and safety for tourists.

- Action 2: Renovating the tourist ports

To make Tonle Sap a more attractive destination, it is essential to renovate all the **5 above** tourist ports to enable traffic flow and to ensure tourist safety. Minimum facility to support the running of the ports include **a restaurant or food store, a café, administrative building, information board, garden, playground, parking for motorbike, bicycle and tricycle (tuk tuk) parking for family vehicles, parking for bus, a trail to boat port, ticket stall, waiting area and public toilet**. On the other hand, Phnom Kroam tourist port (Chong Knease tourist port) is the biggest port and it is a main entrance to Tonle Sap. Supporting facilities to be built include tourist information center, relaxing hut, community market, gas station, a high standard restaurant and “**Tonle Sap Home**” which can serve as fish and under-water resource museum and as a place for exhibition and photography.

A precise architectural plan is needed for the construction and development of this tourist port.

- Action 3: Improving the quality of tourist boat

Compared to 41% of international tourist arrival to the place, there are **942 tourist boats** offering service in the Tonle Sap Lake area. Tourist boat statistic is attached in appendix 7.

To improve quality of tourist boat service, there is a need to improve the tourist boat service to meet the standard from the ministry of tourism focus on the driver and boat itself. These are important factors to be taken into account. **1). Environmentally friendly:** Each boat has to provide a rubbish bin, brochure and booklet related to personal waste management and provide additional instruction if needed. **2). Decoration:** Each boat must have a Cambodian flag with Khmer writing letter on the boat demonstrating name and community. Boat should be painted with a proper color and attached with beautiful and strong seats. **3). Safety:** Each boat must be equipped with a fire extinguisher, first aid tools and swim-vests that equal to the number of seats. It must also with horn and light in case it operates during the night time. **4). Good hospitality:** All drivers must use uniforms offered/issued by the community which is recognized by the provincial department of tourism. They must also follow the ethical principles and make sure the port and parking spot are tidy and clean.

- Action 4: Improving the quality of home-stay and the floating houses

Providing leisure type homestay for visitors who want to take a break from the city and looking for a rural atmosphere. This kind of homestay can be grouped into **2 types**: **1). Local homestay** that allows visitors to stay with the house owners (this must follow the **Cambodian homestay standard**, it must be a house with a strong and quality structure as well as ability to provide safety for customers' eating and staying, food can be prepared by the home owner). **2). Modern homestay** with strong structure, hygiene, safety, good management and offer mattress, lamp and toilet.

The **floating house** can be arranged into **2 types**: **1). A private type accommodation:** A tent floating house type which is climate resistant or a newly built private house on a tree. **2). A floating resort type accommodation:** A light building structure which is climate resistant. This development requires a precise master plan and it must ensure minimal impact on the environment, and it requires a license from the technical institutions/ministries.

The renovation of the floating houses must take the future Tonle Sap Lake environment into consideration. The sustainable development through the enhancement of water resources, natural resources, cultural resources and ecology system management responding to the climate change issues. At the same time, the use of bamboo, which is a renewable resource, for the floating house floor should be motivated. “Environmentally friendly floating house principle” is introduced in order to take part in improving the floating village beauty/appearance. At the same time, the use of bamboo, which is renewable resource for the floating house floor should be motivated. “Environmental-friendly floating house guideline” is introduced in order to take part in improving aesthetic of the floating village.

- Action 5: Creating tourism information center and mobile app for Tonle Sap Lake circuit

To provide more convenience for visitors, a tourist information center associated with the building of Tonle Sap Lake museum that located in Chong Khneas area (Phnom Kraom) should be developed. At the meantime, the tourism mobile app and a website for Tonle Sap tourism should also be created to promote the Tonle Sap Lake destination. Additionally, there should be the use of AR/VR technology to create Tonle Sap Lake tourist circuit in order to provide tourists the explanation and to organize 1- or 2-days package tour across communities.

- Action 6: Diversifying recreational and attractive tourism products in Tonle Sap Lake area

The master plan requires to put an effort to develop more tourism products with creativity and innovation in the Tonle Sap Lake area based on social-economic and environmental sustainability and responsibility principles. It also proposes to establish an aquarium, called “**Tonle Sap House**” to exhibit the lake’s biodiversity and its unique flow of water and so on. This aquarium must be created by using digital technology and shall be located in Phnom Kroom (Chong Kneas), and in the future the place will become a research and study destination for domestic and international tourists. At the same time, cruise ship tour circuit in Tonle Sap Lake that offers a lengthy visit (2 days, a

night) should be provided. A feasibility study for private mini waterplane or helicopter that can land on water serving the interest of up-market visitors must also be conducted.

5.2. Strengthening quality of environment and landscape of Tonle Sap Lake

Tonle Sap Lake's environmental issue remains a big challenge that need to be tackled to improve the “**Clean and Green**” and attractiveness of the lake. Proper solid and liquid waste management plays a big part to improve the beauty of the floating village even though the style of the structures is not consistent and is not located in a beautiful landscape location. Plus, improving local well-being in the floating village is essential. To serve in the tourism sector and to promote local well-being in the floating communities, the following actions shall be implemented:

- Action 1: Managing solid waste

To reinforce the solid waste management, it is required to conduct a feasibility study on creating garbage collector unit or cleaning team or volunteer environmental team. It also needs garbage boats to clean up the river, lake, reservoir, dam, pond and other water sources. Additionally, there is also a need to create campaign for clean floating community or no-plastic floating community and other housing improvement projects for local people in the floating community.

- Action 2: Managing liquid waste

To improve liquid waste management in the Tonle Sap Lake area, there is a need to create a project “**Clean floating house**” to improve the overall hygiene in the floating community. This project should focus on waste management cycle by establishing a waste management station to carry out water treatment and to drain safe waste into the water and to turn those waste into marketable goods such as fertilizer and biogas. Additionally, establishing floating toilet is important to treat human waste before it can destroy environment by preliminary treatment before draining into the water.

5.3. Management and Development Mechanism in Tonle Sap Lake area

The tourism development in the Tonle Sap Lake area requires participation from various actors to ensure the effectiveness and quality of tourism services and products.

To manage and develop tourism sector in Tonle Sap Lake area, the master plan proposes to establish “Destination Management Organization” that will become an actor to develop and manage tourism sector in the area. This separate organization is created under a form of public-private partnership or people-public-private-development partner partnership. All relations between investors, tourism operators and the destination management organization must be made under contract terms and a clear charge book with fair benefit sharing mechanism. In addition, in order to ensure the sustainable and responsible tourism development in the area, it is essential to take into account the decoration and maintenance of tourism facilities (including hygiene and waste management) and assurance of tourists’ security and safety. All these works require financial resource which can be generated from ticket, usage fee, local service fee, selling and concession fee for tourism activities in the area.

6. New Siem Reap Tourist Site

Based on the 2035 Siem Reap tourism development vision, adjectives and goals, the establishment of new Siem Reap tourist site is a response to the population growth, Siem Reap urban planning, increasing accommodation and entertainment service demands to host visitors in both medium- and long-term and to avoid development pressure on Siem Reap city and the Angkor heritage site. This area must be developed in clean, smart and green to attract up-market and second-home tourists. This area is a hub for luxurious hotels, golf course, theme park, technology park, international medical center, tourism commercial center, international exhibition center, second home center, stadium, civilization museum, and residential area. The development of new Siem Reap tourist site requires a precise study on urban landscape, supporting infrastructure and clear and comprehensive management and development mechanism.

Part 2: Strategy for Developing New Tourism Products

Base on a survey result (2019), Siem Reap province must carry out tourism product diversification. 71% of international tourists suggested to offer rural tour, 66% suggested year-round events, 66% suggested the livelihood of Tonle Sap Lake residents.

Responding to the 2035 tourism development scenario and to meet the abovementioned needs **the tourism product diversification must link to the new tourism product development strategy** and to offer diverse tourism products including cultural tourism (tangible and intangible), nature-based tourism, rural tourism, agro-tourism and other types of tourism activities.

The potential of these new tourism products can create new and dynamic tourism activities. Siem Reap has the potential to develop 6 new types of tourism products: 1). Cultural, heritage tourism and religious tourism, 2). Green tourism, 3). MICE tourism, 4). Rural and Agro-tourism, 5). Sport tourism and 6). Senior Tourism-health tourism and second home tourism.

1. Culture, Heritage, Religious and Belief Tourism Products

Siem Reap must create new cultural tourism products and have to better positioning itself on what existed in order to fully use the cultural heritage resources for tourism benefits. Additionally, **creative industry** must be developed by attracting and utilizing creativity of writers, artists, actors, dancers and painters to create attractive tourism products.

Therefore, to make Siem Reap the most outstanding cultural tourist destination in the region and worldwide, to extent visitor stay and to increase visitor expenses, following actions must be taken into consideration:

- Action 1: Creating world heritage circuit and trail

The creation of world heritage circuit is a potential resource to attract domestic and international tourists to visit Siem Reap and surrounding area. The world heritage tourist trail can link between the Angkor heritage site, Preah Vihear heritage site and Sambo Preikuk heritage site. In order to make this world heritage trail attractive, the development of supporting infrastructure and tourism facilities is needed. Additionally, improving tourism service, providing attractive and creative services and offering interpretation through tour guides and/or the use of digital technology. **Besides temples**, Siem Reap circuit and route can: 1). Link the heritage route with gastronomy, 2). This travel route can also link to various research sites and museums to explain visitors the Angkor's role and to allow tourists to learn about Khmer civilization, culture and

history, nature, belief and religion. We can also develop travel routes based on themes. For instance, the temple and holy nature of Phnom Kulen circuit, and/or Buddhist temples in Siem Reap and/or religious events that reflect the potential of religious tourism. 3). **Must connect this heritage trail with youth tourists:** Promote domestic tourism especially youth and children as stated in 3C's concept of **H.E Hun Many**, Chairman of the Commission of Education, Youth, Sports, Culture, Religious Affairs and Tourism to the National Assembly and President of the Union of Youth Federations of Cambodia (as shown in Figure 6 in Appendix), which **C1** stated about Cambodianess, focuses on the importance of preserving national identity. In this context, we encourage domestic tourists to travel more to cultural tourist destinations to learn about the traditions, culture and history of each destination by using local tour guide services, talking with local people or using technology. As a result, through this kind of traveling, youth, children and Cambodians will understand more about our culture and history, boosting nationalism, preserving national identity and promoting national culture and history which reflects the concept of "**Patriotism, knowing the Territory.**"

- **Action 2: Establishing Civilization Museum**

To develop additional cultural tourism products, there is a need to encourage tourists to stay longer to boost Siem Reap economy. These products should link to both tangible and intangible cultural resources and they must be presented to tourists to deeply understand them. This action strategy includes the initiation on the establishment of a new **Civilization Museum** that presents the history of the temples (tangible heritage) and world intangible heritage connecting with the livelihood and tradition of Khmer people of each era (using of modern technology 4.0 like Acropolis Museum in Athens City of Greek). This museum will provide a visit route that is meaningful and digital interactive for tourists which create a better experience.

- **Action 3: Developing the innovative tourism connecting with creative industry**

Cambodia has a huge potential for cultural resources include the tangible and intangible ones. Cambodia is internally recognized with its 08 cultural resources that have been

listed in the UNESCO World Heritage List³. The Creative Tourism is the core strategy that will help Cambodia to become a lively and attractive tourist destination and to boost economic value by using cultural resources combine with innovation, knowledge and creativity. Siem Reap owns the uniqueness that makes creative tourism becomes an important part for medium and long-term tourism development. This growing creative tourism will offer additional experiences beyond what have been offering and in return this is an effective tool to protect and promote intangible heritage resources. Type of creative tourism that has potential for Siem Reap province are: 1) Movie Production by promoting “Movie Tourism” in Cambodia especially attract international producers to film in Siem Reap which is an effective mean for tourism promotion. 2) **Creative Handicraft (Souvenir)** must create supporting programs (Financing, training and creative technology to support local artisans in Siem Reap and the surrounding provinces. 3) **Lively art** we must enhance creative industry by boosting intangible market with service usage from international and domestic tourists. At the same time Khmer Martial Art especially Siem Reap “**Labokatoa**”⁴ must be organized in a training center in order to train international tourists (foundation). Additionally, it is also encouraging to create a standard place to present the Labokatoa every day and weekend. 4) Food: To make food become an important role in the creative industry, several actions must be carried out. These include 1) the creation of annual events that not only focus on food and local products but also food creativity including food study and 2) Establishment of food institution and creative industry as a part of national tourism school.

- Action 4: Creating and improving heritage interpretation tools for tourists

³ **03 Tangible World Heritages:** 1. Angkor (14 December 1992), 2. Temple of Preah Vihear (07 July 2007), 3. Temple Zone of Sambor Prei Kuk, Archaeological Site of Ancient Ishanapura (08 July 2017)

05 Intangible World Heritages: 1. Royal ballet of Cambodia (07 November 2003), 2. Sbek Thom “Khmer Shadow theatre” (25 November 2005), 3. Tugging rituals and games (02 December 2015), 4. Chapei Dang Veng (30 November 2016), 5. Lkhon Khol Wat Say Andet (28 November 2018)

⁴ Labokatoa was the first traditional Khmer martial art that used to fight enemies during the Angkorian period. Practitioners must use array of elbows, knees, arms, legs, and head, and short sticks are usually used as weapons.

To promote cultural tourism products in Siem Reap, there is a need to create and improve tools and means for interpretation for domestic and international tourists. These include: 1) Local author and painter: can be employed to develop a better story telling for tourists so that they can understand the heritage. At the same time, it is encouraging to offer painting service from out painters to domestic and international tourists by demonstrating Angkor Wat or other temples. 2) Tour guides need to improve their knowledge and capacity regularly and to create special tour guides for heritage zone for international tourists and they will become domestic tour guides. 3) Using interpretation by mobile app or AR or VR technology to provide tourist interpretation and explanation the meaning of tangible and intangible heritage (Khmer and foreign language) that to be installed within cultural destinations and other location within Angkor Heritage Zone.

2. Green Tourism Products

Green tourism development in Siem Reap is a priority strategy in the master plan because of the current number of world tourists and Cambodia inbound is increasing. Tourists traveling to Siem Reap and other surrounding areas have a great interest on “Green Tourism”.

Important factors to make Siem Reap green tourism development successful are the participation from stakeholders in the development, management and business operation. This participation not only focuses on leaders or strategy developers but also tourism service providers, development partners, local people and tourists who are environmentally responsible.

Presently, green tourism helps to solve 4 main issues such as water, power, waste and biodiversity that can affected from tourism if not well managed. To solve these challenges, the following action must be carried out:

- **Action 1: Developing ecotourism and community-based tourism**
- **Action 2: Promoting the movement of “Clean City, Clean Resort, Good Service, Best Hospitality” contest and transforming Siem Reap city to “Environmental-friendly city”**

The movement of “Clean City, Clean Resort, Good Service, Best Hospitality” contest not only ensures the promotion of the national prestige and boost the promotion

and development of tourism, but also achieves the strategic goal aiming to transform Cambodia into an attractive and warm tourist destination in the region and the world. Meanwhile, the Government has adopted the **“Clean City Contest”** through the National Committee for Clean City Assessment, who is in charge on the implementation, providing consultation and advices to cities-districts in order to promote and maintain beauty, hygiene, good environment and transform the urbans into vibrant place to live, socio-economic development places based on a common standard in line with the principles of sustainable and responsible development.

Moreover, from the 2035 vision, Siem Reap city must be developed to be environmental-friendly city, which utilization of eco-friendly transports, construction of eco-friendly buildings, and high consideration on environment among locals are motivated.

- **Action 3: Enhancing the “One Tourist One Tree” campaign and creating “Tourist Park”**

Based on Green and Clean concept, the Government has adopted the **“Clean City, Clean Resort, Good Service, Best Hospitality”** contest to transform Cambodia to a clean, attractive and green tourist destination. The Government also has adopted the “One Tourist One Tree”, “One Couple One Tree”, “One Youth One Tree” campaigns to increase the tree plantation among domestic and international tourists, and ultimately stimulate tourists and publics to participate in tree plantation movement at Tourist Parks.

Tourist Park in Siem Reap province can be established in the Angkor heritage site or in the Phnom Kulen National Park.

- **Action 4: Implementing Green Standard in tourism industry in line with the ASEAN and Cambodia Green Standard**

In addition to the Government’s effort, private sector also needs to involve to ensure the sustainability through making adjustment of their **business operation** by taking into account “cooperate social responsibility” concept. Accommodation, transportation, food and beverage services as well as all tourism operators must consider on their business’s sustainability not only in terms of financial sustainability, but also the cultural and natural resources through the initiative on energy saving and renewable

energy consumption in accommodation sector, and so on. Therefore, the establishment of green business award standards in the tourism sector is an initiative aimed at promoting green business and improving the quality of services in Cambodia's tourism sector.

