

কৌশলগত পর্যটন মহাপরিকল্পনা (খসড়া) _Strategic Tourism Master Plan (Draft)
বিষয়ে মতামত/সুপারিশসমূহ নিম্নরূপঃ

১। কৌশলগত মহাপরিকল্পনাটি সর্বসাধারণের বোধগম্যের জন্য বাংলায় প্রণয়ন/অনুবাদ করা অত্যাৱশ্যক।

২। পৃষ্ঠা-১ এ প্রদত্ত ছবিটি পরিবর্তন করা দরকার। এটা পর্যটন মহাপরিকল্পনাকে Re-present করে না।

৩। Tourism এর ওপর Covid Pandemic এর Effect/Affect গুলো Safeguards and Management Chapter অন্তর্ভুক্ত করা দরকার। একই সাথে National Disaster এর সময় পর্যটকদের জন্য দুর্যোগ ব্যবস্থাপনা কিরূপ থাকবে তা উল্লেখ করা দরকার।

৪। পৃষ্ঠা-২৭ এ Origin Markets for Asia-Pacific - International Visitor Arrivals (2016) এর ছবিতে Bangladesh এর কোন Data নাই। এখানে Bangladesh এর Data দিতে হবে।

৫। Abbreviations গুলো Re-check করতে হবে। উদাহরণ স্বরূপ পৃষ্ঠা-২৯ এর MD-01 এর MD মানে কি Abbreviation হতে খুঁজে পাওয়া যায় নি।

৬। পৃষ্ঠা-৩৬ এর Figure টির কোন Explanation Text এ খুঁজে পাওয়া যায়নি। বিভিন্ন দেশের Flag দেয়া আছে কিন্তু তাদের Interpretation নাই।

৭। পৃষ্ঠা-৪১ এর Map এ High Priority Tourist Sites কি কি Indicator এর ওপর ভিত্তি করে তৈরী করা হয়েছে তা Text বা Map এ উল্লেখ করা প্রয়োজন।


05/09/2022

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বিষয়: কৌশলগত পর্যটন মহাপরিকল্পনা (Strategic Tourism Master Plan) এর বিষয়ে
মতামত প্রদান।

উপর্যুক্ত বিষয়ে জানানো যাচ্ছে যে, বাংলাদেশের পর্যটন শিল্পের উন্নয়ন ও সম্প্রসারণের লক্ষ্যে মাননীয় প্রধানমন্ত্রীর নির্দেশনা অনুযায়ী একটি স্বল্প, মধ্যম ও দীর্ঘ মেয়াদী পর্যটন মহাপরিকল্পনা প্রস্তুতের জন্য গত ১০ ডিসেম্বর ২০১৯ তারিখে IPE GLOBAL LTD নামীয় একটি আন্তর্জাতিক পর্যটন পরামর্শক প্রতিষ্ঠানের সাথে বাংলাদেশ ট্যুরিজম বোর্ডের চুক্তি স্বাক্ষরিত হয়। পর্যটন মহাপরিকল্পনাটি পর্যটন শিল্পের উন্নয়নে আগামী ২৫ বছরের জন্য একটি সুনির্দিষ্ট রোডম্যাপ নির্দেশ করবে। মহাপরিকল্পনাটি ২০৪০ সাল নাগাদ ১০ (দশ) মিলিয়ন বিদেশী পর্যটক আগমনের মাধ্যমে ৮ (আট) বিলিয়ন মার্কিন ডলার আয়ের লক্ষ্য নিয়ে প্রণয়ন করা হবে। এটি বর্তমান সরকারের রূপকল্প ২০৪১ অর্জন এবং ২০৩০ সালের মধ্যে টেকসই উন্নয়ন লক্ষ্যমাত্রা অর্জনে ভূমিকা রাখবে।

২। বাংলাদেশের পর্যটন মহাপরিকল্পনাটি তিনটি পর্যায়ে ১৮ (আঠারো) মাসে ময়োদে প্রণয়ন করার জন্য নির্ধারিত ছিলো। এ পর্যায়ে সরকারি-বেসরকারি বিভিন্ন দপ্তর ও স্টেকহোল্ডারদের সাথে প্রায় ৬০টি অনলাইন এবং সরাসরি কনসালটেশন সভা অনুষ্ঠিত হয়েছে। তাছাড়াও পর্যটনের সাথে সংশ্লিষ্ট ৭৭টি আইন এবং নীতিমালা পর্যালোচনা এবং ১৬ টি দেশের পর্যটন মহাপরিকল্পনা কেস স্টাডি (ভুটান, থাইল্যান্ড, ইন্দোনেশিয়া, মালদ্বীপ, ইত্যাদি) করা হয়েছে। পরামর্শক দল বিভিন্ন গ্রুপে বিভক্ত হয়ে বাংলাদেশের পর্যটন আকর্ষণসমূহ জরিপ করেছে এবং ১০৫১ টি পর্যটন গন্তব্য চিহ্নিত করেছে, যার মধ্যে পর্যটন গন্তব্যের অবকাঠামোগত এবং কর্মক্ষমতা মূল্যায়ন করা হয়েছে। তাছাড়াও আনুমানিক ২৫০+ আবাসন এবং রেস্তোরাঁ, ৬০০ জন অভ্যন্তরীণ পর্যটক, ১০০ জন বিদেশী পর্যটকদের সমীক্ষা এবং অনেক ট্যুর অপারেটরদের সাথে পরামর্শ করা হয়েছে। দেশের সকল জেলায় সরকারি ও বেসরকারি অংশিজনদের সাথে ফোকাস গ্রুপ আলোচনা সম্পন্ন করে বিভাগীয় পর্যায়ে কর্মশালা আয়োজন করা হয়েছে। এছাড়াও, সারাদেশ থেকে প্রায় ১৫০০ জন সরকারি ও বেসরকারি স্টেকহোল্ডারের সাথে পরামর্শ করেছে। দলটি সারা দেশে পর্যটন বিকাশের জন্য ১১টি থিমও চিহ্নিত করেছে।

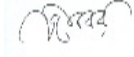
৩। দ্বিতীয় পর্যায়ের একটি কৌশলগত পর্যটন মহাপরিকল্পনা (Strategic master Plan) প্রস্তুত করার জন্য নির্ধারিত ছিল। এই পর্যায়ে নিম্নবর্ণিত বিষয়সমূহ অন্তর্ভুক্ত থাকবে বলে নির্ধারিত ছিলো। ১. বাংলাদেশের পর্যটনের ভিশন, মিশন, কৌশলগত উদ্দেশ্য, অগ্রাধিকার, এবং এ শিল্পের লিংকেজ খাতসমূহ অন্তর্ভুক্ত থাকবে। ২. বাংলাদেশের পর্যটন উন্নয়ন, প্রমোশন এবং রক্ষণাবেক্ষণের জন্য ৩, ৫ এবং ১৫ বছর মেয়াদী কৌশলগত পরিকল্পনা প্রণয়ন করা হবে। ৩. বাংলাদেশের পর্যটন উন্নয়নের সামগ্রিক অবস্থার প্রতিফলন হবে। ৪. নির্ধারিত পর্যটন এলাকার অবকাঠামো ও উপরিকাঠামো উন্নয়ন, পর্যটন পণ্য উন্নয়ন, ডেস্টিনেশন পরিকল্পনা, বিনিয়োগ, মানব সম্পদ উন্নয়ন, প্রমোশন ও বিপণন ইত্যাদি বিষয়ে স্বল্প, মধ্য ও দীর্ঘমেয়াদী সুনির্দিষ্ট দিক নির্দেশনা থাকবে। ইতোমধ্যে পরামর্শক প্রতিষ্ঠান কর্তৃক একটি খসড়া কৌশলগত পর্যটন মহাপরিকল্পনা রিপোর্ট দাখিল করা হয়েছে। উক্ত খসড়া রিপোর্টের উপর এক্সট্রানাল এবং ইন্টারনাল রিভিউ টিম এবং মনিটরিং কমিটি কর্তৃক রিভিউ করা হয়েছে। তাছাড়াও বেসামরিক বিমান পরিবহন ও পর্যটন মন্ত্রণালয় এবং এ সংক্রান্ত অনুষ্ঠিত জাতীয় কর্মশালায় উপস্থাপন করা হয়েছে। সকলের মতামত/সুপারিশসমূহ কৌশলগত পর্যটন মহাপরিকল্পনায় সন্নিবেশিত করে চূড়ান্ত করে পুনরায় বাংলাদেশ ট্যুরিজম বোর্ডে দাখিল করা হয়েছে। দাখিলকৃত কৌশলগত পর্যটন মহাপরিকল্পনা বিষয়ে আপনার দপ্তরের মতামত/সুপারিশ প্রয়োজন।

৪। কৌশলগত পর্যটন মহাপরিকল্পনা (Strategic master Plan) এর সফট কপি এটাচমেন্টে দেয়া হয়েছে। অনুগ্রহপূর্বক কৌশলগত পর্যটন মহাপরিকল্পনা আপনার দপ্তর কর্তৃক রিভিউ করতঃ আগামী ৭ (সাত) কর্মদিবসের মধ্যে ইমেইল যোগে মতামত প্রেরণের জন্য অনুরোধ করা হলো।

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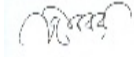
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তারিখ: ১০ ভাদ্র ১৪২৯

২৫ আগস্ট ২০২২

সদয় অবগতি ও কার্যার্থে প্রেরণ করা হল:

- ১) মহাপরিচালক, মহাপরিচালকের দপ্তর, নৌপরিবহন অধিদপ্তর
- ২) প্রধান প্রকৌশলী, প্রধান প্রকৌশলীর দপ্তর, সড়ক ও জনপথ অধিদপ্তর
- ৩) পরিচালক (চলতি দায়িত্ব), নগর উন্নয়ন অধিদপ্তর
- ৪) চেয়ারম্যান, চেয়ারম্যান-এর দপ্তর, চট্টগ্রাম বন্দর কর্তৃপক্ষ
- ৫) চেয়ারম্যান, মোংলা বন্দর কর্তৃপক্ষ
- ৬) অতিরিক্ত সচিব, অতিরিক্ত সচিবের দপ্তর (Blue Economy সেল), জ্বালানি ও খনিজ সম্পদ বিভাগ



২৫-৮-২০২২

আবু তাহের মুহাম্মদ জাব্বার
প্রধান নির্বাহী কর্মকর্তা (অতিরিক্ত দায়িত্ব)

PHASE II FINAL STRATEGIC MASTER PLAN

TOURISM MASTER PLAN OF BANGLADESH



MINISTRY OF CIVIL AVIATION & TOURISM
GOVERNMENT OF THE PEOPLE REPUBLIC OF BANGLADESH



PHASE II

FINAL STRATEGIC MASTER PLAN

TOURISM MASTER PLAN OF BANGLADESH

Contents

1	Introduction	7
2	Scenarios and pathways	10
2.1	Scenario planning	10
2.1.1	No change: Business as usual.....	10
2.1.2	Adaptation: Reacting to reality	10
2.1.3	Ambition: Aggressive growth	11
2.1.4	Transformation: Foresight and leadership	11
2.2	Economic forecasts based on Four scenarios.....	13
2.3	Visualizing the scenarios: Through Indicators.....	14
2.4	Summary.....	16
3	Vision.....	17
3.1	Vision statement for Bangladesh Tourism	17
3.1.1	Mission of Bangladesh tourism.....	18
4	Strategic plan and Recommendations	23
4.1	Tourism Market.....	23
4.1.1	Targeted International and Domestic Market.....	23
4.1.2	Market Development & Promotion.....	28
4.1.3	Investment Promotion and Marketing.....	29
4.2	Product Development	32
4.2.1	Development Principles	32
4.2.2	Targeted themes	33
4.2.3	Geographic Clusters	37
4.3	Tourism Infrastructure	42
4.3.1	Accommodation	42
4.3.2	Transport (air, road, water) and public transport.....	43
4.3.3	Facilities (restaurants, toilets)	45
4.3.4	Communication and Information.....	46
4.4	Capacity.....	47
4.4.1	Institutional arrangements for tourism management in Bangladesh	47
4.4.2	Enabling Environment	50
4.4.3	Legal and regulatory framework for sustainable tourism	56
4.4.4	Human Resource Development (Human capital and education)	56
4.4.5	Data requirements, statistics and KPIs for planning	59
5	Summary of strategic recommendations, prioritization, and Phasing (3,5,15 years)	60
5.1	Market Development.....	60

5.2	Product Development.....	63
5.3	Tourism Infrastructure.....	77
5.4	Institutional and regulatory framework	87
5.5	Business enabling environment for investments.....	91
5.6	Safeguards and management	93
5.7	Enabling Environment for Access and Movements	96
5.8	Human Resource Development.....	98
5.9	Cluster Development Strategies	100
6	Annexure.....	107

ABBREVIATIONS

ATI	Adventure Training Institutes
ATTA	Adventure Travel Trade Association
BELA	Bangladesh Environmental Lawyers Association
BDP	Bangladesh Delta Plan
BHB	Bangladesh Handloom Board
BFD	Bangladesh Forest Department
BFACF	Bangladesh Folk Art and Craft Foundation
BIDA	Bangladesh Investment Development Authority
BPC	Bangladesh Parjatan Corporation
BTRC	Bangladesh Telecommunication Regulatory Commission
BTB	Bangladesh Tourism Board
BTMP	Bangladesh Tourism Master Plan
BSCIC	Bangladesh Small and Cottage Industries Corporation
BSTI	Bangladesh Standards and Testing Institution
CCC	Comilla City Corporation
CDA	Chittagong Development Authority
DoA	Department of Archaeology
DoE	Department of Environment
DoF	Department of Forest
DoS	Directorate of Sports
DIP	Department of Immigration and Passport
DTIDP	District Town Infrastructure Development Project
DU	Dhaka University
EAC	Eastern African Community
FBCCI	The Federation of Bangladesh Chambers of Commerce and Industry
FGDs	Focus Group Discussions
FYP	Five Year Plan
GDP	Gross Domestic Product
GED	General Economic Division