The master plan requires all business establishments in Siem Reap to comply with the requirements of the green standards, including: “Samdech Techo Prime Minister Eco-Business Awards” and “Green Standard in Tourism Industry” (National and ASEAN Level).

Direction: the direction of green standards in the tourism industry in Siem Reap is that at least **50%** of tourism establishments must be certified by the Cambodian and ASEAN Standards by 2030 and **100%** by 2035.

3. MICE Tourism⁵ Products

Siem Reap is highly favorable for the development of tourism products based on events, conferences, and meetings that can attract more diverse national and international tourists, and increase the tourists' length of stay.

At this point, it is very imperative to create tourism events to increase the competitiveness of Siem Reap tourism. This type of tourism products can be organized in the form of either local or regional and global events, which can be: **1).** Occasional events such as hosting major sport events or international conferences which are held in different countries yearly; **2).** Annual regular events such as Angkor Sangkranta, International Culture Festival, Music Festival, Food Festival, Sports Competition, etc.

For Siem Reap to be the MICE destination, the following actions must be implemented:

- **Action 1: Organizing occasional events**

In order to increase more tourist arrivals in Siem Reap, Siem Reap must organize occasional events, including: **1).** national, regional and international events or meetings (MICE venues); **2).** nightlife entertainment events in the Angkor heritage site, which is characterized by: **a).** Organizing special programs or events at night in the Angkor

⁵ MICE Tourism focuses on Events, Conferences, Meetings.

heritage site for high-end tourism events (especially during the low season), **b).** Organizing special concerts that incorporate Khmer art and music at special occasions of the year and **c).** Organizing as a high-end event, supporting Mega-MICE events only.

It should be noticed that all occasional nighttime activities in the Angkor heritage site are scheduled by the APSARA Authority.

- Action 2: Organizing regular events

At this point, the size of the gathering of regular events or festivals in the tourist destination should be organized annually, which is really important to attracting repeat tourists. **For example**, regular sports events such as the Siem Reap Marathon and Angkor Ultra Trail, etc. On the other hand, the "**Angkor Sangkranta**" tourism and cultural event is organized by the Union of Youth Federations of Cambodia on the occasion of the traditional Khmer New Year. Therefore, the master plan calls for efforts to develop more sports events regularly, by the provision of support infrastructure for such arrangements.

- Action 3: Developing the support infrastructure for MICE tourism products

Siem Reap should build infrastructure to support the MICE tourism, where necessary by: **1).** Attracting investments on international conference and exhibition centers in the satellite area of Siem Reap city (short-and medium-term) and in the new Siem Reap tourist area (medium- and long-term); and **2).** Establishing mechanisms to facilitate and encourage national and international companies to organize events, meetings, conferences and exhibitions in Siem Reap. In this regard, the Cambodian Tourism Marketing and Promotion Board (Siem Reap Branch) must act on these facilitation mechanisms.

4. Rural Tourism and Agro-Tourism Products

This strategy is set up to take advantage of Siem Reap's rural areas to allow domestic and international tourists to experience new activities in "**seeing**" and "**doing**" during the tour. This rural tourism development aims to diversify tourism (**Siem Reap beyond the temples**) in order to integrate existing tourism supplies with newly established tourism supplies.

The objective for the development of rural tourism and agro-tourism in Siem Reap is to increase the choice of domestic and international tourists by implementing the following actions:

- Action 1: Integrating the Rural Development Strategy and Action Plan

Rural tourism and agro-tourism development in Siem Reap need to be integrated into the Rural Development Strategy and Action Plan. This strategic action requires close cooperation among the institutions in charge of tourism, infrastructure, agriculture and rural development, education, etc. To enable rural tourism development to meet the goals of national and local economic growth and to contribute to poverty reduction, there should be an inter-ministerial working group under the National Committee for Tourism Development (using the mechanism of the Siem Reap-Angkor Tourism Management and Development Committee) and the Siem Reap Provincial Tourism Development Commission is responsible for coordinating rural tourism and agro-tourism development activities in Siem Reap. In this inter-ministerial working group, there must be the private sector (there should be the establishment of rural tourism and agro-tourism associations).

In the meantime, we also need the involvement of NGOs in Siem Reap. To ensure the development of rural tourism, it requires knowledge and technology transfers in designing and developing tourism products to serve rural tourism and agro-tourism activities.

- Action 2: Diversifying and modernizing rural tourism and agro-tourism products

Based on the assessment of the potential of rural tourism resources, priority areas for the rural tourism development that can attract tourists to Siem Reap are Banteay Srey and the surrounding area, and the Tonle Sap Lake area. In the future, Siem Reap could become a tourist attraction for cycling in the Angkor heritage site, ox cart riding in the Banteay Srey area, sports activities linked to traditions, etc. Siem Reap is a leisure destination where tourists can experience farm and village tours, educational tours, special interest tours for photography, and agro-tourism, etc.

In addition, tourists are increasingly relying on technology to access information. Rural tourism products can be made lively through using new interpretation techniques

that can attract new and existing markets and meet their expectations. Additionally, technology is needed for the development and management of rural tourism and agro-tourism in Siem Reap.

- **Action 3: Ensuring the quality of rural tourism and agro-tourism products**

Ensuring the quality of rural tourism and agro-tourism products through the implementation of rural tourism and agro-tourism quality standards in accordance with the following criteria: **1). Conditions:** demonstration of maintenance and hygiene measures at the business establishments; **2). Physical and individual comfort:** quality of tourism services and hygiene of service staff; **3). Service and hospitality:** provision of good services to customers; **4). Tourist Experience Focus:** establishment of real activities to increase tourists' experience and is adhered to standards and applying equally to all customers without discrimination; **5). Provides options and convenience for tourists:** visitors' experience will be enhanced by providing options (options of in-room drinks or room temperature, etc.); **6). Cleanliness** and **7). Label development:** Siem Reap Rural Tourism.

- **Action 4: Raising awareness among tourists**

Raising awareness among tourists require actions such as: **1).** Establishing a rural tourism and agro-tourism section on the official website of Cambodia Tourism; **2).** Updating Siem Reap Tourist Guide Book and increasing the presence of tourism promotion on social media; **3).** Organizing the Familiarization Trip for the media, including bloggers; **4).** Cooperating with rural-based tour operators; **5).** Developing mobile application for self-driving tour to rural tourism and agro-tourism sites; **6).** Organizing and creating post-visit incentive programs such as experience sharing groups on Facebook, WeChat, or WhatsApp called “**Siem Reap’s Friends**” to share information about new tourism products to encourage repeat visits; and **7).** Following tourism marketing approach that is well-targeted through creating “**Rural Tourism Day in Siem Reap**”, which the event is organized in collaboration with the Ministry of Agriculture, Forestry and Fisheries and the Ministry of Rural Development to promote agricultural activities, and to elevate Siem Reap as a destination for agro-tourism and rural tourism. In time being, there will be events at tourist sites in the villages, with

services provided to tourists such as learning about local skills and trials, and educational entertainment programs as well.

- Action 5: Encouraging the participation of local communities

The participation of local communities should be improved through training and capacity building, in: **1).** Setting business planning (creating a roadmap for rural enterprises); **2).** Developing digital literacy in community-based tourism (for reservations) and customer relations, online marketing; **3).** Developing tourism products with quality; **4).** Acquiring sustainable financial management.

Current and future rural entrepreneurs should be supported with one-stop business consulting services that can assist rural tourism entrepreneurs, including: **1).** Assessing the entrepreneurial skills and competencies; and **2).** Assisting local communities to set up enterprises, including processing formal documentation and registration, developing a business plan, financing, training and categorizing the necessary training, along with the introduction of quality criteria and the establishment of the Siem Reap Rural and Agro-Tourism Association.

- Action 6: Establishing rural tourism and agro-tourism fund

Developing guidelines for financing rural tourism and agro-tourism development, as well as incentives for corporate social responsibility programs that support rural development and should be piloted in tourism development in Siem Reap. At the same time, encouraging the provision of financing to support rural tourism development activities through **the Rural Development and Agriculture banks or the SME banks.**

5. Sports Tourism Products

Sports tourism products are important for the tourism diversification strategy in Siem Reap. Siem Reap has a lot of potential in terms of outdoor sports tourism, especially the half marathon event.

Half Marathon event: Siem Reap Province has been successful in organizing tourism sports events, specifically major marathon events: 1). Khmer Empire Marathon; **2).** Angkor Ultra Trail; **3).** International Half Marathon. To achieve this strategy, the following actions must be taken into account:

- Action 1: Creating more attractive events or sports activities

Based on international experience, Siem Reap should develop a sports tour package that combines a variety of sports activities with a variety of entertainment options (dining, spa, gym, health, sports and landscaping). At the same time, some of the activities set in the master plan are: **1). Creating major sports events:** Competitiveness in the field of culture can create innovations related to tourism products. **“Cultural Competition”** events can be created in several phases, divided into **“Cultural Aspects”** which corresponding to local tourist attractions and **2). Developing a method for promoting brand of sports tourism products in Siem Reap based on the reputation of the province:** In regard to the protected heritage and natural landscape aspect of Siem Reap, it necessitates to design the logo of the provincial sports tourism event to create an identity for the event (the single color-coded in the calendar to identify events, branding events, and graphic charts sample of the races for future products). These aim at promoting the values of Siem Reap by connecting the event to the place.

- **Action 2: Developing diverse sports tourism products**

Siem Reap can organize various sports tourism products, including: **1).** Mountain hiking and trekking activities in Phnom Kulen National Park; **2).** Leisure cycling; **3).** Mountain cycling; **4).** Sports activities in Tonle Sap Lake; **5).** Labokator Martial Art demonstrations; and **6).** Investment in the international golf courses.

- **Action 3: Promoting and developing indoor sports tourism**

Along with the promotion and development of sports tourism activities, Siem Reap should also promote and develop indoor sports tourism, which can attract sport tourists, especially both domestic and foreign youth tourists. In this sense, in the medium- and long-term, a stadium should be built. The development of indoor sports tourism activities may attract up-market tourists and youth tourists (both national and international).

6. Senior Tourism -Health Tourism and Second Home Tourism Products

The promotion of tourism for the elderly people will benefit other sectors such as health, wellness and medical and boost the growth in other related sectors (such as rural tourism, agro-tourism, which elderly tourists prefer) as well. A common strategy set out for these sectors in Siem Reap is to develop senior tourism linking with health

tourism and second home tourism, as well as cultural heritage tourism and ecotourism tourism. To achieve this, the following actions must be implemented:

- **Action 1: Developing creative study tours for senior tourists**

Tour packages for senior travelers are a combination of education with tourism activities. Senior tourists will attend short courses at Universities in Siem Reap, which has been recognized as university for senior tourists (U3As)⁶ where they can explore Khmer cultural heritage, historical, traditions, Labokartor martial arts, agriculture, nature, local food associated with a field trip during their stay.

Siem Reap must create a favorable environment for high-cost tourists to make better use of tourism products and services. Development of senior tourism products and activities includes: **1).** Developing a rural tourism strategy for senior tourists by preparing or modifying attractive rural tourism products for this market; **2).** Creating opportunities for senior tourists to purchase safe food products produced and processed by members of the agricultural community, fishing community, forestry community and animal health and animal production community, etc.; **3).** Increasing opportunities for senior tourists to purchase real estate by providing good quality premises along with facilities that are favorable for senior tourists; and **4).** Promoting the development of health promotion products for senior tourists, such as beauty products, health products, spa and massage in accordance with national and ASEAN standards.

- **Action 2: Developing senior tourism events in Siem Reap**

In order to make Siem Reap stand out in receiving senior tourists, it is imperative to organize national and international tourism events. Development of senior tourism events in Siem Reap will contain activities such as: **1).** Organizing the International Senior Tourism Fair in Siem Reap and organizing the event regularly by gathering stakeholders, resort owners, tour operators, hotels, aviation, healthcare centers and real estate developers, etc.; **2).** Establishing the international conference on senior tourism that will be held annually in collaboration with the university network for senior tourism. In this sense, the Ministry of Tourism or universities in Siem Reap can become members of the university network for senior tourism; **3).** Organizing an international conference of the Association of International Universities for Third Age (AIUTA) in Siem Reap

⁶ U3As = University of the Third Age

that should be held regularly at least once a year. This conference is an opportunity to present the study tour package in Siem Reap for the elderly people; and **4).** Organizing the annual International Exhibition and Workshop on “**Health Tourism**” in Siem Reap.

- **Action 3: Facilitating senior tourists**

In order to attract senior tourists, it is necessary to take into account the facilitation for tourists, including: **1).** Facilitating long-term visas and multiple entry for senior tourists; **2).** Encouraging the development of international joint ventures in the field of medical tourism, especially the establishment of the standardized health centers, hospitals and clinics; **3).** Facilitating tourism infrastructure at tourist destinations that requires to take into account the mobility of senior tourists; **4).** Establishing a museum or demonstration of culture, traditions, religion, lifestyle, food to tourists and organizing courses for them; **5).** Establishing meditation centers in the Angkor heritage sites and Phnom Kulen National Park, etc.; **6).** Studying on preparing quality label to identify tour operators who are “**close to senior tourists**” in order to recognize who can adapt their products and services in accordance with the needs of senior tourists. This quality label will be offered to tour operators who meet the agreed criteria and they can use this label for their marketing, **7).** Establishing international cooperation between tour operators, resorts and hotels in Siem Reap with foreign tour operators and institutions that focusing on over 50 years old tourists and; **8).** Creating two or three special tourist sites in Siem Reap (one in Siem Reap city, the buffer zone and the other in the new Siem Reap tourist site).

Part 3: Strategy for Promoting Tourism and Attracting Tourists

Currently, the promotion of Siem Reap tourism is limited, in both abroad and local platform, and tourism products have not yet been diversified and designed to be attractive, despite the fact that tourism services have received a certain level of satisfaction from tourists. For the promotion of Siem Reap-Angkor, it mainly uses the existing prominent of Angkor Wat temple to attract international tourists, while other existing areas have not yet been developed and promoted.

Siem Reap tourism still needs to increase the ability for its competitive advantage by launching the master plan to attract more domestic and international tourists to visit and revisit.

According to the vision of this master plan, the promotion of tourism in Siem Reap must focus on setting out strategies that are necessary and ample to promote the tourism in Siem Reap to be a **“Quality Tourist Destination”**, including **1).** Stimulating the promotion of Siem Reap destination to be number one in the region and the world; **2).** Attracting international tourists through priority and targeted markets, as well as capturing more quality individual, family and group tourists who spend more money and stay longer in Siem Reap; **3).** Encouraging and attracting domestic tourists to travel to Siem Reap more frequently based on the **“Patriotism, knowing the Territory”** concept; **4).** Using digital technology for an effective tourism promotion; **5).** Strengthening organizational and financial mechanisms for tourism promotion in Siem Reap.

Therefore, to achieve the 2035 vision to welcome about **7 million** international tourists and about **10-11 million** domestic tourists, tourism promotion activities will be more intensified than before.

1. Attracting Major Tourism Market Sources

Siem Reap also has to consider how to attract the existing targeted market and the potential targeted market; thus, the following actions must be implemented:

- Action 1: Attracting major international tourism markets

Siem Reap has to capture Cambodia's major international tourism markets, especially the priority targeted markets, with a focus on high-potential and less-barrier markets, including: **ASEAN, China, US, England, France, Korea, Japan, Germany, Australia and Russia** by attracting as many as possible the up-market individual tourists and group tourists to Siem Reap (as shown in Figure 7 in Appendix). As tourism market's behaviors depend on external markets and are flexible and rapidly changing, Siem Reap, therefore, has to develop its **tourism promotion strategic plan**, which needs to be updated in line with actual progresses.

- Action 2: Promoting and attracting domestic tourism market

In addition to the major international tourism markets, Siem Reap has to recognize the potential of the domestic tourism movement and capture this important market share by continuing to promote mega annual tourism events in Siem Reap (e.g Angkor Sangkranta, sports events, religious events, etc.) and organize the affordable pre-arranged local tour packages with other quality diverse programs for up-market domestic tourists to encourage all Cambodians to visit Siem Reap-Angkor, using the concept of “**Being born as Khmer, come to know Angkor Wat once in a lifetime**”.