GNI	Gross National Income
GoB	Government of Bangladesh
HBRI	Housing and Building Research Institute
HDI	Human Development Index
IATA	International Air Transport Association
ICT	Information and Communication Technologies
KU	Khulna University
LGED	Local Government Engineering Department
MICE	Meetings, Incentives, Conferences, Exhibitions
MoE	Ministry of Environment, Forest and Climate change
MoCAT	Ministry of Civil Aviation and Tourism
MoCHT	Ministry of Chittagong Hilly Tracts
MoL	Ministry of Land
MoWCA	Ministry of Women and Children Affairs
MRP	Machine Readable Passports
MRV	Machine Readable Visas
NBR	National Board of Revenue
NCTB	National Curriculum and Textbook Board
NASCIB	National Association of Small & Cottage Industries of Bangladesh
NTHCDS	National Tourism Human Capital Development Strategy
NHTTI	National Hotel and Tourism Training Institute
NGO	Non- Government Organisation
NPF	National Portal Framework
NTP	National Tourism Policy
NRCC	National River Conservation Commission
NSDA	National Skills Development Authority
NSDP	National Sustainable Development Plan
NTDC	Nigerian Tourism Development Corporation
OECD	Organisation for Economic Co-operation and Development
PPP	Public Private Partnership
RAJUK	Rajdhani Unnayan Kartipakkha
SoB	Survey of Bangladesh
SDGs	Sustainable Development Goals
SPZ	Strategic Planning Zones
RDB	Rwanda Convention Board
SWOT	Strength, Weakness, Opportunity, Threat
TAT	Tourism Authority of Thailand
TGAB	Tour Guide Association of Bangladesh
TP	Tourist Police
TOAB	Tour operator association of Bangladesh
ToR	Terms of Reference
TTCI	Travel and Tourism Competitiveness Index
UDD	Urban Development Directorate
UGC	University Grant Commission
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization

<i>UTIDP</i>	<i>Upazila Governance Infrastructure Improvement Projects</i>
<i>WEF</i>	<i>World Economic Forum</i>
<i>WTTC</i>	<i>World Travel and Tourism Council</i>

1 Introduction

Due to the sustained development efforts taken up by Government of Bangladesh and her enterprising people, Bangladesh have graduated from the LDC status¹ to a developing country status recently. As remarked by the Government of Bangladesh representative to the UN that “This is a historic milestone to the development journey of Bangladesh”. Moving forward, the development story of Bangladesh must be sustained, and therefore the country will need to substantially develop its services² base, and that is where Tourism sector becomes so very important, as it not only catalyzes growth in services sector but also act as a representative of “Brand Bangladesh” to the rest of the world.

Bangladesh is endowed with natural and cultural heritage, which can easily be promoted in the international tourism markets; combined with the recent economic growth and improving business environment, Bangladesh as a destination has all the ingredients for developing as a major tourism landmark in Asia. Despite the prospects, the tourism sector has received less attention in recent decades than other sectors³, however considering the ambitious target set by Government of Bangladesh for the Tourism sector by year 2042⁴; the sector will need major changes and coordinated effort from all major stakeholders⁵ and initiative from apex leadership, so that budgetary and institutional transformations can be undertaken.

The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts was BDT 627.9 bn in 2014⁶. The major aim of this Strategic Master Plan is to increase this economic contribution significantly by the year 2042, through a synergy between product development, tourism marketing, institutional and implementation processes.

The sector will need sustained investments in Infrastructure and skilled manpower to drive the growth and quality of services. It is anticipated that tourism industry can be among the top 3 foreign exchange earner for Bangladesh and can generate 20% of jobs and contribute 10 percentage to National GDP by 2042⁷. Considering the paradigm shift required in tourism sector, this deliverable tries to build upon the understanding of the comprehensive baseline study undertaken within the project⁸ and outline the areas where major interventions are required for transformative changes by 2042. The report presents following components which have been detailed out in the further chapters:

Visualizations through Scenarios: To see the kind of transformation that policies and interventions can bring to the tourism sector, four scenarios have been presented exhibiting full spectrum of possibilities. The **business-as-usual** scenario can be considered as base scenario which presents the

¹ The United Nations General Assembly (UNGA) last year has approved resolution to allow Bangladesh to graduate to the developing country grouping from least developed country (LDC) category 45 years after it was included in the category.

² Labor-intensive, export-oriented manufacturing driven by the ready-made garments industry has already transformed Bangladesh's economy. But with automation, changing trade patterns etc. the country needs other prominent sectors to also catch up. The ready-made garments and knitwear are the largest source (83.9 per cent) of the total export earnings (BER 2019). All other sectors (such as jute goods, frozen food, agricultural products, etc.) jointly contribute the remaining 16.1 per cent.

³ This is evident from the fact that tourism is still not given a separate ministry and the tourism policy has not been amendment or modified for a very long time.

⁴ Bangladesh Government has set a target of 10 million international tourist till the year 2042.

⁵ Though at national level a co-ordination framework for tourism is existing the Local level co-ordination framework is a real challenge which has been given due focus in this plan.

⁶ Economic Contribution of Tourism Industry in Bangladesh, Sharmin Sultana, Journal of Tourism, Hospitality and Sports, Vol.22, 2016

⁷ Refer transformative scenario in section 2.1.4

⁸ During Phase 1 of the project all major tourism sites in Bangladesh have been studied and presented in Baseline report.

outcome when status quo is maintained in the tourism sector. **Adaptation** Scenario is presented to exhibit outcomes which will take place when incremental changes are taken up in the sector. **Ambition** scenario is presented to see what the outcome will be, if the economy is only geared for growth in the tourism sector and other aspects such as environmental and social safeguards have been given lesser priority. **Transformation** scenario is presented for a more balanced growth with equal opportunities to rural communities, sustainable investments and focus on high value tourism for economic growth. These scenarios are followed by economic impacts and results that are anticipated from each one of them, which allows for the planning of reconditions which have been discussed in further chapters.

Future Goals: This chapter mainly deals with the individual aspects which are the pillars on which a transformative scenario will be delivered. The section identifies five individual goals in terms of Economy, Human development, Products marketing and developing a conducive environment for enabling tourism development. The chapter provides a base for development of Goal posts which are to be achieved under different pillars through recommendations and actions.