2. Multi-methods for Siem Reap Tourism Promotion

In order to increase tourism promotion in Siem Reap, it is necessary to follow the following actions:

- **Action 1: Studying and developing the institutional mechanisms to promote Siem Reap tourism**, including: **1).** Establishing the Tourism Marketing and Promotion Board (Siem Reap branch) to be a unit that manages, coordinates, promotes the marketing and promotion of tourist destinations in Siem Reap under public-private-development partner partnership; and **2).** Strengthening mechanism for collecting and analyzing tourism statistics for tourism marketing and promotion and investment.

- **Action 2: Increasing participation in tourism exhibitions or major international events and organizing study tours in Siem Reap:** **1).** Increasing participation in tourism exhibitions or international events in priority markets to promote Siem Reap tourist destination; and **2).** Increasing Familiarization Trips and Press Trips for media and tourism operators in major destinations such as Europe and ASEAN Plus Three.

- **Action 3: Studying the establishment of the Siem Reap Provincial Convention Center and support the promotion of MICE tourism:** **1).** Establishing venues for major national and international events in Siem Reap; and **2).** Increasing MICE tourism promotion to Japan, ASEAN and other markets by organizing annual meetings and conferences at small- and medium-scale and then organizing mega conferences.

- **Action 4: Promoting the investment in high-end tourism products in Siem Reap** by increasing the number of high-end resorts, hotels and restaurants to welcome up-market and quality domestic and international tourists.

- **Action 5: Strengthening tourism information distribution channel** by establishing Siem Reap Tourist Center Networks, where is a place for the collection of information of tourism products/destinations and services in Siem Reap.

- **Action 6: Increasing the publication of tourism promotional documents and materials in English, French, Korean, Japanese and Chinese;** including improving tourism maps to each destination in Siem Reap, and preparing special food directory books for each region and community, etc., and cooperating with domestic and international airline companies to promote the tourist destinations in Siem Reap (particularly to tourists traveling to Cambodia).

- **Activity 7: Improving the competitive advantage of Siem Reap destinations** through the study of Angkor ticket price policy, the study of Siem Reap Pass, and the affordable pre-arranged tour packages.

- **Action 8: Expanding the collaboration with well-known national and international TV, newspapers, magazines** to promote Siem Reap tourism to major tourism market sources, especially China and Korea.

- **Action 9: Boosting Siem Reap Tourism Promotion through the Use of Digital Technology (Digital Marketing)**

In order to increase tourism promotion activities in response to the rapid development of technology and the fourth industrial revolution (Industry 4.0), the actions to be implemented are: **1).** Promoting the use of the well-known digital tourism platforms by more creatively advertising Siem Reap tourism to the world through well-known websites, with the participation of “**goodwill ambassadors or tourism representatives**”; **2).** Studying on creating methods to encourage tourists to engage in promoting Siem Reap tourist destinations on social media (For example, building a photo booth #ILoveSiemReap and equipped with Wi-Fi at tourist destinations, etc.); **3).** Continuing to promote “**Visit Cambodia**” website and mobile application to domestic tourists that is developed by the Ministry of Tourism, in order to provide information about travel, resorts, restaurants, accommodation, shopping and other services, etc. Also, promotion of the “**Kingdom of Wonder**” website and mobile application to digitally and modernly advertise about Siem Reap tourist destinations to international tourists shall be continuously pushed; **4).** Encouraging all stakeholders to use social

media to promote Siem Reap tourism; and **5).** Encouraging the online Siem Reap tourist destinations promotional campaign by partnering with travel agencies and online traveler platforms.

- **Action 10: Studying on creating tourism branding for the major tourist sites in Siem Reap province with the use and promotion of “Cambodia: The Kingdom of Wonder-Feel the Warmth”**

Siem Reap has many potential tourist sites, in which three potential destinations need to be further studied to develop tourism brands in those areas, including: **1). Banteay Srey area** (includes Banteay Srey temple and surrounding area, which is the rural-based tourism and agro-tourism sites); **2). Phnom Kulen area** (includes natural mountains covered with green forests and other secondary areas related to nature and religion); and **3). The Tonle Sap Lake area** (such as the Tonle Sap Lake and many fishing communities at the area, are characterized as nature-based tourism and ecotourism products) (promotional brand logos are attached in Figure 8 in Appendix). The campaign to promote the mentioned three main destination brands will be advertised and displayed in each tourist destination in all forms and all ways, along with the use and promotion of “**Cambodia: The Kingdom of Wonder-Feel the Warmth**”, which is the nation main tourism brand, in order to send a message to national and international tourists who are looking for unique experiences at the priority zones in Siem Reap.

Part 4: Strategy for Strengthening Quality and Sustainability of Tourism Development

The enhancement of the quality of tourism and the sustainability of tourism development in Siem Reap is a key factor for strengthening the effectiveness of the strategic direction implementation of the master plan to achieve quality and inclusive tourist destination, that also can effectively respond to the Climate Change issue.

To strengthen the quality and sustainability of tourism development in Siem Reap, the master plan sets out the following **three strategies**:

1. Strengthening the Quality of Tourism

According to the survey, although the current tourism services in Siem Reap meet the needs of tourists and some can meet the satisfaction of tourists, but some services are still lacking and not matching with the entire needs of tourists in terms of quality and quantity, for instance, there is the lack of five-star hotels, large-scale restaurants, large-scale luxurious shopping malls to fully serve the interest of tourists. Therefore, quality improvement must be taken into account to make Siem Reap to be a high-quality tourist destination by promoting the quality improvement of all existing tourism services to ensure as required by the set standards.

Strategies to improve the quality of tourism services in Siem Reap are based on **three** approaches: **(1)-** Strengthening quality through green standards⁷ in the tourism industry in accordance with Cambodian and ASEAN standards; **(2)-** Strengthening quality through rating standards; **(3)-** Strengthening quality through law and regulations enforcement. To achieve this strategy, the following actions must be implemented:

- **Action 1: Strengthening the quality of hotels and accommodation services in Siem Reap** through **1).** Strengthening the implementation of the hotel and accommodation services rating standard; **2).** Promoting the implementation of green hotel standard.

- **Action 2: Strengthening the quality of restaurants**

Through **1).** Promoting the implementation of the “Clean Restaurant” campaign; **2).** Promoting the implementation of the Code of Conduct for the clean restaurants and food services in Siem Reap; **3).** Pushing all restaurant businesses in Siem Reap to participate in the “Clean Restaurants and Food Services” contest; **4).** Pushing all Food and Beverage businesses in Siem Reap to participate in the implementation of the restaurants and food services rating standard; **5).** Implementing food street standard and street food standard; and **6).** Promoting “Best Hospitality” contest in tourism.

- **Action 3: Strengthening the quality of adult entertainment centers in Siem Reap**

⁷ In response to the current trend of the world, Green Standard and Rating Standard need to take into account the tourism safety measures and hygiene (food) as a priority.

Through **1).** Encouraging all adult entertainment centers in Siem Reap to participate in the adult entertainment services rating standard; **2).** Promoting and encouraging investors to make efforts to develop their entertainment centers under national and international standards to attract visitors; **3).** All adult entertainment centers in Siem Reap must comply with the conditions set out in legal framework on the “**adult entertainment services rating standard**”, issued by the Ministry of Tourism to ensure quality, safety and standardized services; **4).** Adult entertainment centers zone must be established at the outskirts of Siem Reap city or any other suitable location.

- **Action 4: Strengthening the quality of tour operators and travel agencies in Siem Reap**

Through the introduction of professional code of conducts and code of ethics of tour operators and travel agents, measures to prevent the sale of Zero-Cost Tours, establishment of diversity of quality tour packages, the promotion of local products, the promotion of Cambodian tourism and participation in various tourism contests are encouraged.

- **Action 5: Strengthening the quality of tour guides**

Siem Reap needs to strengthen the implementation of the quality mechanism of tour guide service by issuing the transitional fines for tour guides who violate the tourism professional code of conducts and by introducing **the mechanism for inspecting and monitoring the performance of tour guides using the Guide Monitoring System (GMS) that scoring tour guides based on their performance.**

- **Action 6: Strengthening the quality of souvenir shops in Siem Reap**

1). Local souvenir products should obtain quality certification and Khmer products should be encouraged; **2).** Taking action against souvenir shops that participate in “**Zero-Cost tours**” activities; **3).** Utilizing the **latest technology** on all souvenir products to track shop locations, production sources, production information and to prevent counterfeit products.

- **Action 7: Strengthening Siem Reap as a Safe Tourist Destination**

1). Establishing a **Healthy Tourism System** that covers the 6 priority tourist zones; **2).** Strengthening health safety inspections at tourism establishments in Siem Reap, especially food safety and the tourism safety measures in response to

transmissible diseases (**such as Covid-19**); **3).** Strengthening the health system in response to transmissible diseases in Siem Reap such as health checks at the international gates, quarantine center, and improvement of hospitals, health centers; and **4).** Promoting the implementation of the **“Policy of Safe villages, communes and districts”** in Siem Reap province, especially in tourist destinations. This work requires an inter-institutional mechanism at both national and sub-national levels.

- **Action 8: Strengthening the resilience of Siem Reap tourism in response to disasters, transmissible diseases, and crises**

In order to ensure the sustainable development of Siem Reap as the quality and safety tourist destination, the Siem Reap Provincial Administration must develop a **“Tourism Risk Management Strategic Plan”** along with the proper implementation of responsive mechanisms to natural disasters, transmissible diseases, and crises that may occur as force majeure in a timely and effective manner.

2. Human Resource Development in Tourism

Although there are a number of tourism vocational schools and training institutions in Siem Reap provide vocational training, hospitality, food production, management skills, communication skills, foreign language, tour guides, the training still does not meet the needs of the tourism labor market in Siem Reap, which is drastically gaining from year to year due to the gap between the demand for professional staff and the supply from tourism vocational trainings. The number of staff who have obtained official trainings is still small and mostly have received peer-to-peer training and the capacity of training institution, specifically tourism vocational schools in Siem Reap, is still limited as well. According to the study, only 43% of employees in the tourism industry have received professional training and recognized by the Ministry of Tourism or the Ministry of Labor and Vocational Training. Moreover, the majority of employees have obtained professional training (only 55%), while the management level training is overwhelming (up to 60%) and the intermediate level training is very few (90% is still lacking). The staffing requirement is 75% for professional staff, 20% for middle management or supervisor and only 5% for senior management level.

Overall, challenges of the tourism professional training could be caused by a number of underlying factors such as: **1).** The capacity to accommodate students of the

Siem Reap tourism vocational schools is limited due to the high training costs, while the quality is also limited; **2).** The number of tourism vocational schools in Siem Reap is limited, in particular there is no national tourism vocational school, while students require to pay high fee for their training (on average USD 2,500 to USD 3,000 per student); **3).** Awareness raising on the benefits of tourism and tourism and hospitality professional orientation is limited; and **4).** The acquisition of digital skills associated with tourism vocational training is still very limited.

Meanwhile, the growth of tourist arrivals in Siem Reap has created more demand for human resources in this sector. According to the forecast, Siem Reap will need about **640,000 tourism employees by 2030** and **940,000 by 2035**, of which **53%** will be in the hotels and accommodations, **7%** in the food services, **7%** in the tour operators and travel agents, **2%** in the tour guide services, **6%** in the adult entertainment center services, **6%** in the community-based tourism, and **20%** in the ecotourism and other tourism businesses.

Therefore, the strategic plan for Siem Reap human resource development in the tourism sector should focus on tourism vocational training (basic and intermediate level) by increasing new skilled workforce and boosting the capacity of existing employees to obtain professional skills and to be recognized under the National and ASEAN Qualifications Frameworks. To achieve this strategy, the following actions must be implemented:

- Action 1: Increasing the supply capacity on tourism vocational training

1). Strengthening tourism vocational training in the formal classroom by maintaining the cooperation and support for the existing tourism vocational schools in Siem Reap, and in the short term, establishing a National Tourism Vocational and Creative Industry School in Siem Reap (a branch of the National Tourism Vocational School). Additionally, strengthening tourism vocational training by integrating tourism vocational curriculum into the formal curriculum in high schools; **2).** Promoting in-house training programs run by master trainers who are officially recognized by the National Committee of Tourism Professionals; **3).** Strengthening empirical training in the tourism curriculum (particularly required in the field of hotel, food and beverage management), where students must receive practical training during the study and before

their internship; **4).** Establishing an online-training in the tourism sector, including tour guides training; **5).** Implementing the Tourism Skill Development Funds to provide effective tourism vocational training in Siem Reap; **6).** Establishing study loan for tourism skills program in Siem Reap; **7).** Establishing scholarship programs or abroad exchange programs in order to study about tourism development programs, tourism marketing, international hotel management, event management and entertainment management, etc.; and **8).** Developing a mobile tourism education program on "**Quality Management and Implementation in Tourist Destinations, specifically for Community-based Tourism and Ecotourism**".

- **Action 2: Strengthening the training and organizing tourism professional development system in Siem Reap**

1). Organizing the annual tourism education and training forum in Siem Reap (associating with tourism career fairs and study tours, good practices, and demonstration of highly innovative tourism industry practices in Siem Reap); **2).** Upgrading trainers' skills in terms of new discoveries related to cultural tourism, etc.; **3).** Establishing a network of tourism professionals in Siem Reap with the participation of training institutions such as universities, colleges, training schools and private sector; **4).** Conducting an annual staff survey on the tourism curriculum to gain employees' perspective to develop training strategies in response to the tourism markets; **5).** Developing the tourism "**internship**" programs in Siem Reap; **6).** Launching the Recognition of Prior Learning projects by following the tourism professional competency-based curriculum in accordance with the national and ASEAN standards; **7).** Setting best hospitality training programs for front office employees; and **8).** Organize a national program to encourage the participation of tourism operators to implement an employee's Apprenticeship program.

- **Action 3: Strengthening the training on tourism entrepreneurship, creativity and new start-up**

Through **1).** Strengthening the entrepreneurship in the tourism sector by creating online course on tourism product innovation for tourism businesses **2).** Strengthening the capacity of tourism operators on digital literacy skills in accordance with the context of Industry 4.0 (Examples: Techniques in doing online marketing and online business);

3). Expanding the **digital skill** training for small- and medium-sized tourism operators and for the tourism vocational skills training providers in Siem Reap; **4).** Establishing a new Entrepreneurship and Start-up Training Center in Siem Reap that can be integrated with the National Tourism Vocational School and Creative Industry; **5).** Establishing technical assistance programs for starting a tourism business in the tourism and eco-tourism communities by providing them training on entrepreneurship, business creation processes, business plan development, financing and marketing techniques; **6).** Developing “**Tourism Means Business**” program for tourism operators in Siem Reap; and **7).** Organize workshops on developing package tours for the high-end market for tourism operators.

- **Action 4: Strengthening the quality of tour guide trainings in Siem Reap and surrounding area**

Through **1).** Establishing the capacity building programs through tourism vocational training courses, in which knowledge must be updated to be in line with tourism trends, including strengthening the capacity of tour guides once a year; **2).** Promoting the tour guide training in accordance with the forecast of market demand; **3).** Improving the supporting mechanism of training of tour guide training **4).** Categorizing tour guides according to each market segment; and **5).** Strengthening the tour guides’ quality by implementing of the annual “Outstanding Tour Guide Contest” mechanisms and strengthen the implementation of Guide Monitoring System, along with the study on mechanism for competitiveness in the providing service among tour guides and providing interpretation and explanation options for tourists through modern technology in order to improve the quality of tour guides in Siem Reap-Angkor area.

- **Action 5: Strengthening the registration in the National Social Security Fund for tourism employees in Siem Reap**

The obligation on registration and contribution in the National Social Security Fund is absolutely necessary for the welfare of tourism employees that relates to the occupational risk, access to health care and pension insurance which helps to alleviate difficulties such as disability, death, occupational risk, or any other contingencies including illness and maternity period, etc.

3. Strengthening the Local Economy through Tourism Development

Strengthening of the local economy through tourism is the link between the tourism development with products and services produced and provided by farmers, artisans, traders and local people. Indeed, strengthening the interaction between tourism and agriculture and the creative industries is strategically important to ensure the shared and inclusive prosperity to local people. Siem Reap needs to develop **the green belt around cities, towns and tourist destinations through crop cultivation, livestock farming, aquaculture, the promotion of handicrafts and small and medium enterprises which are essential to ensure the supply and boost local product consumption that will effectively contribute to the creation of value-added, creation of employment opportunities, and alleviation of poverty.**

Currently, there are new trends in business-orientation activities among local people and farmers living in the Siem Reap area, such as: **1). Agriculture Diversification:** Diversification of traditional crop cultivation (vegetable, fruit...), livestock farming, and aquaculture into new products with high yields, quality, safety and high value-added for tourism (enable to create a green belt); **2). Handicraft and Souvenir products** are an additional source of income.

However, the diversification of local agricultural products is still limited in terms of the quality and logistics; therefore, the local agricultural sector has not yet fully exploited the potential of supply to the tourism sector (especially, hotels and restaurants). Some handicraft and souvenir products are imported from neighboring countries or other provinces for the Siem Reap tourism industry. Therefore, the master plan calls for the implementation of **agricultural diversification linked tourism, as well as strengthening the quality and production of souvenirs for the tourism sector.**

According to the results of the Tourists and Tourism Businesses Survey in 2019, **Local Product:** Only about **42.7%** of the local produced products is used by tourism establishments. **Souvenirs:** About **46%** and **36%** of international tourists bought souvenirs as handicrafts and clothes, respectively.

To create tourism products that boost the local economy in Siem Reap, there following actions must be followed:

- **Action 1: Diversifying agriculture for tourism**

Through **1).** Agricultural diversification on vegetable and fruit crop cultivation, livestock farming, aquaculture for tourism sector in Siem Reap; **2).** Exploitation of the potential tourism market in Siem Reap for agricultural products by strengthening direct supply between farmers and tourism establishments such as hotels and restaurants, etc., which opens up opportunities for **on-site agricultural exports**. At the same time, many agricultural sites have the potential to serve as tourist products for tourists due to the growing interest for agro-tourism and rural tourism attractiveness in Cambodia. These are the interactions between the development of tourism and agriculture which complement and drive mutual growth.

- **Action 2: Developing handicrafts and souvenirs into quality “Products made in Cambodia”**

The production of handicrafts and souvenirs will be an important source of income for local people, especially in rural villages. As a world heritage site and one of the world's major tourist attractions, Siem Reap is a good place to sell handicraft and souvenir products and it can be said that this province is one of the biggest selling places in the region or country. **For handicrafts and souvenirs, Khmer products are gradually starting to replace imported goods.** However, the market with low-quality and low-cost production is already highly competitive. Therefore, the strategy for product development should focus on **high-quality handmade products or art products** in order to increase competition with imported products through the **consumption or revitalization of traditional Khmer arts and crafts, and establishment of a local brand**. While, Siem Reap currently has two major production groups, **the Institute of Khmer Traditional Textiles and Artisans Angkor**, where they have already established local brands within the international market. Thus, improving the quality or branding of other groups, especially products of the villagers, is an important strategic goal.

- **Action 3: Supporting system**

In order to achieve the concept of the above two strategies, the master plan sets out a support strategy: to establish a system to support agricultural diversification and promote local products. The support system acts as a network in the external market for

local producers called “**intermediaries**”. This system also functions as a public relations network, a source of information to producers, a consultant for improving technical and management skills. Moreover, this system serves as consultant to the Royal Government on policy, planning, legal frameworks and public investment projects in according with the evolution of local producers.

The establishment of a Khmer product brand (Ker) for tourism: The diversification of the local economy, especially in the rural economy, is an essential force to minimize the tourism development gap between urban and rural areas, which will bring economic development for the entire Siem Reap. To understand this, development directions should be studied, including: **1).** Reinforcement the interaction between tourism and agriculture; and **2).** Development of local products for the tourism sector through the improvement of handicrafts and souvenirs. To achieve this goal, it is necessary to boost promotion and expanse the supply of local products to increase the local economic benefits by developing the local product brand with diversified and high value-added products.

The establishment of an inter-ministerial mechanism by establishing an inter-ministerial working group to promote local economy: to maximize local benefits from tourism development and to narrow the gap between urban and rural economies, rural economy needs more attention and supports. Supporting activities of the Royal Government may include: **1).** Development of skills, technical, and technological to improve productivity and product quality; **2).** Development of market capacity to receive market information; **3).** Development of negotiation capacity to have better communication with buyers as well as the bargaining power; **4)** Establishment of quality local product brands in the tourism market, which includes silk, cotton, stone carvings, wood carvings, silverwares, pottery, jewelry and lacquer products; **5).** Establishment of the network of local artisans and producers and supply chain between suppliers and demanders; **6).** Currently, most handicrafts and souvenirs are made in Phnom Penh and Kandal province; therefore, establishment of mechanisms to bridge the gap between local suppliers and the potential market by establishing the network of local artisan, producers, and matching mechanisms between suppliers and demanders.

Part 5: Strategy for Managing Environment

After the rapid growth of economic activities through the growth of tourists and residents, Siem Reap currently is facing solid/liquid waste problems. The master plan also considers the issue of solid waste as a priority and addresses the growth of waste and green space in Siem Reap. The Siem Reap Environmental Management Strategy 2021-2035 will launch a new system for solid waste management in Siem Reap and hopefully that the six priority tourist areas will have a more effective environmental management mechanism. In fact, the amount of solid waste will increase in line with the growth of the “**residents and tourists**”⁸, Siem Reap will generate **821,445.96 tons/year of solid waste** in 2035, according to the solid waste generation forecast for 2021-2035.

In line with the above forecast, there also requires the **consideration of understanding and implementation of “4R”**⁹ principles among “**residents and tourists**” on solid waste discharge. We are expected to reduce the amount of solid waste to about 20% by 2035, if we successfully apply the “**4R**” principles. In this sense, residents can reduce the generation of solid waste by **14,947,398 tons/year** equal to **409.52 tons/day** by 2035, while tourists can reduce the generation of solid waste by **14,815.21 tons/year** equal to **40.59 tons/day** by 2035. Therefore, if **the implementation of “4R” principles** is succeeded, the amount of solid waste can be reduced about **164,289.19 tons/year** by 2035 (as shown in Table 8 of the Annex).

Therefore, the Siem Reap Environmental Management Strategy will define Siem Reap as a “**Clean and Green**” province, a lovely province where residents and tourists want to live and visit, with a clean environment and well-being; while Siem Reap City is a “**Clean City for All**”.

⁸ According to projected data of the Ministry of Land Management, Urban Planning, and Construction in the draft Siem Reap Province Land Use Planning (2020-2035), in third scenario, it is expected that by 2020 the population of Siem Reap will receive up to **1,167,161** and approximately **1,706,324** by 2035 (at the growth rate of 2.5% per year). At the same time, according to the forecast of the Inter-Ministerial Commission, the number tourists in Siem Reap by 2020 will be approximately **1,410,727** (**485,253 international tourists and 925,474 domestic tourists**) and approximately **18,413,140** by 2035 (**7,534,646 international tourists and 10,878,484 domestic tourists**), and the amount of solid waste discharged residents (**1.2 kg/day**) and tourists (**1 kg/day**).

⁹ “4R= (Refuse, Reduce, Reuse, and Recycle)”

1. Solid Waste Management

The concept of the solid waste management system introduced for Siem Reap is to strengthen the effectiveness of the implementation of the chain of technical system for solid waste management (based on the “4R” principles and institutional mechanisms of solid waste management in Siem Reap accompanied by the use of treatment and recycling technology) should be considered as we can reduce the pressure of landfilling and resource recovery by transforming waste into energy. Therefore, solid waste management in Siem Reap must follow the below actions:

- Action 1: Establishing a solid waste management system in Siem Reap

Priority measures for solid waste management in Siem Reap through 1). Implementing the “4R” principles along the chain of technical system for solid waste management in Siem Reap, including the minimization of the amount of garbage as much as possible by implementing measures at Upstream and requirements of recycling recyclable waste at landfills at Downstream; 2). Establishing the institutional mechanism to implement the solid waste management system in Siem Reap 2021-2035 through the introduction of a **new mechanism (including the study to establish “the Siem Reap Solid Waste Management Authority” who is in charge of the Upstream and the “the Final Disposal Management Authority” who is in charge of the Downstream, both are decided by the sub-decree of the Royal Government of Cambodia)**; and 3). **Preparation of a new landfill** at a suitable location in Siem Reap¹⁰. In the medium term, Solid waste management system in Siem Reap is designed to be consistent from the upstream¹¹ to the downstream¹² (the solid waste management structure as shown in Figure 9 of the Annex).

- Action 2: Using digital technology in solid waste management in Siem Reap

¹⁰ Currently, the 8-hectare landfill is located in Anlong Pi village, Trapeang Thom commune, Prasat Bakong district, about 20 km from Siem Reap city.

¹¹ **The upstream management:** Solid waste management from the source of waste generation, collection, transport, management of transfer stations should be under the control of the **Siem Reap Solid Waste Management Authority**, which is under the control of the Siem Reap Provincial Administration.

¹² **The downstream management:** landfill management, resource recovery, and recycling of solid waste to energy, etc. should be under the control of the **Final Disposal Management Authority**, which has the mandate of inter-institutional management to be consistent with public administration management.

In fact, a number of techniques have contributed to solving global challenges in solid waste management that should be studied and implemented in Siem Reap, these include: 1). Tracking and the garbage payment services via digital technology; 2). Using the GPS system for tracking garbage collection to increase efficiency in waste management, as well as software that shows users the location of garbage collection vehicles on the system easily¹³; 3). Creating an online garbage market platform for trading recyclable waste; And 4). Applying the technology to track and control illegal dumping, etc.

- **Action 3: Establishing a financial system to protect the environment in Siem Reap**

Through 1). Establishing a financial sustainability through a joint fee collection system to strengthen financing for solid waste management in Siem Reap; 2). Improving garbage fee collection capacity and tax revenue of the provincial administration (as shown in the table 9 of Appendix).

- **Action 4: Strengthening the “Clean City, Clean Resort, Good Service, and Best Hospitality” contest movement**

Through 1). Continuing to promote the “Clean City”, “Clean District”, and “Clean Downtown” contest movement; 2). Promoting the “Clean Living” and “No Plastic Bag” campaign at major tourist sites such as Angkor Heritage Site, Phnom Kulen National Park, and Outstanding tourism business establishments in Siem Reap; 3). Strengthening the participation in the “Clean City, Clean Resort, Good Service, and Best Hospitality” contest movement; and 4). Promoting the eco-friendly tourism businesses through the “Samdech Techo Prime Minister Eco-Business Awards” standard.

2. Promotion of Green Areas

According to the “Clean City” standard, green area management is an important part of supporting the clean environment. Garden improvement in Siem Reap and the establishment of tourist park are important tasks to promote green areas. To achieve this strategy, the promotion of green areas must follow the below actions:

¹³ Currently, Cambodia has **Smart Bin** technology that should be used in Siem Reap tourist destinations. Smart bin is bin that have sensors to determine the type of garbage and can alert the users when the bin is full.

- **Action 1: Improving the gardens and conserving the large tree in Siem Reap City**

By establishing a project to conserve the old trees along the road in the center of Siem Reap City, using practical methods (such as identification, inventory, design and protection with specific measures) as well as the protection of forests in the Angkor heritage area.

- **Action 2: Developing the “Tourist Park”**

Through the launching of “**One Tourist, One Tree**”, “**A couple, One Tree**”, “**One Youth, One Tree**” campaign, etc.

3. Protection of Natural Ecosystems

To support the development of tourism in Siem Reap in the future, it is necessary to jointly strengthen the protection of the environment and natural resources, especially the protection of natural ecosystems in the major tourist areas of Siem Reap; in particular, the Tonle Sap Lake. To ensure the sustainability of the natural ecosystems, the following actions must be taken into account:

- **Action 1: Strengthening and expanding the roles, duties, and responsibilities of the provincial administration on the management, protection and conservation of floodplain and flooded forests.**

Mobilizing the participation of all stakeholders “**Public-Private-People/Tourists-Development Partners**” to cooperate in the prevention of natural resource crimes that affect the floodplain and flooded forest in Siem Reap, especially in the Tonle Sap Lake area. Strategic actions for this work include: **1).** Integrating the awareness-raising and disseminating the benefits of natural ecosystems; **2).** Strengthening the implementation of necessary laws and regulations for the conservation of natural ecosystems in Siem Reap; and **3).** Cooperating with ministries, institutions, national and international organizations and stakeholders to conserve the natural ecosystems.

- **Action 2: Establishing an inter-institutional mechanism to coordinate, protect and address the challenges of natural ecosystems.**

By establishing **an inter-ministerial working group to manage and develop community-based tourism and ecotourism** as an executive body unit of the Royal Government in coordinating, protecting and addressing the challenges of the natural

ecosystem in Siem Reap, especially in the Tonle Sap Lake area. This inter-ministerial working group shall establish monitoring and controlling mechanism along with key indicators and develop semi-annual and annual progress reports.

Part 6: Strategy for Developing Infrastructure and Enhancing Tourism Support Connectivity

Tourism development in Siem Reap (towards 2035) needs to be linked with infrastructure development and strengthen connectivity. Presently, Siem Reap is very favorable for attracting tourists and investment due to its existing connected infrastructures by water, land and air.

The followings are the actions and strategies for infrastructure development and strengthen connectivity in Siem Reap to support the tourism development in Siem Reap 2021-2035:

1. Promote Internal and International Connectivity

In order to support the tourism development in Siem Reap in line with the aforementioned vision, the master plan requires the consideration of promoting connectivity to Siem Reap in terms of international and internal connectivity.

1.1 Promote International Connectivity to Siem Reap

The Siem Reap International Airport does not have the capacity to accommodate the large-aircraft and direct flights from the European market, making it difficult for long-haul international tourists from the European and American markets. Sometimes, this requires flight transfer in Bangkok or Ho Chi Minh City or Singapore, taking a lot of time before arriving to Siem Reap. To promote international connectivity in Siem Reap, there must follow the actions below.

- **Action 1: Strengthening the capacity of national airlines** to be able to fly to the priority markets, both the regional and long-haul tourism markets.
- **Action 2: Strengthening and increasing more short-haul direct flights for international tourists (especially, tourists from ASEAN, China, Japan, Korea)** to Siem Reap: by considering the adjustment of landing fees and/or extending the longer

landing time with no fees in order to encourage and attract more airlines to fly to Siem Reap International Airport.

- **Action 3: Organizing the long-haul direct flights for international tourists** through **1)**. Strengthening the capacity of Siem Reap International Airport by firmly monitoring the technical conditions of the landings associated with the current capacity of the airport, and the technical conditions of the vibrations to the temples that set by the APSARA Authority to increase the feasibility of the flight, large-aircraft landing (Code E or F) in the future; and **2)**. In the medium- and long-term, the operation of a new airport in Siem Reap that can receive tourists according to the forecast of the Siem Reap Tourism Development Master Plan in 2035.

- **Action 4: Facilitating the travel and transportation of tourism to be flexible and easy** through **1)**. Increasing the better facilitation of travel through international gates; **2)**. Facilitating the travel for tourists from neighboring countries, especially by land, by allowing the use of vehicles to enter-exit Siem Reap more easily and facilitate the travel visa for tourists by enabling the use of border pass to visit Siem Reap.

1.2. Promote Internal Connectivity to Siem Reap

It is important to take into consideration the infrastructure development of lands (roads), airways (Phnom Penh-Siem Reap, Siem Reap-Sihanoukville, and waterways (Phnom Penh-Siem Reap). At the same time, there must consider the railway connectivity (Siem Reap-Phnom Penh, Siem Reap-Sihanoukville, and Siem Reap-Banteay Meanchey-Poipet to Thailand) in the future.

In order to promote internal connectivity to Siem Reap and increase the attractiveness for domestic tourists, it is necessary to follow the below actions:

- **Action 1: Strengthening the flight connectivity for domestic tourism**

By increasing the domestic airlines flight capacity, there must be connecting flights between Siem Reap-Phnom Penh and Siem Reap-Sihanoukville at affordable prices.

- **Action 2: Strengthening the land connectivity (roads), connecting with destinations and other world heritage sites of Cambodia**, aiming to create the tourist routes for domestic tourism and Self-driving tourism.

- **Action 3: Strengthening the infrastructure and creating a good experience on the tourist routes** through **1).** Creating the diverse and attractive tourism products on the tourist routes, **2).** Establishing the rest station on the tourist route; **3).** Continuing to strengthen traffic safety; **4).** Installing the traffic signs and information signs on the roads that connect all tourist destinations, designed by using new technologies in the context of Industry 4.0; **5).** Strengthening the Traffic Management Plan at tourist destinations by the implementing and disseminating the traffic laws for tourists properly and comprehensively; **6).** Facilitating the entry-exit procedures of tourist vehicles, especially family vehicles to Siem Reap through the establishment of a tourist facilitation center at the international gateway connected to Siem Reap; and **7).** Should facilitate the Access-Pass through the use of Border-Pass for tourists (Thai-Lao) who are living in the border provinces of Cambodia to visit Siem Reap.