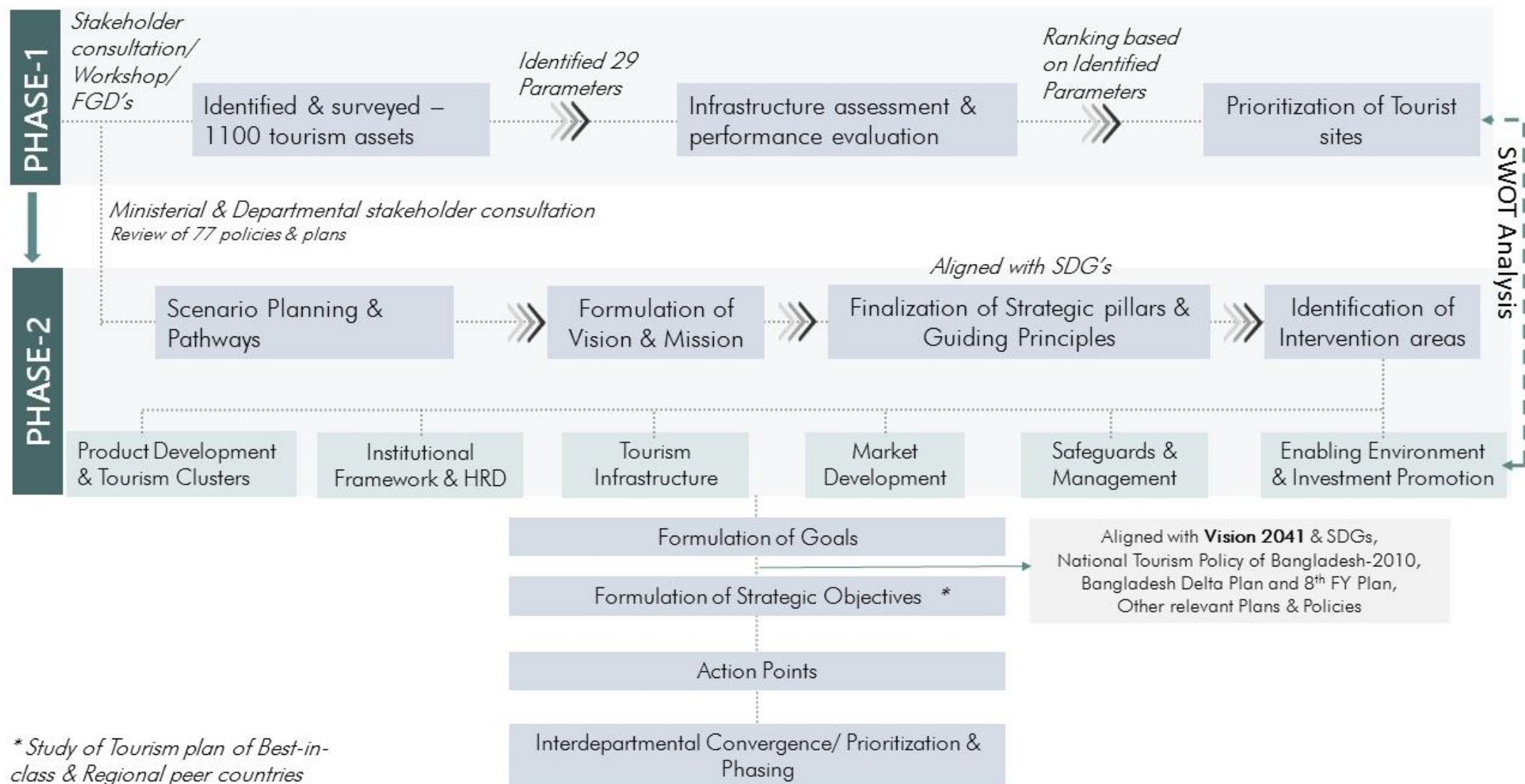
Recommendations on Market Development: Marketing is one of the major areas where reconditioning are required from government of Bangladesh and government spending will be the major aspect which will drive the sector forward. Regarding the same, areas such as International growth segments (non-resident, including diaspora) have been highlighted, recommendations have been provided for running an international advertising and branding campaign to capture target Markets through products such as MICE etc. investment promotion

Recommendations on Product Development: Product development in Bangladesh driven by Self depended Geographic and Thematic tourism Cluster is a key priority. Recommendation are provided for Tourism cluster development in different areas, for various themes, degree of Importance etc. across various Bangladesh. Also, Investments (both foreign and domestic) are key determinants for growth of these clusters hence recommendations and strategies for investment promotion have also been provided.

Recommendations on Capacity and Institutions: The complexity of tourist administrative procedures, along with a weak coordination mechanism and an unclear delineation of power and hierarchy, has a negative influence on the tourism sector in Bangladesh. To address such issues, major institutional reforms have been suggested at all levels.

The strategies proposed are given nomenclature for degree of importance, implementing agencies and priority and the same has been organized in form of action plans to be taken up at successive stages by Government of Bangladesh. The process flow and methodology for strategic master plan is presented as follows:

Figure 1: Process flow Diagram for Strategic master plan



2 Scenarios and pathways

2.1 Scenario planning

As discussed earlier that scenarios are important planning tool, to visualize the kind of transformation that policies and interventions can bring to the tourism sector. In this assessment four scenarios have been envisaged to visualize the full paradigm of possibilities and outcome (which are resulting from inaction to the transformative action). The scenarios are composite sketches of possible trajectories that the tourism sector could take depending on actions and different levels of commitment and coordination from the government and other stakeholders.

2.1.1 No change: Business as usual

Business as usual situation can be taken as a base situation where no major intervention is taken up for the tourism sector and Bangladesh tourism stagnates. With no change in policy, Bangladesh takes longer to recover its pre-pandemic markets⁹. Whilst other countries have taken the opportunity to update their strategy, innovate and pursue new markets, international tourism to Bangladesh only recovers in 2026 through the gradual return of diaspora markets. The recent growth in domestic tourism plateaus, as international destinations reopen and the Bangla middle class begins to again explore further afield, undermining the balance of payments and reducing FX earnings¹⁰. Tracking global growth and benefiting from the expansion of the professional middle class in Asia, international tourism to Bangladesh will then grow by an average of 5% per year, doubling its size by 2040.

However, without product innovation, ageing transport assets and other visitor infrastructure¹¹, no additional investment in market development, a continued lack of policy cohesion across government, maintenance of a strict visa policy, lack of investment promotion and without a business-friendly environment and the growing cost of climate change; tourism will fall behind other sectors in Bangladesh. There will be no change in governance arrangements, statistical reporting, and institutional structures. The private sector will have little incentive to invest, whilst the state subsidises aviation and accommodation assets, and so Bangladesh will fall behind all its competitors, as they leap forward. The value of tourism will grow modestly to \$ 15 bn (at current value with 80% of income from domestic tourism and 20% international), contributing 3.7% of GDP and supporting 10% of employment, mainly in lower skilled, poorly paid, and less secure roles.

2.1.2 Adaptation: Reacting to reality

Adaptation situation can be taken as an intermediate scenario, where Bangladesh tourism grows modestly. Reacting to pent-up worldwide demand for travel, Bangladesh expands its marketing activity, reaching out to emerging markets, especially in Asia, and established pre-pandemic diaspora-led markets internationally. It rides the global recovery of travel and tourism, benefiting from strong demand from the growing professional middle class in Asia and next generation diaspora everywhere, recovering pre-pandemic levels in 2025. Responding to an increased domestic appetite for tourism during the pandemic, the public sector invests in visitor infrastructure and hospitality training and incentivize investors to build conventional tourism resorts.

⁹ Global international tourist arrivals more than doubled (+130%) in January 2022 compared to 2021 and a significant rebound is expected by the end of 2022 as per estimates of the UNWTO. In the post pandemic world, the choices and preferences of international tourist are expected to change significantly, the same has been discussed in Phase 1 report.

¹⁰ It is noted that departures from Bangladesh is 6-8 times as much as tourist arrivals every year (World Tourism Organization, Yearbook of Tourism Statistics).

¹¹ As discussed in Phase 1 report transportation is described as one of the most prominent issue for international tourist visiting Bangladesh.

A new tourism policy and act is approved. But policy cohesion remains absent with poor coordination on visa policy and internal security arrangements, restricting opportunities for product and market development. Whilst domestic tourism continues to grow, there is limited growth in international markets and foreign investment, reinforcing the impression that tourism is neither a key economic driver nor a government priority. Tourism remains a marginal sector, eventually growing to \$21 bn (60% domestic, 40% international) by 2040, representing 5% of GDP, but emphasis on domestic markets limits foreign exchange earnings. Lack of product innovation and adaptation to climate change, continuing state subsidies and high import levies ensure Bangladesh remains uncompetitive for tour operators and other investors, compared to more agile regional competitors, increasing the cost of finance, and reducing the scope for sustainable social and economic benefit.

2.1.3 Ambition: Aggressive growth

Bangladesh tourism grows rapidly and substantially. Domestic tourism grows modestly, whilst international tourism gains a whole order of magnitude. After quickly recovering to pre-pandemic levels by 2024, international tourism to Bangladesh achieves sustained average annual growth of more than 15% until 2040, when arrivals have grown to more than 10m with GDP contribution of more than \$40 Bn. This is achieved through a step change in planning and coordination across government, strict exclusive (and exclusionary) zoning, liberalization of visa policy, massive incentivization of foreign investment and relaxation of environmental and social safeguards. Tourism however is not included in plans for climate adaption and a just transition to a net zero carbon economy. Thus, the country borrows heavily to expand aviation (airports and aircraft) and other high carbon infrastructure to encourage development of luxury hotels, casinos and golf resorts by and for foreign investors and the elite.