- **Action 4: Increasing the capacity of future railway connectivity**, there is a must to take into account the high-speed rail connecting from Siem Reap-Phnom Penh or Siem Reap-Sihanoukville, and conducting feasibility study on electric train connect to the six priority tourist destinations in Siem Reap in the long-term.

2. Maximize the Improvement of the Tourism Supporting Infrastructure

To support tourism development in Siem Reap, the supported infrastructures (water, electricity and telecommunications-internet services) are significant for Cambodia's tourism sector as well as Siem Reap.

2.1. Development of Clean Water Infrastructure for Tourism in Siem Reap

The demand for clean water for the residents and tourists in Siem Reap has significantly increased, which is the reason why the Siem Reap Water Supply Authority and the Siem Reap Provincial Administration have been trying to mobilize investment to continue the water supply capacity in line with the growth of all forms of development, including the investment in the construction of water treatment plant, the installation of pipelines and the distribution of clean water to expand the scope.

Meanwhile, the demand for clean water in Siem Reap from 2021 to 2035, based on the estimation of the Siem Reap Water Supply Authority, the average amount of clean water consumed by tourists is **400 liters/person/day**, more than double compared

to the residents (**157 liters/person/day**). However, the clean water demand from tourists varied seasonally. Thus, it is estimated that a tourist consumes **400 liters/person/day** of clean water; in the medium term and long term, the amount of clean water consumption is **352 liters/person/day** and **300 liters/person/day**, respectively. This depends on the year-to-year decrease of the consumption of clean water by tourists as well as the residents through the understanding of water-saving consumption, including the use of technology to help the minimize water loss (detailed data as shown in the table 10 and 11 of the Annex).

In contributing to the achievement of the vision of Siem Reap tourism development in 2035, as well as to meet the demand for clean water for tourism sector, it is necessary to develop clean water infrastructure to for tourism sector in Siem Reap by following the below actions:

- **Action 1: Maintaining the water resources for clean water supply**

By **1)**, Improving the water supply in Siem Reap city is necessary to improve the existing amount of water reservoirs and in the future for water in the Tonle Sap Lake to meet future water demands; and **2)**, Conserving the water resources to be more efficient, plan is needed for the development of the whole river/stream basin as well as the groundwater storage area.

- **Action 2: Improving the cleanliness of rivers and water environment**

The maintenance of water quality, it is necessary to consider cleanliness and hygiene by establishing a sustainable restore and maintenance program in Siem Reap for the sake of tourism and as a source of clean water supply.

- **Action 3: Improving the water supply services to expand the scope of water management to consumers**

Through the planning of strategic management and water consumption in Siem Reap (2021-2035), there the sustainability and management system of water resources must be monitored, as well as the use of water both on surface water and groundwater, in order to respond to the growth in consumption of water by the residents, tourists, other consumptions, and also to preserve the temples in the Angkor heritage site.

2.2. Development of Power Infrastructure for Tourism in Siem Reap

The power sector plays the salient role in supporting development of all sectors, ensuring the electricity supply with quality, stability and serving people's livelihoods and economic development through investment promotion, job creation, local development and contribution to poverty reduction.

With the hypothesis, the electrical power consumption of tourists is divided into **three stages**: **1).** In the short-term from 2021-2023, tourists consume 29.42 kilowatts/person/day of electrical power; **2).** In the medium-term from 2024-2030, tourists consume **25 kilowatts/person/day** of electrical power; and **3).** In the long-term from 2031-2035, tourists need to consume **22 kilowatts/person/day** of electrical power, due to the reduction of electrical power consumption from time to time, which shows the energy-saving of tourist consumptions and the consumption of energy-saving technology of tourism businesses. Therefore, the forecast demand of electrical power consumption in tourism from 2021 to 2035 in Siem Reap is (as shown in table 12 and 13 of the Annex).

The master plan encourages Electricite Du Cambodge (EDC) to develop a clear strategic plan for the management and consumption of electrical power in Siem Reap 2021-2035 in line with the vision by achieving **100%** of electricity supply throughout Siem Reap by 2035. It also encourages consideration on the green energy consumption and the renewable energy consumption, such as solar energy, to ensure the stability, quality and sustainability of the electricity supply.

2.3. Improvement of Road Infrastructure Connecting to Tourist Destinations to be Worthy of “Tourist Routes”

According to the results of the international tourist survey of Siem Reap in 2019, about **3/4** suggested to improve the road infrastructure in Siem Reap, while the suggestion to develop sidewalks for tourists is about **73%** and about **2/3** suggested to improve the parking lots and public toilets. To meet the needs of tourists and the needs of the tourism industry in Siem Reap, the actions below must be undertaken:

- Action 1: Improving road infrastructures in Siem Reap City

To improve the road infrastructure in Siem Reap City, the Royal Government of Cambodia has established an inter-ministerial commission through the Royal Government's Decision No. 90 SSR, dated 8th September 2020, on the establishment of

an inter-ministerial commission to study and implement of 38-urban roads infrastructure renovation project in Siem Reap province, with **Samdech Pichey Sena Tea Banh, Deputy Prime Minister, Minister of National Defense, as the chairman of the 38-urban roads¹⁴ infrastructure renovation project in Siem Reap**. In order to improve the above urban roads to be the tourist road that can serve the travel of residents and tourists, each road must take into account: **1).** Roadway for all kinds of vehicle traffic; **2).** Walking Streets; **3).** Lanes for motorcycles; **4).** Lanes for cycling; **5).** Lanes for disability; **6).** Sidewalk's Parks; **7).** The installation of necessary tourism facilities. This infrastructure project must have a separate detailed master plan.

- **Action 2: Expanding and improving the access roads to priority tourist areas**

By implementing the construction of the expansion and improvement of access roads to priority tourist sites in Siem Reap, such as **1).** Constructing the Angkor Kyung Yu Road (60m Street) connecting to N.66 road and continuing to the district road of Kantraing commune, (approximately 6.6 km) to connect the new Siem Reap tourist area and Siem Reap-Angkor International Airport to Siem Reap City; **2).** Expanding and improving the existing roads such as N.66 road, N.64 road, Malay road, Samdech Techo Strategic Road (Police School road); **3).** Expanding and improving the existing district roads connecting to Banteay Seri tourist sites about 4 km in length from the intersection of Phnom Kulen roundabout; **4).** Expanding and improving the existing district roads to the new Siem Reap tourist area about 25 km in length from the intersection of N.6 road at Angkorng market of Angkor village to the foot of Phnom Kulen; **5).** Expanding and improving the existing district road to Tonle Sap Lake tourist area; **6).** Expanding and improving the existing district road to Phnom Kulen tourist area.

2.4. Strengthen the Telecommunication and Broadband Internet Services for Tourism in Siem Reap

¹⁴ Construction of 38 city-roads infrastructure shall be divided into 8 types: (1: the first section of city ring road has a width of 15.5 meters; 2: the second section of city ring road has a width of 19.1 meters; 3: Road with a width of 14 meters; 4: Road with a width of 12.1 meters; 5: Road with a width of 9 meters; 6: Road with a width of 18.1 meters; 7: Walking Path along the canal; 8: Siem Reap Riverside Walking Path (Source: the inter-ministerial commission to study and implement of 38-urban road infrastructure renovation project in Siem Reap paper)

The seizure of technology and broadband internet services in Siem Reap is a strategic option that benefits all business operations in the tourism and related sectors, especially in line with the trend of digital marketing strategies linking tourism. Cambodia currently has a Cambodia ICT Master Plan 2020¹⁵ and the telecommunications and information technology development policy towards building “**Cambodia 4.0**”. For Siem Reap, the strengthen of telecommunication and broadband internet infrastructure has served as an important source of tourism and a driving force for the province to embrace digital tourism products, which can enhance the competitiveness of Siem Reap's tourism, including 5G technology, Web and Mobile applications, Big Data technology, Internet of Things, Blockchain, Artificial Intelligence, and other technology platforms to meet the needs of tourists in the era of the Industrial Revolution 4.0¹⁶. Thus, strengthening the infrastructure of telecommunications and broadband internet services for the tourism sector in Siem Reap must follow the below actions:

- **Action 1: Expanding the provision of broadband internet service in priority tourist sites in Siem Reap province** by promoting the installation of telephone and internet antennas in all priority tourist sites, linking the use of current high-speed technology, such as 4G and 5G technology.

- **Action 2: Installing the Free Wi-Fi** in the Angkor Heritage area and in some major tourist resorts in Siem Reap. The installation of Wi-Fi is to responses to the current needs of domestic and international tourists, and to assist the digital marketing strategy to promote Cambodia tourism.

- **Action 3: Capturing the growth trend of the sharing economy in Siem Reap tourism services**

An important highlight of the sharing economy is that the system allows individuals to earn a living from their limited possessions, such as houses, cars, bicycles,

¹⁵ *The Cambodia ICT 2020 Master Plan* aims to make Cambodia a smart society and a smart government thanks to the use of information and communication technology. This master plan has 3 main objectives: **1).** To ensure national connectivity with a strong IT infrastructure, legal framework and cyber security; **2).** To provide innovation through investment in the ICT industries and digital research and development; **3).** Increase e-services such as e-government services, e-public services, e-economy services, and e-education services. In addition, the Royal Government has also set out the telecommunications and information technology development policy.

¹⁶ According to the Cambodia 4.0 Center's "Cambodia 4.0" White Paper

motorcycles, etc. by renting to others for sharing. And those who do not have these possessions can rent it to use at a reasonable price and saving price. Information technology enables companies to create smart applications to connect between needy and the tenants, ensuring security and online payment methods. Siem Reap's tourism sector needs to embrace the sharing economy model such as accommodation booking App, Passenger transporting App, online food shopping App¹⁷, etc.

- Action 4: Embracing the digital technology for tourism management and development

Siem Reap embraced the digital technology for the management and development of tourism in the six priority tourist destination sites by nursing to the specific characteristics and identities of each tourism product and by enabling the use of the type of technology that suits the needs, such as **1).** Speedy modernization of technology in the Angkor heritage site to ease congestion and the influx of domestic and international tourists, as well as the provision of unique and innovative tourism services; **2).** Management of tourism destinations and analysis of tourism data in Siem Reap to increase the promotion and investment of tourism and the needs of the target tourism markets; **3).** Development of mobile applications and digital technology for the supply and consumption of tourism services in Siem Reap; **4).** Promotion of Siem Reap tourism through digital technology; and **5).** Expansion of supported digital infrastructure, etc.

The identification of digital technologies for tourism products in Siem Reap shall be considered and decided based on the actual situation and will be reviewed and decided by the relevant ministries, institutions and authorities according to the actual project.

¹⁷ Example:

- Accommodation Booking App (e.g. Airbnb) is a digital platform that allows individuals who own homes and rooms for rent, to advertise their properties renting through this platform, and the needy can use this platform to search for a room or accommodation. Airbnb currently has about 4 million rental units, equivalent to about 1/4 of the total rental units worldwide.
- Passenger Transporting App (e.g. UBER, Grab, or Passapp) is a digital platform that allows individuals to advertise the renting of vehicles, taxis and pay online, and those who need vehicle rentals, taxis can easily find and rent it.
- Online food shopping App, etc.

Chapter 3

Action Plan and Governance Supporting Tourism Development in Siem Reap

Part 1: Action Plan Supporting Tourism Development in Siem Reap

Part 2: Institutional Mechanism

Part 3: Financial Mechanism Supporting Tourism Development in Siem Reap

Part 4: Capacity Building

Part 5: Monitoring and Evaluation Mechanism

Chapter 3: Action Plan and Governance Supporting Tourism Development in Siem Reap

Tourism Development Master Plan in Siem Reap 2021-2035 sets out a vision for tourism development in Siem Reap toward a quality tourism destination. This is the main reason to determine that the current tourism development in Siem Reap as well as in the future needs to include the two main approaches as follows:

- **Sustainable and inclusive development:** ensure a balance between economic efficiency (development), social (opportunities for all) and environment (protection and preservation of the environment) at destinations with long term vision by considering the next generation in line with the Royal Government of Cambodia vision 2050 “**Cambodia will become a high-income and developed country by 2050**”.
- **Integration:** tourism development in Siem Reap “**in line with the concept of tourism as a cross cutting sector**” which requires complementary and integrated implementation of functions with harmony and equity and can also reduce potential conflicts among activities and stakeholder. This requires the approach of **Public-Private-People-development Partner Partnership** in management and development of tourism in Siem Reap.

Furthermore, every effort to lead tourism development in Siem Reap should reflect the level of priority of action plan in accordance with the level of the priorities of projects and policy and rectangular strategy of the royal government of Cambodia phase II. Therefore, to implement the tourism development master plan in Siem Reap 2021-2035 short-, medium- and long-term action plans need appropriate **institutional mechanisms, governance** with sufficient capacity and capabilities accompanied by **financial mechanisms** and **monitoring & evaluation mechanisms**.

Part 1: Action Plan Supporting Tourism Development in Siem Reap

To effectively implement the strategic goals of the tourism development master plan in Siem Reap 2021-2035, it requires a definite action plan divided as short-, medium-, and long-term in accordance with defining the responsibility of operational

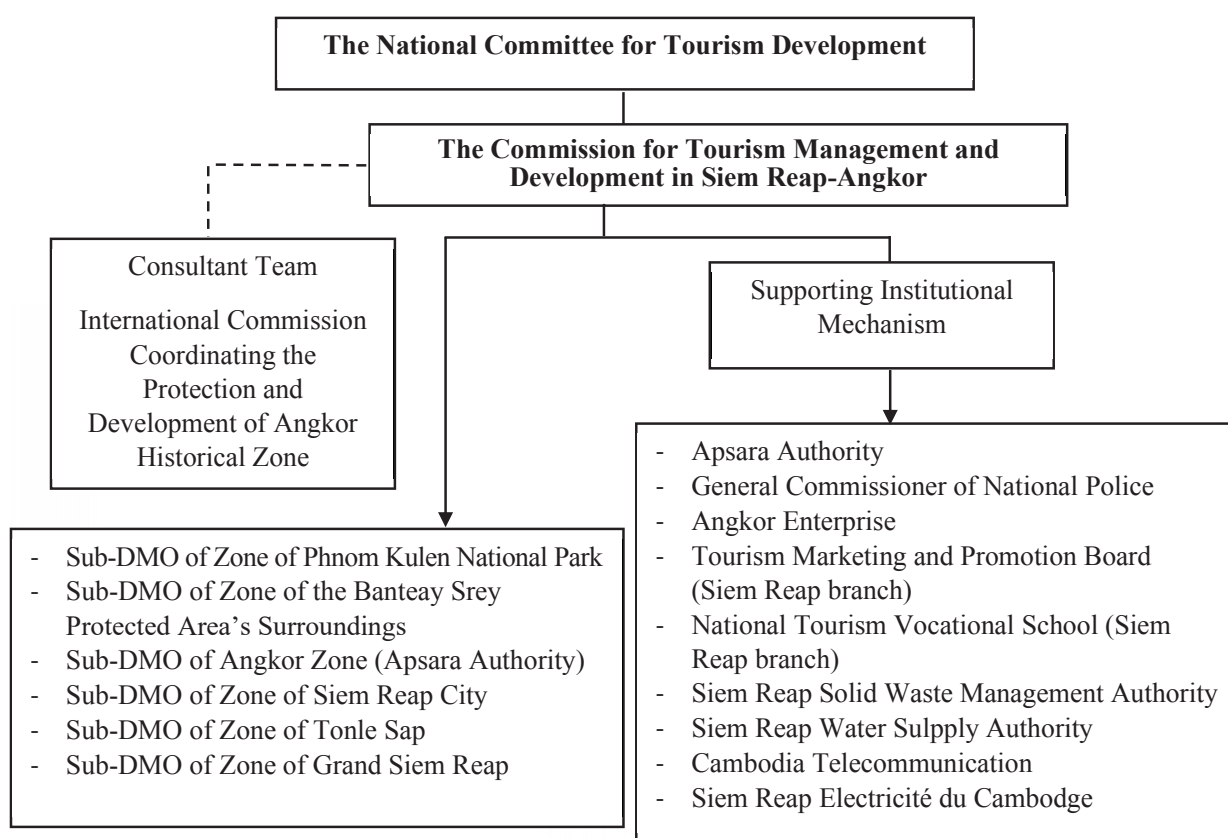
institution and implementation budget. The action plan needs to set out a list of detailed action plan with 20¹⁸ priority projects in order to support tourism development in Siem Reap toward 2035. The action plan shall be set out by the decision of the National Committee for Tourism Development according to the request of the tourism minister and the chairman of the inter-ministerial commission to study and develop the tourism development master plan in Siem Reap. The action plan can be updated in accordance with the actual situation of tourism in Cambodia as well as in Siem Reap, if necessary.

Part 2: Instructional Mechanism

1. The Main Institutional Mechanism

The main institutional mechanism in management and development of the tourism sector in Siem Reap to implement the tourism development master plan in Siem Reap 2021-2035 has structure as follows:

Structure of Siem Reap-Angkor Tourism Destination Management



¹⁸ 20 priority projects are in the document of “Action plans of Tourism Development Master Plan in Siem Reap 2021-2035”

(Source: Inter-Ministerial Commission)

Note: ICC-Angkor is a consultative mechanism for projects related to World Heritage sites (Archaeological sites in Phnom Kulen and Siem Reap lake) and other heritage sites to ensure the value of Angkor site)

The Siem Reap tourism management and development for 2021-2035 shall be led and coordinated by the **“Commission for Siem Reap-Angkor Tourism Management and Development”** which is the Destination Management Organization (DMO) as well as creating sub-DMOs at the six tourist destinations.

- **The Purposes of Creating DMO**

To “increase competitiveness and ensure sustainability” from tourism development in each priority destination. DMO and Sub-DMOs’ creation is based on four approaches in accordance with sound recommendations of **Samdech Akka Moha Sena Padei Techo Hun Sen, Prime Minister of the Kingdom of Cambodia** at the opening ceremony of the World Conference on **Tourism and Culture: Building a New Partnership** at Le Meridien Angkor Hotel, Siem Reap on the February 4th, 2015; **“International cooperate”** in order to promote sustainable cultural tourism development. In the sense, four basic elements must be emphasized: **(1).** Promoting investment and developing innovative and memorable cultural tourism products for tourists as well as increasing marketing and promotion; **(2).** Strengthening the quality of cultural tourism products; **(3).** Adopting innovative technologies in tourism and culture; **(4).** Improving synergy between tourism and culture.

- **Structure of Siem Reap DMO**

To support Siem Reap tourism development: good governance mechanism of Siem Reap DMO, namely the **“Commission for Siem Reap-Angkor Tourism Management and Development”** with the present of Sub-DMOs at the six priority destinations such as **(1).** Sub-DMO of Zone of Phnom Kulen National Park; **(2).** Sub-DMO of Zone of the Banteay Srey Protected Area’s Surroundings; **(3).** Sub-DMO of Angkor Zone (Apsara Authority); **(4).** Sub-DMO of Zone of Siem Reap City; **(5).** Sub-DMO of Zone of Tonle Sap; **(6).** Sub-DMO of Zone of Grand Siem Reap. Besides,

Apsara Authority is responsible for the Angkor heritage DMO based on the royal decree No. 001/NS of 08 March 1994 concerning the zoning and management of the region of Siem Reap/Angkor.

The “**Commission for Siem Reap-Angkor Tourism Management and Development**” will be set by sub-decree of the royal government and the commission will create Sub-DMOs for the six priority destinations.

- **Form of Sub-DMOs**

The Sub-DMOs for the six priority destinations will be created under the aims of tourism management and development with quality and sustainability. The organization’s form needs to emphasize a development model of participation from public, private, community, people, and development partners.

The two types of DMO’s form:

- **Type 1:** Stated-controlling
- **Type 2:** Multi-partner controlling (**public-private or public-private-community or public-private-people-community-development partner**).

2. Supporting Institutional Mechanisms

To support the implementation of the roles and responsibilities of mechanisms and processes of Sub-DMOs of each priority destination the master plan requires supporting institutional mechanisms such as: **1).** Angkor Enterprise; **2).** General Commissioner of National Police; **3).** Tourism Marketing and Promotion Board (Siem Reap branch); **4).** National Tourism Vocational School (Siem Reap branch); **5).** Siem Reap Solid Waste Management Authority; **6).** Siem Reap Water Supply Authority; **7).** Siem Reap Electricité du Cambodge; **8).** Cambodia Telecommunication and **9).** Tonle Sap Authority.

Meanwhile, in the process of Siem Reap tourism development, the master plan encourages a consultation mechanism with the participation of the private sector, development partners especially the International Commission Coordinating the Protection and Development of Angkor Historical Zone.

Part 3: Financial Mechanism Supporting Tourism Development in Siem Reap

To ensure the sustainability of the tourism development in Siem Reap, the royal government will conduct a comprehensive study to identify the budget and potential financial sources for supporting the implementation of the master plan. It can be financed by **government budget, private sector and development partners**.

1. Budget and Financial Sources Supporting the Tourism Development in Siem Reap

We have examined the possibility of the budget and financial sources as follows:

- **First, government budget for the tourism development in Siem Reap**
 - ❖ Annual budget of the government
 - ❖ Angkor preservation fund coming from Angkor pass sales
 - ❖ Environmental funds coming from carbon credit sales, waste recycling or waste collection fee from households, small and large business establishments etc...
- **Second, budget and financial sources from private sectors both local and foreign business**
 - ❖ Tourism investment by local investors
 - ❖ Foreign direct investment (FDI).
 - ❖ Public-Private Partnership (PPP) under the form of revenue-based payment financing for revenue projects such as airports, roads, ports, etc... (which bring revenue during operation after the construction and can be used to return the investment), availability-based payment financing (for social work projects such as hospitals which cannot bring revenue during operation after the construction and requires to use the national budget to pay for the investment), or hybrid payment financing (mostly mixed projects such as hospital that after the construction can bring operational revenue from the rich and requires to use the national budget to pay for the poor).
- **Third, budget and financial source from development and dialogue partners**

- ❖ Grant
- ❖ Concessional loan financing
- **Fourth, legal sources of budget and financing**

2. Budget Source of the Revenue - National Budget from Tourism

- Budget source of existing tax revenue by strengthening and expanding the capacity to collect taxes effectively and efficiently and / or additional taxable
- Non-fiscal sources of budget including revenue from sale or lease of public resources / assets, revenue from ticket sales to the Angkor Archeological Park and possibility to earn income from ticket sales for other potential resorts in Siem Reap (such as Phnom Kulen national park, Tonle Sap Lake etc...), sources of budget from fees of tourism activities at priority tourist destinations and other public services fees etc...
- Source of the government's financing formula under which carried out so far in line with the concept **“take palm leaves and pack palm sugar for Siem Reap development”** to be a budget package for public investment to support the development of tourism in Siem Reap
- Legal sources.

Part 4: Capacity Building

To effectively implement the Tourism Development Master Plan in Siem Reap 2021-2035, there must be a capacity building program through training for officials involved in the implementation of the master plan at both national, sub-national and local level (each Sub-DMOs). The training program, capacity building and awareness raising of key principles of tourism development in Siem Reap must focus on:

- Training planners and policy makers, in particular training for technical officers of relevant ministry-institution and Siem Reap Provincial Administration in the Siem Reap tourism development process.

- Training destination managers, private sectors and tourists to understand about tourism conservation and development in Siem Reap in line with the principle of sustainable and inclusive
- Training relevant tourism professional as stated in the action plan of the Strategy for human resource development in tourism in Siem Reap
- Creating the **National Forum on Tourism of Siem Reap** to be held annually to strengthen exchanges and disseminate new experiences, knowledge, skills, specialists and tourism products.

Part 5: Monitoring and Evaluating Mechanism

The master plan is considered as a living document that needs to be updated continuously in a new context in accordance with the regional and global tourism trends that are flexible and highly variable, for example the impacts of Covid-19 which is the biggest unprecedented impact in the last 30 years.

The tourism development master plan Siem Reap 2021-2035 will be monitored and evaluated by the **National Committee for Tourism Development** that the **Commission for Tourism Management and Development in Siem Reap-Angkor** is an assistant of the committee to develop key indicators for monitoring and evaluating the implementation of the strategic and action plan of the master plan and formulating semi-annual and annual reports for the committee. To increase the effectiveness of the implementation, the master plan calls for an annual **national forum (government level) on tourism of Siem Reap in December**.

Meanwhile, the evaluation of the master plan implementation for the mid-term review will be held in 2028 with the purpose of understanding its effectiveness and identifying challenges of implementing the action plan of the tourism development master plan Siem Reap 2021-2035 and:

- To review the progress of the implementation of the action plan of the master plan

- To review development plans in each priority destination operated by Sub-DMOs and updating development plans to include priority projects if necessary.

In case of risk or crisis caused by force majeure and affecting on tourism development such as infectious disease crisis, economic crisis, climate change, natural disaster and other crises which can make changes to forecast and calculate scenario each year as expected.

Conclusion

The tourism sector in Siem Reap has been going through a long development phase and a lot of flexibility and the Royal Government has been putting efforts on sustainable and responsible development with proud achievements. **“The tourism development master plan Siem Reap”** defining long-term tourism vision for 15 years is worthy because recently international tourist arrivals in Siem Reap faced a slow growth and even slightly declining in 2019 while the tourism at the national level continued to grow. Meanwhile, in 2020, the tourism sector of Cambodia and Siem Reap have been severely affected by the Covid-19 pandemic. **“The tourism development master plan Siem Reap”** prepared with harmonization between all relevant sectors, accompanied by a comprehensive monitoring and evaluating mechanism of all tourism development activities is a vital tool and a road map that lead public, private, people and development partner to participate in socio-economic development to achieve the vision Cambodia becoming a middle-income country by 2030 and developed country by 2050.

The master plan will actively contribute to the implementation of the rectangular strategy phase IV of the government and national policy on Cambodia tourism to make Cambodia-world class tourist destination with high quality, provide warmth and improve the well-being of tourists, in which Siem Reap must be developed into a **“Quality Tourist Destination”** that **can regain its pride as the main tourist destination of Cambodia as well as ASEAN region.**

To achieve the vision of this master plan, it is necessary to mobilize resources at the national level through establishing an appropriate administrative structure and mobilizing necessary tourism investments to organize tourism urbanization, new tourism products development, tourism human resources and tourism promotion strengthening and improving connectivity to Siem Reap. This requires the participation of all stakeholders based on a quadrilateral’s partnership approach **“Public-Private-People-Development Partner”**. The role of Cambodia’s Royal Government is to set out the direction of development policy, develop regulations and management procedures requiring the six priority tourist destinations of Siem Reap to have clear management mechanisms in the form of each **Sub-DMOs**, accompanied by support for

tourism investment, infrastructure construction and necessary coordination. **Private sector** has the role in investment, job creation and sustaining economic activity in accordance with market principles. Whereas the role of **the people** is to contribute to monitoring the accuracy and accountability in the system of governance and the functioning of the private sector as well as cultural conservation, environmental protection and maintaining public order, etc. In addition, all Khmer people must put the efforts to increase and update their knowledge and professional skills, both soft and hard, in line with the actual period and context of the development in order to make the most out of Cambodia tourism development. **Tourists** also have an important role and must be a responsible tourist. In addition, **development partners** play an important role in promoting the successful implementation of **the Tourism Development Master Plan Siem Reap 2021-2035** both within the framework of providing technical support, expertise and development financing.

The purpose of this master plan is to indicate that all relevant ministries and institutions need to develop strategic plan and detail development programs to support the tourism development in Siem Reap 2021-2035. At the same time, it also requires a favorable environment for the implementation of the action plan of the master plan, as well as to intervene and solve some inactive issues when it needs to ensure that all stakeholders can actively participate in tourism development activities, with an equitable fruits sharing of sustainable tourism development “**without leaving anyone out of development**”.

Appendix

Appendix

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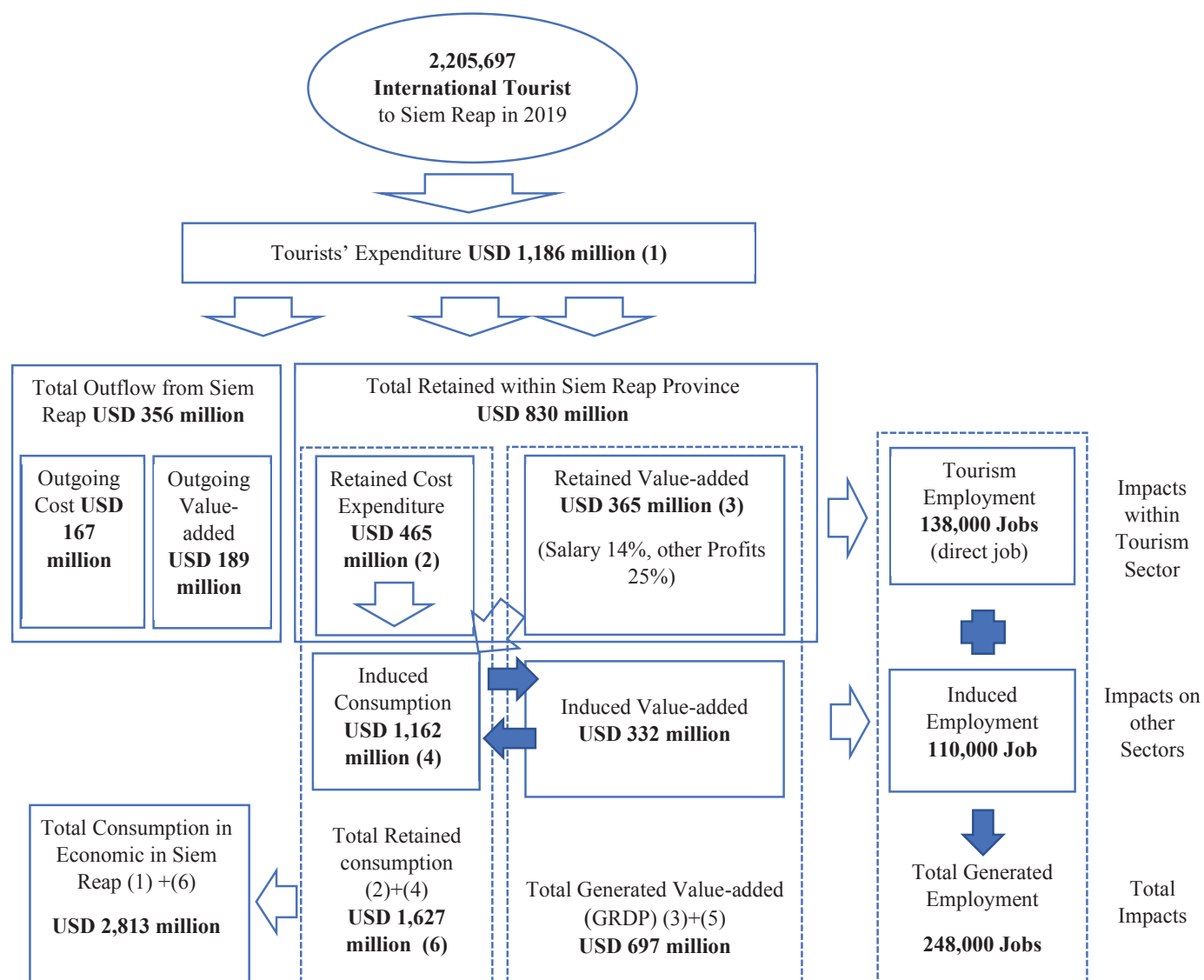


Figure 4: Socio-Economic Impacts Generated by National Tourists' expenditure in Siem Reap 2019