National parks and other protected areas are geared towards exclusive resort development and away from heritage conservation and public value. Bangladesh becomes a magnet for short break high-spending visitors from East Asia and the Gulf, with product relying on cheap local labor, foreign ownership, and repatriation of profits. Whilst Bangladesh tourism growth will outstrip most of the region in terms of sheer volume, net benefits will be negligible (especially to the local population) and undermine the economy and ultimately jeopardize the country's recent advances in human development, especially in rural areas.

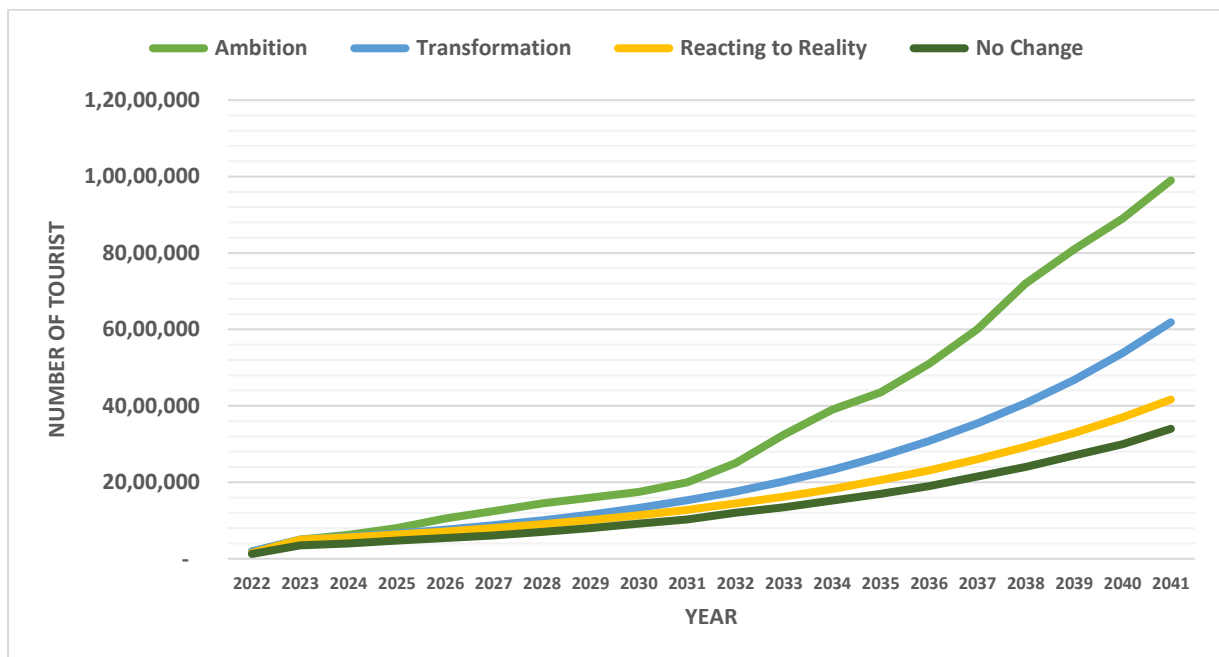
2.1.4 Transformation: Foresight and leadership

Bangladesh tourism evolves to become a driver of sustainable development, becoming the country's top FX earner, generating 8% of GDP, supporting 15% of jobs, enabling import substitution and reducing dependence on migrant labour and remittances. As the world emerges from the COVID-19 pandemic and with Bangladesh's Parliament having on 13 November 2019 declared climate change a 'planetary emergency' and Honorable Prime Minister having two years later established the 'loss and damage' agenda at the UNFCCC's COP26, during which the Glasgow Declaration on Climate Action in Tourism was launched by the UNWTO, Bangladesh embraces the opportunity to implement a national tourism master plan and vision that is transformational in scope and impact. This involves policy cohesion across government and between the public and private sectors and civil society. There is a coordinated framework with new visa policies, an effective business environment with appropriate investment and import arrangements, resilient digital infrastructure, and enforcement of social and environmental regulations. All new infrastructure is 'future-proofed' with provision for transport electrification, sustainable physical infrastructure and high speed broadband.

Corruption (actual and perceived) has been tackled, and statistics are consistently collected and transparently reported to facilitate coordinated planning by all stakeholders. There are new governance arrangements for tourism with institutions that are enhanced and empowered with appropriate capabilities and resources. There is a 'tourism officer' in every district and division. Tourism and hospitality training is expanded, with graduates remaining in Bangladesh, rather than leaving for the Gulf or moving into other sectors. A cabinet level entity, which might involve a

dedicated ministry and a PM-led cabinet committee (probably successor to NTC), is responsible for policy (as custodian and champion of the masterplan), with a number of other bodies and agencies responsible for different areas of policy implementation: marketing, certification, training and product development. The Bangladesh Tourism Board is an agency manned by dedicated tourism cadre, a tourism sector CEO and private sector involvement. The Bangladesh Tourism Board (BTB) will be active in all key markets, whilst the Bangladesh Parjatan Corporation has evolved into a one-stop-shop tourism development agency. There is a network of integrated tourism clusters throughout the country that meet specific market needs and deliver tangible community benefits. The Government is no longer a tourism operator, having divested itself of public aviation and accommodation assets, including government rest houses, all of which are better managed by the private sector.

Figure 2: International Visitors arrivals Per Year According to Forecasted Scenarios



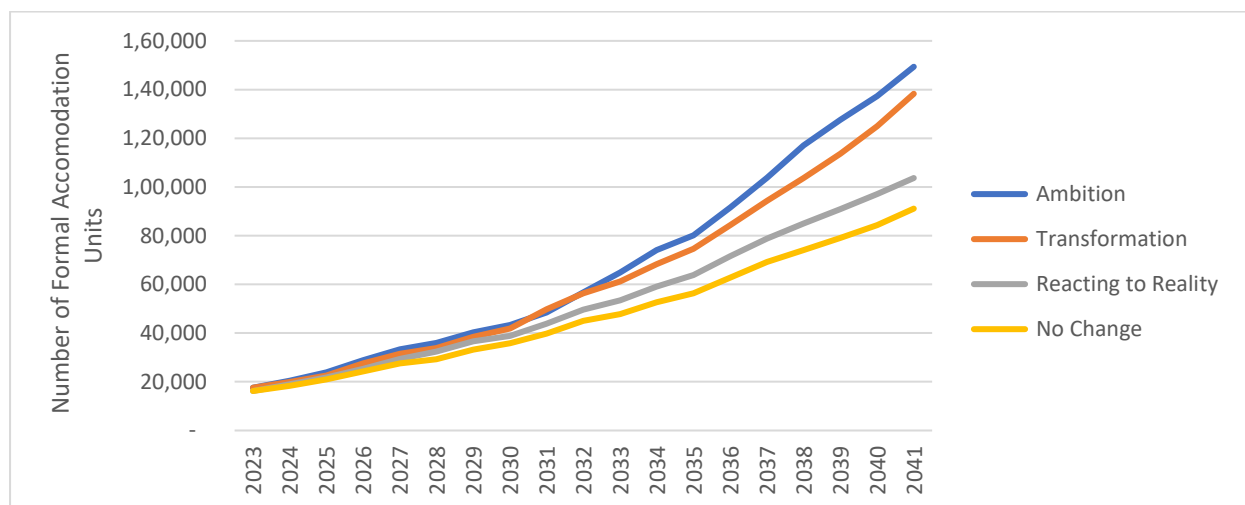
All tourism development is subject to a strict requirement to demonstrate public value through community benefit and how it can contribute to social and environmental development, be climate-friendly and advance the SDGs; public support will not be available to tourism development projects that are not sustainable, and public and private sector assessors will have the capacity to make such assessments. There is a presumption that all tourism products embrace technology that is environmentally sustainable, and the public sector ensures appropriate provision of 'last mile' connectivity for all necessary infrastructure. As well as visa-free travel across the SAARC region, key markets are global. Bangladesh reaps the benefits of establishing one of the most liberal border policies in Asia, and a robust digital environment for visitors, residents, and businesses. Whilst there will be expansion of international airport capacity, domestic aviation will grow steadily, and domestic transport will instead rely on an expanded rail network.