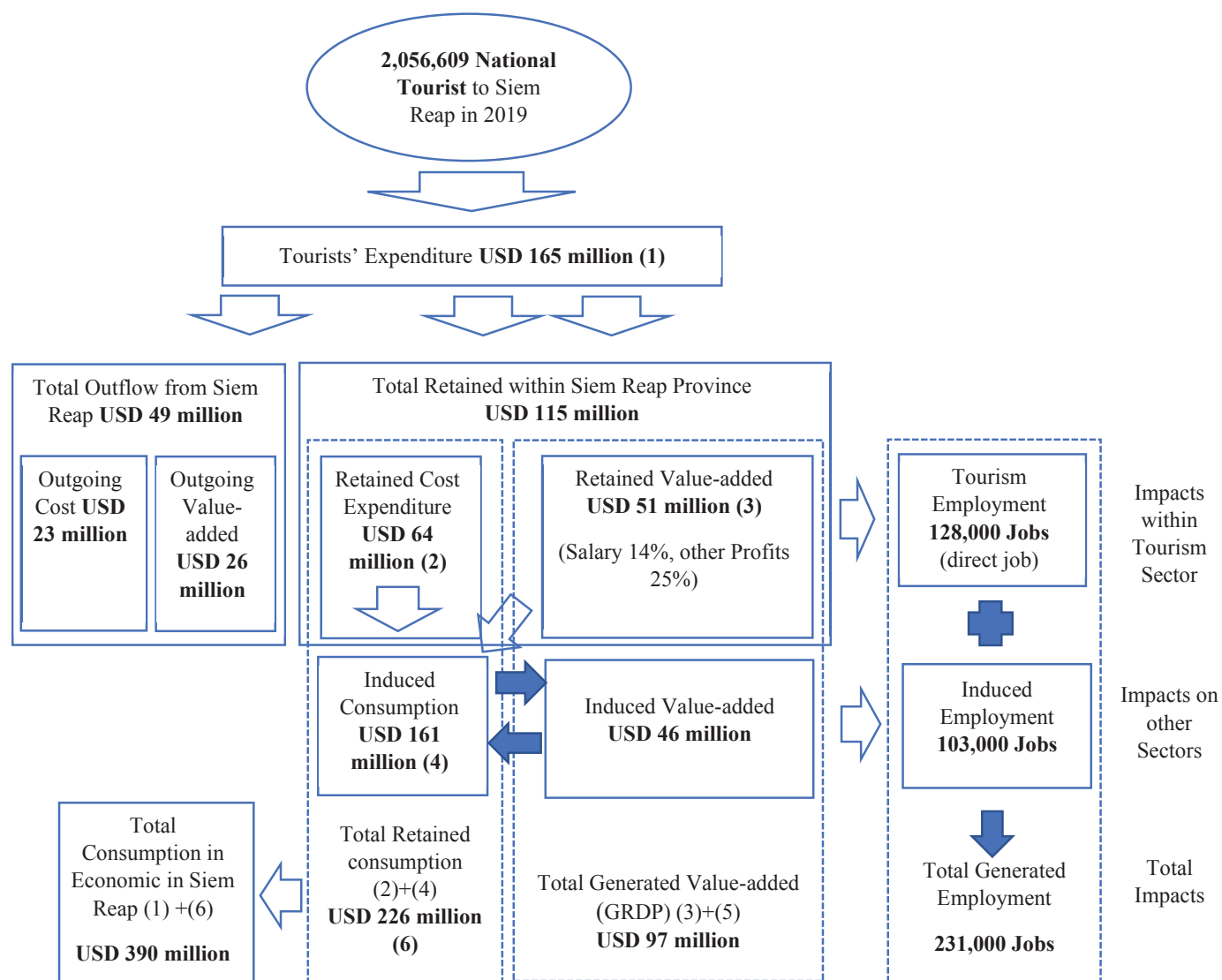


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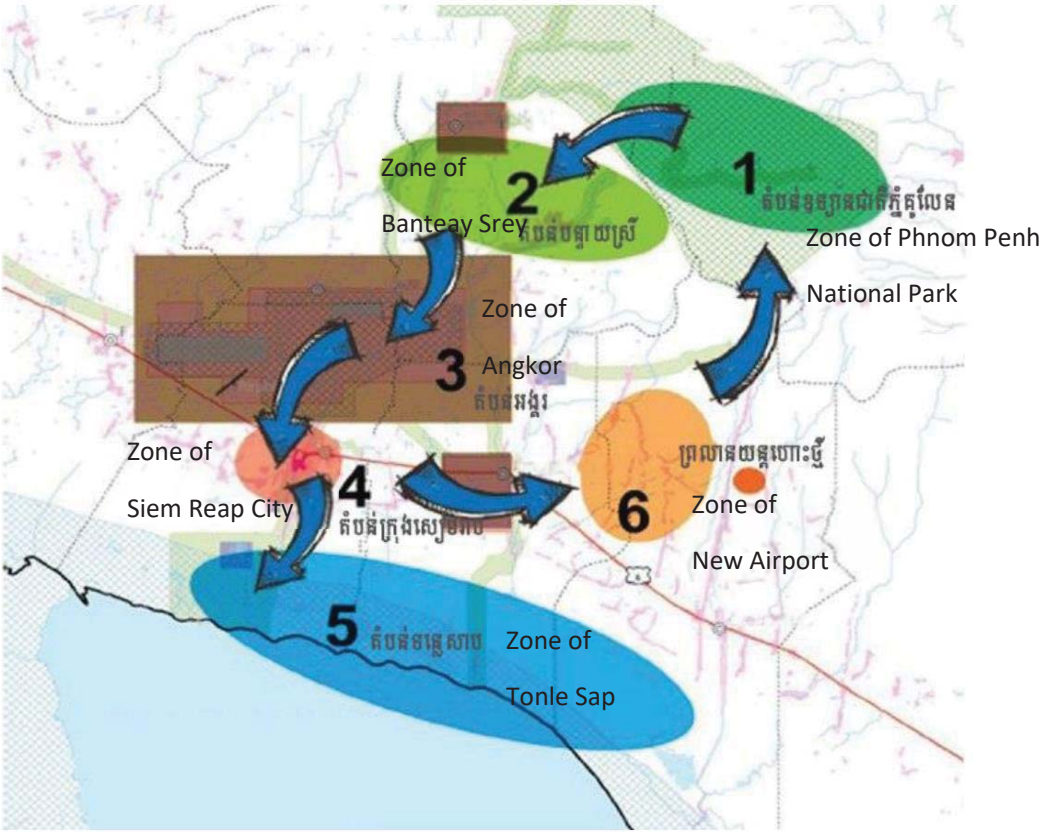


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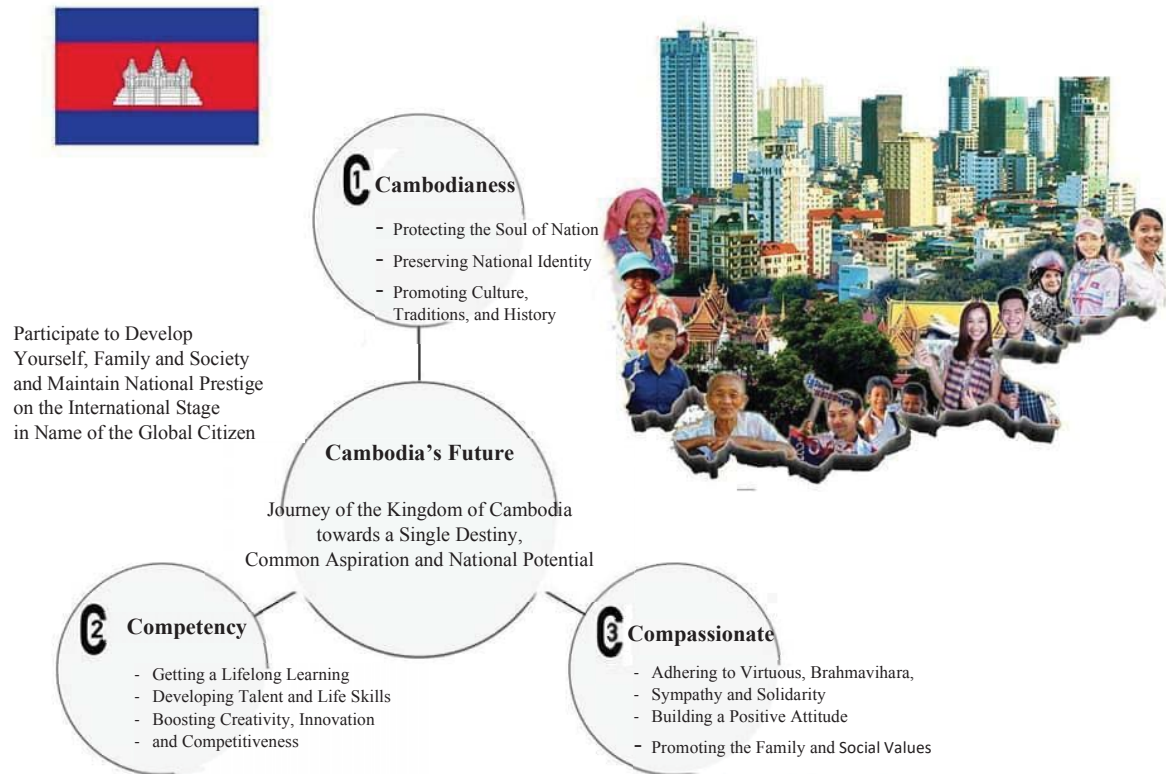
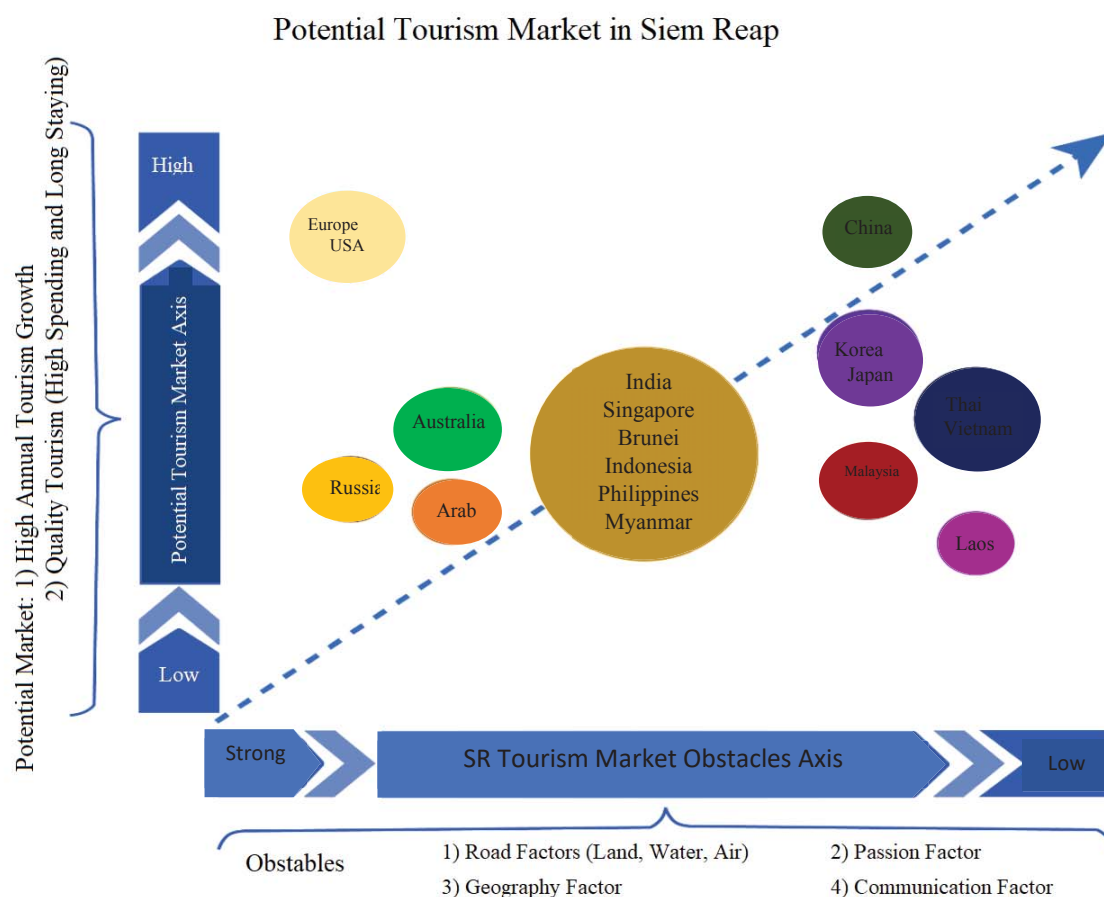


Figure 7: The Main International Tourist Market



The Projection of International Tourist Arrivals to Siem Reap (2035)

Market	Number (2019)	Number (2035)	Growth in Average
China	680,000	2,070,000	15.4%
ASEAN	200,000	1,010,000	5.2%
Korea	140,000	500,000	13.4%
USA	130,000	890,000	17.2%
Japan	10,000	504,000	15.6%
England	59,000	558,000	15.4%
France	52,000	500,000	13%
Germany	40,000	250,000	12.3%
Australia	40,000	203,000	12.9%
Russia	10,000	99,800	6.9%
Total	1,450,000	6,590,000	12.7%

Figure 8: Tourism Promotion Campaign “Cambodia: Kingdom of Wonder – Feels the Warmth



Tourism Branding for Zone of Tonle Sap, Banteay Srey and Phnom Kulen



Figure 9: Institutional Mechanism for Solid Waste Management that was set out in 2021-2035

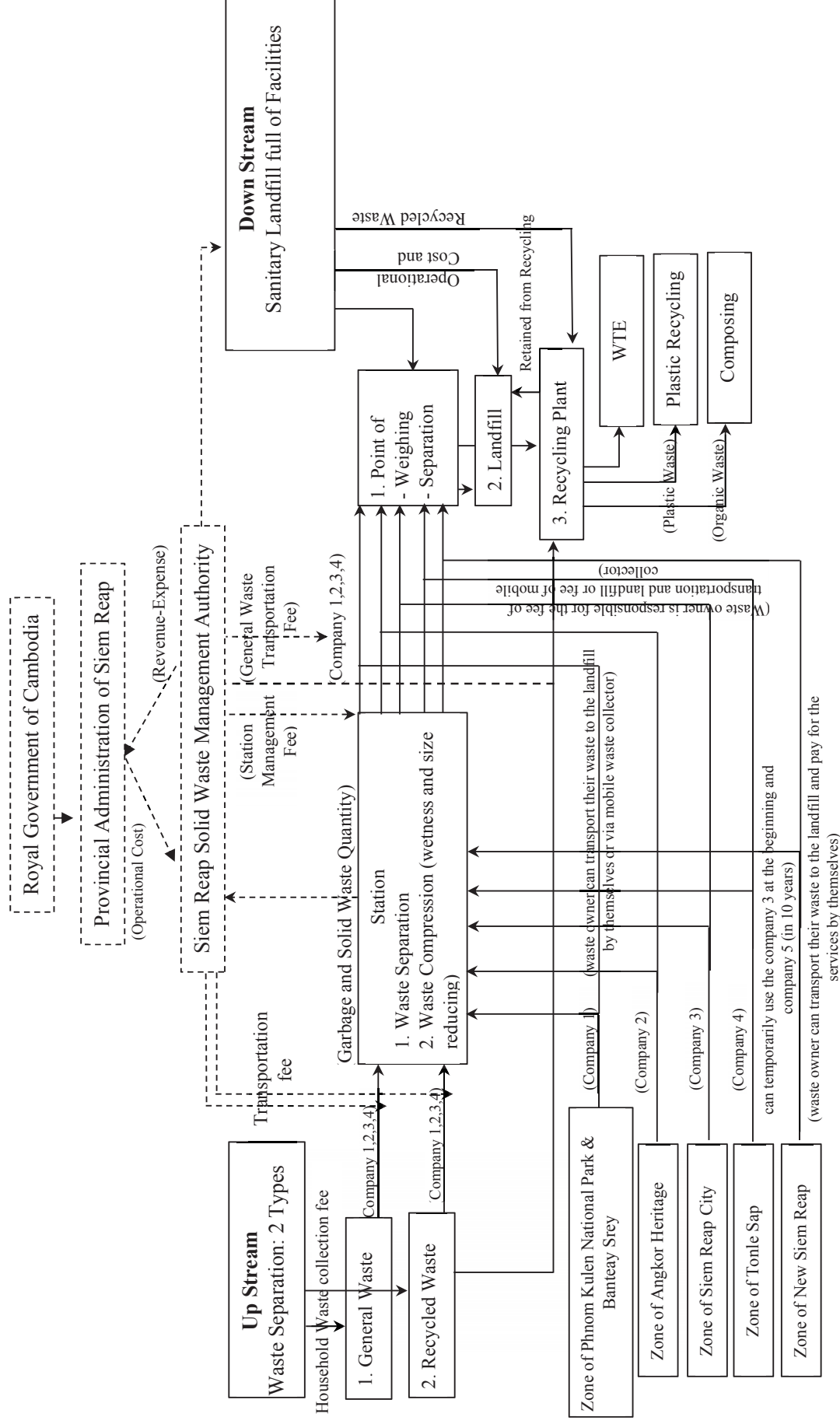


Table 1: Scenario 1 and Scenario 2¹⁹

Tourists	Base Year	(Scenario 1)		(Scenario 2)		Daily Tourist in average by month
		Growth rate	Average length of stay	Growth rate	Average length of stay	
International Tourists	2019	-78% (2020) ¹	2.8 day	-78% (2020) ¹	2.8 days	Monthly Tourist rate in 2019 - Peak: (February: 12.39%) - Low: (September, 5.02%)
		45% (2021-2022) ²		45% (2021-2022) ²	2.8 days	
		30% (2023-2025) ²		30% (2023-2025) ²	2.8 days	
		8% (2026-2030) ³		18% (2026-2030) ³	4.5 days	
		5% (2031-2035) ⁴		8% (2031-2035) ⁴	5.5 days	
Domestic Tourists	2019	-55% (2020) ⁵	1.5 day	-55% (2020) ⁵	2 days	Monthly Tourist rate in 2019 - Peak: (April: 31.74%) - Low: (July, 2.77%)
		30% (2021-2023) ⁶		30% (2021-2023) ⁶	2.5 days	
		12% (2024-2030) ⁷		15% (2024-2030) ⁷	2.5 days	
		8% (2031-2035) ⁸		15% (2031-2035) ⁸	3 days	

¹⁹ For International Tourists

1. Strong decreased rate in 2020 on average -78% caused by Covid-19 pandemic according to UNWTO projection scenarios in the report in June 2020.
2. In 2021-2025: the growth rate could be between 30%-45%, a recovery phase for international tourists, which will take 5 years to stimulate the tourism sector in Siem Reap following the severe crisis in 2020. It should be noticed that: in short-term (2021-2025) the impact of Siem Reap tourism development, although in the scenario 1 (which is a short-term mass tourism) compared to the scenario 2 (which is a quality tourist destination), is not different due to the Covid- 19.
3. In 2026-2030: the growth rate on average is approximately 8% for the scenario 1, which is usually after that dramatic increase, theoretically indicating that the growth will fall in medium- and long-term. Unlike the scenario 2, the average growth of about 18% in the medium-term) is more and higher than scenario 1 through the launch and implementation of Tourism Development Master Plan Siem Reap 2020-2035.
4. In 2031-2035: for the scenario 1, the growth rate remains an average of 5%; While the scenario 2, the growth rate in average is 8% if Siem Reap successfully implements the master plan and has plenty of new tourism products for attracting more domestic and international tourists, increasing their repeat visit, extending their length of stay, and increasing their expenditure.