Bangladesh is recognized as world leader in climate-friendly travel and responsible tourism, and a new product segment emerges to showcase Bangladesh's leadership in climate adaptation and climate-friendly tourism. The country has deliberately not achieved its annual target of 10m international visitors, and instead has achieved 6.5m, who on average stay longer and spend more. Employing 20% of the workforce, generating 8% of GDP and comprising travel, transport and hospitality, the visitor economy is worth \$35bn, which probably will become Bangladesh's largest economic sector and FX earner.

2.2 Economic forecasts based on Four scenarios

Economic forecasts indicate a range outcome across the four scenarios. For simplicity very extensive changes in the domestic tourism space have not been envisioned and is quite similar across all scenarios, the major changes envisaged are mostly driven by international tourist markets and diaspora Tourism across all scenarios¹². It is also envisioned that Average Length of Stay (ALOS) will remain slightly higher in the transformative scenario primarily because of the range of tourism products will allow for higher length of stays and more spendings by tourists¹³. As can be observed by the figure below; even though the ambition scenario exhibits stronger growth in terms of number of arrivals, the same level of growth is not necessarily reflected in the accommodation unit requirements as the tourist end up staying for shorter durations than in case of transformative scenario.

Figure 3: Forecasted Formal Accommodation unit requirement for different scenarios.¹⁴



It is important to note that the accommodation requirements will increase 7 times in a transformative scenario and about 4 times even in most pessimistic case; this change in number of accommodations must be catered to by private sector and will mostly be driven by private investments. Hence, it is imperative to allow private capital to be channelized to this sector by easing restriction and investment friendly environment.

Even though the current GDP contribution to the Bangladesh economy is quite low as compared to other sectors, the indirect contribution of travel and tourism sector is almost twice that of its direct contributions to the GDP¹⁵. The economic multiplier effect of tourism in Bangladesh indicates that even though tourism revenues is \$ 337 million the economic benefit and contribution to the GDP was \$ 9 Billion around based on conservative estimates¹⁶. Beyond this, additional value additions

¹² As per transformative scenarios, diaspora and international market alone is expected to drive more than 80% of the tourism revenues for Bangladesh tourism by the year 2042.

¹³ As discussed in section 2.1 transformative scenario the priority will be on high value tourism rather than short duration mass tourism etc.

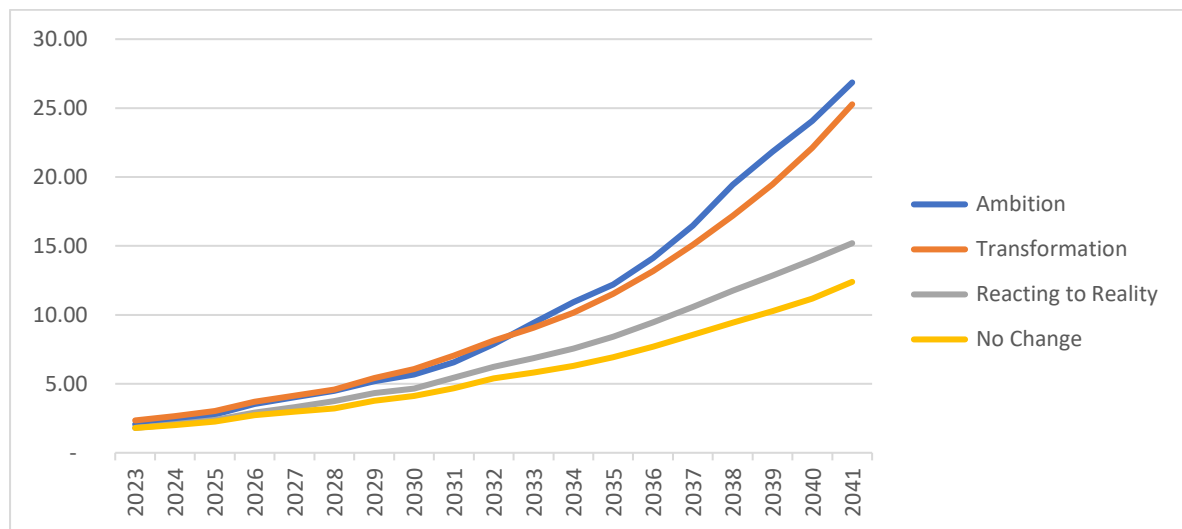
¹⁴ The forecast is dependent on three major variables i.e. number of tourists, accommodation utilization, length of stays.

¹⁵ Socio-Economic And Cultural Impacts of Tourism in Bangladesh. Prof. Dr. Zakaria Lincoln, PhD. European Scientific Journal December 2013 /Special/ Edition Vol.2.

¹⁶ As of 2017 Potential Unexplored? Tourism and Economic Growth of Bangladesh, Basharat Hossain and Syed Naimul Wadood, Journal of Tourismology, 25.02.2020.

through possible government spendings and resultant investments etc. other possibilities that might emerge in future due to tourism, is quite unquantifiable.

Figure 4: Forecasted Formal Sector Tourism Earnings in Billions of Dollars.



Based on the forecast the formal tourism earnings though the transformative scenario could be in more than 25 billion dollars¹⁷ and the actual earnings and contribution to the GDP could be much higher¹³. The actual contribution of Tourism sector could largely be driven by the informal sector contribution as well as several other factors¹⁸.

2.3 Visualizing the scenarios: Through Indicators

The projections of the transformative and ambitions scenarios are evidently better in terms of Tourist inflow, revenue and infrastructure growth however these parameters do not necessarily paint the complete picture. There are several aspects which will be important in order to achieve a significant transformation of the Tourism sector in Bangladesh. The following section and figure present the indicators which will actually deliver help visualize the true scope and challenges associated with the transformative and other scenarios and serve as a visualization tool for the contrast between these scenarios.

The major parameters considered for evaluation are tangible parameters such as growth rate, GDP contribution, jobs generation, etc. as well as intangible parameters such as institutional reform aspects, focus on marketing, skill development, investments and industry outlooks etc. it is evident from the table below that even though initially government funding and intervention is required for Bangladesh Tourism, the actual growth will be delivered through Institutional reforms, product development, development of tourism services industry and a Marketing and branding strategy backed by investments etc.

¹⁷ The formal sector earnings are comprised of allocation of budget towards Accommodation, transportation, recreation shopping etc.

¹⁸ In context of Bangladesh several factor like Domestic supply chain, Capital investment, Government collective spending, imported goods from indirect spending etc. also contribute to the tourism contribution to the economy.

Figure 5: Component based comparison of four scenarios

Components	Business as usual	Reacting to reality	Ambition	Transformation
Growth rate (Annualized)	Approx. 5%	8-12%	Greater than 15%	Approx. 15%
Size	\$ 15 Billion	\$ 21 Billion	> \$ 40 Billion	\$ 35 Billion
Domestic/Foreign Proportion	80% domestic and 20% international	60% domestic, 40% international	20% domestic and 80% international	25% domestic and 75% international
Contribution to GDP	Approx. 3.5 %	Approx. 5 %	Approx. 8-9 %	Approx. 10 %
Contribution to Jobs	10% of employment	10-12 % of employment	15 % of employment	20 % of employment
Job environment and skill development	Low Working condition and skill levels	Working condition and skill levels somewhat improved	Working condition and skill levels somewhat improved	Industry becomes a role model for Working condition and skill levels development
Investments	Incremental investment in tourism sector. and mostly Government led interventions and investments.	- Increased investment in tourism sector. - Some Institutional reforms	- Increased investment in tourism sector. - Institutional reforms for aggressive growth - Unchecked private led investments	- FDI in tourism sector to create iconic destination development experience. - PPP and private led investments. - Regulated and responsive movement of capital
Hospitality industry	Stagnation and lack of standardization.	Improved product combinations and limited growth	Good product combinations with international standards, High revenue leakages.	Very competitive luxury hotels and product combinations with international standards creating values and low leakages.
Aviation Industry	Government driven and priority tourist mode of travel	Government driven and priority tourist mode of travel .	Private driven industry with some more transport option available such as Cruises.	Government driven and multi modal options also available other than flights.
Product development	Status quo maintained and no major product development	Tourism cluster development initiated but not prioritized	Exclusivist Tourism clusters with low benefit transfers	World Class Tourism clusters with high benefit transfer to local communities.
Marketing	Status quo maintained and no major product development	Marketing is not a major priority and some marketing initiatives undertaken.	targeted marketing through a developed strategy for attracting Mass tourism	Efficient and targeted marketing through a developed strategy for attracting high value tourists.
Capacity	Status quo maintained and no major capacity of institutional development	Capacity at all levels of government not present and institutions are weak.	Capacity at all levels of government and private levels however regulations are weak and ineffective.	Very effective and coordinated capacity at all levels of government and private levels

2.4 Summary

The major aim of this Strategic Master Plan is to increase this economic contribution significantly by the year 2042, through a synergy between product development, tourism marketing, institutional and implementation processes. Considering the ambitious target set by Government of Bangladesh for the Tourism sector by year 2042¹⁹; the sector will need major changes and coordinated effort from all major stakeholders²⁰ and initiative from apex leadership, so that budgetary and institutional transformations can be undertaken. To see the kind of transformation that policies and interventions can bring to the tourism sector, four scenarios have been presented exhibiting full spectrum of possibilities. The **business-as-usual** scenario can be considered as base scenario which presents the outcome when status quo is maintained in the tourism sector. **Adaptation** Scenario is presented to exhibit outcomes which will take place when incremental changes are taken up in the sector. **Ambition** scenario is presented to see what the outcome will be, if the economy is only geared for growth in the tourism sector and other aspects such as environmental and social safeguards have been given lesser priority. **Transformation** scenario is presented for a more balanced growth with equal opportunities to rural communities, sustainable investments and focus on high value tourism for economic growth.

The most desirable of all the scenarios is the transformation scenario which combines the aspects of both good governance, Growth, SDGs and benefit spinoffs to the local communities. The recommendations regarding growth, governance and Capacity building have been framed considering this scenario in mind, as this will help to achieve all the six individual goals in terms of Economy, Human development, Products marketing, sustainability and developing a conducive environment for enabling tourism development.

¹⁹ Bangladesh Government has set a target of 10 million international tourist till the year 2042.

²⁰ Though at national level a co-ordination framework for tourism is existing the Local level co-ordination framework is a real challenge which has been given due focus in this plan.

3 Vision

The focus of the strategic master plan is to set out the roadmap for delivering transformation in the tourism sector. The growth envisaged is characterised by close cooperation among stakeholders both nationally and regionally, high awareness and importance laid to environmental and social safeguards and close participation among public and private sector. The vision represents what Bangladesh tourism will become in terms of destination management, government priorities, international relations and the business environment to transform tourism into a driver of sustainable social and economic development. The vision is for operators, investors, policymakers and other key stakeholders. It is not a brand statement or product strategy, which are more relevant to potential visitors and will emerge as part of the marketing and product plans in phase 3. Therefore, after due consultation with relevant stakeholders, the strategic vision for Bangladesh has been conceived as follows, comprising a detailed vision statement, which can be summarised in a concise vision and succinct mission. Together, these will guide all stakeholder activities and policy interventions recommended and indicated by the strategic master plan over the next 20 years. Vision statement for Bangladesh Tourism

3.1 Vision statement for Bangladesh Tourism

Bangladesh a naturally beautiful, culturally sustainable through responsible tourism.

Tourism is a career of choice for young people, and progression is meritocratic. The Government has recognised tourism as a priority sector that can deliver green growth and fulfil many of its statutory obligations towards its domestic population and in advancing the Sustainable Development Goals. Responsive to market trends and changing demographics, the Government is committed to managing its heritage resources to combat climate change, and is ultimately concerned with community benefit, biodiversity conservation and sustainable development.

Six pillars have been identified, to deliver the vision and goals set out for Bangladesh tourism they are mentioned as follows:

- **People's pillar:** Creating valuable workforce and transferring benefits.
- **Economic pillar:** Cementing Tourism as an major national industry delivering substantial growth to the Economy.
- **Service/Experiences pillar:** Unique and world class experiences to travelers.
- **Promotions pillar:** Getting the word out to all priority markets.
- **Sustainability pillar:** Make Bangladesh a world leader in sustainable tourism
- **Enabling environment pillar:** Creating environment for transformation and change.

It is also envisioned that only Increasing tourists' arrivals, (International, Diaspora and National) alone will not supply the looked-for product, investment and market diversification that is necessary to both grow the value of tourism to Bangladesh's economy and to ensure it benefits the country in an equitable manner. The above sets of goals aim to provide a transparent results framework that will drive actions towards achieving the Vision. Specific targets need to be set to ensure close monitoring and evaluation. Progress is to be reviewed initially in 2025 and thereafter every 5 years, and the goals re-evaluated as deemed required.

Based on research and analysis of data the goals and targets have been established. Giving due consideration to targets provided by the authorities by way of terms of reference (TOR), the Key milestones to be achieved through the implementation of the tourism master plan has been done

under 3 different scenarios. (current trend, reacting to reality and transformation) From a macro-perspective, the goals are to increase foreign exchange earnings, raise overall employment and skill levels and propagate Foreign Direct Investment (FDI), whilst ensuring sustainability of all natural and cultural assets through proper, planned conservation, preservation and management

3.1.1 Mission of Bangladesh tourism

Bangladesh to foster an inclusive and sustainable tourism by encouraging private sector entrepreneurs and community participation, promoting the development of digital marketing, enhancing the natural ecology and cultural heritage, highlighting freedom fighting and independence and building tourism related infrastructure with an emphasis on innovation, climate resilience and energy efficiency. All these will be developed with a strong public-private partnership in the tourism industry.