For Domestic Tourists:

5. Strong decreased rate in 2020 in average -55% caused by Covid-19 pandemic but domestic tourists make more trips and are more motivated by the government than international tourists.
6. The growth rate in 2021-2023, domestic tourists will rebound around 30% for the two scenarios.
7. In 2024-2030: an average growth rate is from 12% (scenario 1) to 15% (scenario 2) through launching and implementing the TDMPSR 2020-2035.
8. In 2031-2035: the growth rate is from 8% (scenario 1) to 15% (scenario 2) if Siem Reap successfully implements the TDMP and has plenty of new tourism products for the domestic tourists.

Table 2: The Forecast of Tourist Number (2021-2035, Trend Projection for “Scenario 1” and Projection with Policy Intervention for “Scenario 2”)

Year	Int. Tourist (pax) (a)	Growth Rate (b)	Average Length of Stay (day/pax) (c)	Total Length of Stay (*day) (d)= (a)*(c)	Nat. Tourist (e)	Growth Rate (f)	Average Length of Stay (day/pax) (g)	Total Length of Stay (pax*day/year) (h)= (e)*(g)	G.Total (Int.Tourist+ Nat.Tourist) (i)= (a)+(e)	Growth Rate (f)	Average Length of Stay (day) (k)	Total Length of Stay (pax*day/year) (i) (i)
2019	2,205,697	-14.86%	2.8	6,175,952	2,056,609	-36.71%	1.5	3,084,914	4,262,306	-27.02%	2.2	9,163,958
Scenario 1												
2023	1,326,319	30%	2.8	3,713,692	2,033,266	30%	1.5	3,049,900	3,359,585	30%	2.2	7,223,108
2028	2,823,617	8%	2.8	7,906,129	3,583,310	12%	1.5	5,374,965	6,406,928	10.20%	2.2	13,774,895
2030	3,293,467	8%	2.8	9,221,709	4,494,904	12%	1.5	6,742,357	7,788,372	10.27%	2.2	16,744,999
2035	4,203,392	5%	2.8	11,769,497	6,604,489	8%	1.5	9,906,734	10,807,881	6.81%	2.2	23,236,944
Scenario 2												
2023	1,326,319	30%	2.8	3,713,692	2,033,266	30%	2.5	5,083,166	3,359,585	30%	2.7	8,902,901
2028	3,682,821	18%	4.5	16,572,695	4,089,625	15%	2.5	10,224,063	7,772,446	16.40%	3.5	27,203,562
2030	5,127,960	18%	4.5	23,075,820	5,408,529	15%	2.5	13,521,323	10,536,489	16.44%	3.5	36,877,713
2035	7,534,656	8%	5.5	41,440,606	10,878,484	15%	3	32,635,453	18,413,140	12.03%	4.3	78,255,845

Table 3: Socio-Economic Effects of Tourists' Expenditure in Siem Reap in 2019

	(million dollar) Consumption	(million dollar) GRDP	(000pax) Job	Share in Province	
				GRDP	Job
Siem Reap Province		1,572*	830**	100%	100%
Total Effects in Siem Reap (a+b+c+d)	3,203	794	479	50.5%	57.8%
● International Tourist Consumption in SR (a)	1,186	-	-	-	-
● Domestic Tourist Consumption in SR (b)	165	-	-	-	-
Tourism Sector	720	631	-	40.1%	-
● Direct effects in SR province (c)	529	416	266	26.5%	32.1%
● Induced effect in SR province (d)	1,324	378	213	24.1%	25.7%

* **(GRDP)**: Gross Provincial Domestic Product (annual income per capita 1,560\$ x 1.007 million of population in 2019)

** 82.4% Employment rate in Siem Reap (according to NEA 2014) (1,007,000 * 82.4%) = 829,768

(Source: Projection of Inter-Ministerial Team)

Table 4: Socio-Economic Effects of Tourists' Expenditure in Siem Reap 2035

2019	Economic Effects of 4.3 million Tourists		
	Consumption (million dollar)	GRDP (million dollar)	Job (0000pax)
Total Effects in Siem Reap (a+b+c+d)	3,203	794	48
● International Tourist Consumption in SR (a)	1,186	-	-
● Domestic Tourist Consumption in SR (b)	165	-	-
Tourism Sector	720	631	-
● Direct effects in SR province (c)	529	416	27
● Induced effect in SR province (d)	1,324	378	21
2035 Scenario 1	Economic Effects of 10.8 million Tourists		
Total Effects in Siem Reap (a+b+c+d)	7,251	1,797	97
● International Tourist Consumption in SR (a)	2,396	-	-

● Domestic Tourist Consumption in SR (b)	961	-	-
Tourism Sector	1,629	1,428	-
● Direct effects in SR province (c)	1,198	942	54
● Induced effect in SR province (d)	2,996	856	43
2035 Scenario 2	Economic Effects of 10.8 million Tourists		
Total Effects in Siem Reap (a+b+c+d)	23,865	5,916	169
International Tourist Consumption in SR (a)	8,103	-	-
Domestic Tourist Consumption in SR (b)	1,958	-	-
Tourism Sector	5,362	4,698	-
Direct effects in SR province (c)	3,944	3,099	94
Induced effect in SR province (d)	9,860	2,817	75

Table 5: The Projection of Demand and Supply of Number of Room of Hotel and Guesthouse in Siem Reap 2020-2035

(Unit: Room)

Year	Room Number based on Tourist Growth ²⁰ (Demand Study)		Room Number to be Supplied (Supply Study)	
	Hotel	Guesthouse	Hotel	Guesthouse
2019	13,192	2,773	14,580 ¹	4,293 ¹
2023	<u>10,141</u>	<u>2,779</u>	<u>11,888³</u>	<u>4,451³</u>
2030	<u>33,948</u>	<u>7,967</u>	<u>39,820⁴</u>	<u>9,664⁴</u>
2035	<u>58,517</u>	<u>14,677</u>	<u>58,844⁵</u>	<u>14,740⁵</u>
Note: <ol style="list-style-type: none"> 1. The existing room number in 2019, 228 hotels (=14,580 rooms) and 248 guesthouses (=4,293 rooms). 2. The decreased rate of room's supply in 2020 in average is -47.75% (hotel) and -40% (guesthouse) due to COVID 19 3. The growth rate in 2021-2023, number of room supply can increase from 15% to 30% (hotel) and around 15% (guesthouse) which is the rebounding period, needs 4-5 years to rebound the SR tourism sector after the serve crisis in 2020. 4. From 2023-2030: an average growth rate of room number from 14% to 15% (hotel) and from 10% to 15% (guesthouse) in which there will be more investment at the important zone in Siem Reap, particularly the priority tourist destinations identified in the master plan. 5. From 2031-2035: the growth rate will be continue increasing around 11% (hotel) and 5% (guesthouse) that after a sharp rise, the growth rate will slow slightly but if Siem Reap shall successfully implement the master plan and there will be new products to attract more national and international tourists, more room supply will always need. 				

²⁰ The calculation of the number of rooms according to tourist's demand is as follows:

- a. Total number of an average of staying per year = (number of tourist) x (average length of stay)
- b. The rate of monthly tourist number (according to the data in 2019) by:
 - International tourist: 12.39% (the highest in February), 5.02% (the lowest in September)
 - National Tourist: 31.74% (the highest in April), 2.77% (the lowest in July)
- c. According to the survey and research of inter-ministerial team, the classification by accommodation service (%):
 - Average of international tourist: 70% (hotel), 15% (guesthouse), 15% (others)
 - Average of national tourist: 27% (hotel), 33% (guesthouse), 40% (others)
- d. Average number of tourist staying in a room:
 - For hotel 1.8 pax/room (int. tourist) and 2.5 pax/room (Nat. tourist)
 - For guesthouse 2.5 pax/room (int. tourist) and 2.8 pax/room (Nat. tourist)
- e. In overall, the total average number of room demanded per day = $(a \times b \times c) / (d \times 31 \text{ day})$

Table 6: The Projection of Room Demand by Hotel Classification 2020-2035

Year	Number of Room Demand	Number of Room Supply	Number of Room Demand by Hotel Classification and Percentage Distribution												
			5	%	4	%	3	%	2	%	1	%	Non	%	Total Percentage
2019	13,192	14,580	4,545	31%	2,375	16%	310	2%	77	1%	75	1%	7,198	49%	100%
2023	10,141	11,888	4,151	35%	2,442	21%	442	4%	292	2%	164	1%	4,399	37%	100%
2030	33,948	39,820	17,085	43%	9,132	23%	3,291	8%	2,998	8%	2,536	6%	4,778	12%	100%
2035	58,517	58,844	27,629	47%	13,851	24%	6,375	11%	5,748	10%	5,241	9%	0	0%	100%

Table 7: Number of Tourist Boat in Siem Reap

No	Community	Number of Boat			Price					Tax	Number of Visitor	
		Small	Big	Total	1-7	8-19	20-29	30-39	40-45		From Apr-July	From Aug-Mar
01	Chung Kneas	127	210	337	15\$	24\$	34\$	44\$	-	3\$	300,600	400,800
02	Kampong Pluk	350	121	471	20\$	33\$	43\$	53\$	63\$	2\$	70,100	100,200
03	Me Chrei	30	8	38	15\$	25\$	35\$	45\$	55\$	2\$	-	60,100
04	Kampong Khlaing	84	12	96	19\$	34\$	41\$	46\$	61\$	2\$	2,540	80,100
Total		591	351	942								

Table 8: The Projection of Solid Waste Reduced by 4R Principle Application (tons/day and tons/year)

The Amount of Solid Waste Reduced in Siem Reap (tons/day and tons/year)		2020	2025	2030	2035
Waste Reduced by Residents	Tons/day	0.00	79.48	270.62	409.52
	Tons/year	0.00	29,010.27	98,775.66	149,473.98
Waste Reduced by Tourists	Tons/day	0.00	2.30	15.04	40.59
	Tons/year	0.00	840.46	5,489.57	14,815.21
Total Waste Reduction	Tons/day	0.00	81.78	285.66	450.11
	Tons/year	0.00	29,850.73	104,265.23	164,289.19

Table 9: The Availability of Financial Resources to Support Solid Waste Management in Siem Reap

Type of Source Waste	Financial Resource
Type 1: Residential waste	<p>Examine the below factors, cost reduction setting in minimal collecting fee by using strict actions is the priority needs:</p> <ul style="list-style-type: none"> • All residents discharge almost equal amount of waste • Some people discharge a lot of waste • Poor and rich people • Residents don't want to pay a collection fee if it's possible. <p>Collection fee system should be:</p> <ul style="list-style-type: none"> • Household tax • Or monthly waste collection fee.
Type 2: Waste from large business entities (big discharge source)	<p>The type of waste is as follows:</p> <ul style="list-style-type: none"> • Small amount of discharging • Amounts of waste discharged are quite different based on its origin • The group is able to pay for the waste collection fee because the expense is a part of their operation costs. <p>Examine the above factors; Siem Reap Solid Waste Management Authority should directly collect the fee relying on the amount of waste discharging.</p>
Type 3: Waste from small business entities (small discharge source)	<p>The fee collection from the source of waste discharging focusing on the actual discharging amount is difficult because there are a lot of small businesses. The waste collection fee system from small businesses should be linked with the residential waste collection fee system.</p>
Type 4: Public waste (roads, rivers, gardens)	<p>There are many alternative sources of financial for the type of waste such as:</p> <ul style="list-style-type: none"> • Tax <ul style="list-style-type: none"> – Adding property tax rate – Increasing special tax on electronic and plastic products – Introducing special tax on Energy and alcohol drinks – Introducing an amenity fee for Siem Reap city – Entrance Fee of visiting Phnom Kulen National Park and Tonle Sap (at communities), etc.

Table 10: The Amount of Water Supply Consumption by Residents and Tourists

Year	2014	2015	2016	2017	2018	2019
Number of resident uses water	26,851	27,467	31,851	35,851	38,266	38,819
Number of tourist uses water	-	-	-	-	-	-
Amount of water used in average per person (liter/day)	157					
Amount of water used in average per tourist (liter/day)	400					

Table 11: The Projection of Water Supply Consumption by Domestic and International Tourists (m³) from 2020-2035

Year	(a) Int. Tourist Number /Year (000 pax)	(b) Length of Stay (day)	(c) Amount of Water Used Ipcd	(d)=(a)*(b)*(c) Amount of Water Used by Int. Tourist (000m ³)	(e) Nat. Tourist Number /Year (000 pax)	(f) Length of Stay (day)	Amount of Water Used by Nat. Tourist (000m ³)	(i)= (d)+(h) Total Amount of Water Used (000m ³)
2019	2,206	2.8	400	2,470	2,057	2	1,645	4,116
2020	485	2.8	400	543	925	2.5	925	1,469
2023	2,180	2.8	400	1,485	2,033	2.5	2,033	3,519
2030	5,128	4.5	350	8,077	5,409	2.5	4,732	12,809
2035	7,535	5.5	300	12,432	10,878	3	9,791	22,223

Table 12: The Power Source of Siem Reap Electricity Generating, Purchasing and Selling (2009-2019)

Year	Power Supplied per Year			Sale Power (GWh)/year	Client's Consumption Growth
	Generate Power (GWh)	Import Power (GWh)	Total		
2009	1.14	164.07	165.21	145.63	18,229
2010	1.33	192.64	193.97	171.84	19,951
2011	1.37	212.79	214.16	188.79	26,156
2012	1.40	267.03	268.43	238.61	28,791
2013	4.40	291.70	296.1	270.04	32,725
2014	5.08	341.38	346.46	319.33	36,726
2015	4.11	398.36	402.47	376.13	40,949
2016	8.08	457.35	465.43	446.61	48,482
2017	2.30	524.37	526.67	510.60	61,745
2018	6.66	588.59	595.25	572.97	76,023
2019	24.19	648.76	672.95	650.53	83,614

Table 13: The Projection of Electrical Power Consumption Demand from 2020 to 2035

Year	Total Number of Domestic and International Tourists	Average Length of Stay of Domestic and International Tourists	Electrical Power Consumed per Tourist/day (kWh)	Total Consumption of Electrical Power by Total Tourists/year (GWh)	Electricity Power Consumed by Total Tourists/day (GWh)
2019	4,262,306	2.4	29.42	301	0.82
2020	1,410,727	2.65	29.42	110	0.3
2023	3,359,585	2.65	29.42	262	0.72
2030	10,536,489	3.5	25	922	2.53
2035	18,413,140	4.25	22	1,722	4.72

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We would like to wish, **Your Excellencies** and **Lork Chom Teav** the four gems of Buddhist blessing: Longevity, Nobility, Health and Strength.

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