Figure 6: Aspirations for Bangladesh and Tourism Sector

Aspirations for Bangladesh and Tourism sector

- Tourism is the top FX earner in Bangladesh
- Bangladesh consistently ranks amongst the top three recipients of tourism FDI per capita in Asia
- Bangladesh has achieved a HDI of 0.8 [UNDP (2019) = 0.614]
- Bangladesh is no longer a beneficiary of World Bank's International Development Association, as it has become a high-income country (defined by World Bank in 2021 fiscal year as having GNI per capita of USD 12,536 or more) [World Bank (2019) = \$5,190]
- Bangladesh is ranked in the top quartile of the World Bank's *Ease of Doing Business* index (or its successor) [EDB (2019) = 168 (out of 190)]
- Bangladesh is ranked in the top quartile of the World Economic Forum's *Travel & Tourism Competitiveness Index* [TTCI (2019) = 120 (out of 140)]
- Bangladesh is ranked in the top quartile of Transparency International's *Corruption Perceptions Index* [CPI (2019) = 150 (out of 183)]

Figure 7: Pillars of Vision

PILLARS & GOALS

PILLARS	GOALS	SECTORS
 People's pillar	Creating valuable workforce and transferring benefits.	Product Development & Tourism Clusters
 Economic pillar	Cementing Tourism as a major national industry delivering substantial growth to the Economy.	Institutional Framework & HRD
 Service/ Experiences pillar	Unique and world class experiences to travelers.	Tourism Infrastructure
 Promotion pillar	Getting the word out to all priority markets.	Market Development
 Sustainability pillar	Make Bangladesh a world leader in sustainable tourism.	Safeguards & Management
 Enabling Environment pillar	Creating environment for transformation & change.	Enabling Environment & Investment Promotion

1 PEOPLE'S PILLAR

Bangladesh tourism is currently employing around 5 Million persons directly or indirectly with a total contribution of around 8% to the total employment within the economy. However, the sector is not seen as a career of choice within the young people and the Female participation in the sector is low. Most of the Hospitality sector employees have minimal to negligible formal/vocational training. Hence at this level it is difficult to provide higher order services for the Tourism industry.

- **Goal 1:** Tourism and its supporting industries to employ 10 million Bangladeshi's, including increasing the number of women employees.
- **Goal 2:** Increased skill level in the tourism industry with strong educational and industry linkages, making it choice of young people.

<u>Strategic recommendations</u>	<u>Desired Outcomes:</u>
• The strategic plan provides recommendations for improvement of educational standards in tourism and hospitality education institutions (HRD-01). • Improvement of quality of workers already working in tourism industry (HRD-2) and • Development of capacity of institutions at all levels for the carrying out the improvements in Human resources development (HRD-4).	• It is envisioned to increase the tourism employment and economic participation in each division and district as well as improved standards and skills. • Increased number of direct and accredited institutes offering tourism-related courses and with more students graduating • Increased number of tourism related SME registration nationally • Increased number of tourism outreach programs through BTB • Increased number of jobs available in specialist hospitality categories with high Women Participation rates.

2 ECONOMIC PILLAR

Bangladesh tourism is currently earning around \$ 361.0 Million for the economy with 361000 Annual international visitors. A daily traveler stays for around 6.5 days with daily spending of around 75 USD. Currently Bangladesh is connected to international destinations by 21 airlines to major cities around the world however the GDP contribution and FDI in tourism sector is still quite Low as compared to other major sectors.

- **Goal 1:** Tourism to be among the 3 leading foreign exchange earners for Bangladesh by year 2042.
- **Goal 2:** Tourism to be the leading choice for foreign direct investment , in Bangladesh , with significant cumulative increase by 2042

<u>Aligned Strategic recommendations</u>	<u>Desired Outcomes:</u>
• The strategic plan provides several recommendations for increasing FDI into the sector through overhaul of the taxation (R04-R06) and financing mechanisms (R07) for the tourism sector. • For attracting investments and larger players into the sector recommendations for ease of doing business and registrations have been provided (R08-R10). • For increasing length of stays and expenditure product development at cluster level has been given the highest priority with recommendations on developing tourism centers and corridors.	• Increased GDP Contribution is envisioned, with Bangladesh offering value added services in tourism and hospitality sector, which allows for higher tourist spendings and longer lengths of stays. • Increased FDI in tourism creates world class tourism products and services with higher occupancies and international visitations. • Globally Bangladesh becomes one of the most connected destination, offering direct air connectivity to most of Asia and priority markets. • Increased number of public-private partnership projects in tourism • Policy to encourage FDI's with revised incentives for both foreign and local investors.

3 SERVICE (EXPERIENCES) PILLAR

Bangladesh Needs substantial investment in new products and service and data management. At present, data/ statistics collection in relation to tourism, at national and divisional levels remain low. As of 2018, there are handful of specialist companies marketing Bangladesh experiences, including MICE tourism. Infrastructure and capacity for destination development and related activities are not in place and needs to be developed with an overall structures and interdepartmental coordination framework.

- **Goal 1:** To establish ownership of the guiding philosophy and support world-class management of Bangladesh's natural and cultural assets.
- **Goal 2:** Develop and promote world class tourism product recognized at global level which gives Bangladesh tourism an Identity.

<u>Strategic recommendations</u>	<u>Desired Outcomes:</u>
• Strategic recommendations are provided to Improve and expand the range of experiences, facilities, and services (collectively referred to as "products") available in the clusters in order to meet the needs of target markets. • Specific priority has been given to SMEs including tourism services providers for financing, ease of doing business and marketing so that they can develop and market new products. • Priority has been given to strengthen integrated supply chains by facilitating showcases of local suppliers; develop the skills and human resources of the local tourism industry; and Community Enhancement through the Promotion of Community-Based Tourism.	• Shift to creating more extraordinary tourism experiences as well as improved connectivity and accessibility to and within Bangladesh. • Improved experiential tourism infrastructure and management capacity, which includes transport options through clear roles and mandates. • Established portfolio of rooted signature tourism experiences for promotion and marketing. • Increased number of repeat visitors to the country, including Diaspora • Increased visitor dispersal throughout the country • Increased community-led tourism initiatives.

4 PROMOTION PILLAR

Bangladesh needs to get recognition as a tourist destination among the international rankings. It also needs to obtain 3rd party endorsement for products and services, as well as the attractions within Bangladesh to improve on demand from a visitor perspective. MICE tourism has immense potential in Bangladesh and is to be lobbied through established corporates operating within Bangladesh and within the region as the 1st step

- **Goal 1:** Bangladesh as a destination to be positioned on the global tourism map as an emerging tourist destination, through endorsed products and sustained marketing investments
- **Goal 2:** Marketing agencies have increased capacity for promotions especially through different channels such as MICE and other such corporate events and promotions.

<u>Strategic recommendations</u>	<u>Desired Outcomes:</u>
• Marketing and establishing Tourism as Priority Industry if the focus of recommendations. • Capacity building of SMEs has been given priority for developing and marketing their products through mice and other such channels. • Proposals have been provided for expansion of BIDA's activities for investment marketing; and development of capacity of BTB and other such agencies into various marketing channels through sustained investments.	• Improved destination perception and branding among international, diaspora and domestic tourists with a focus on source markets and target segments within the country. • Increased recognition as a newly emerging destination within Asia. • Increased number of strategic international travel and tourism brands within the country. • Increased and sustained investment into market research and innovative destination marketing • Increased number of MICE and events with international interest in Dhaka among corporates • Enhanced levels of consistent quality communications of destination "Beautiful Bangladesh"

5 SUSTAINABILITY PILLAR

Bangladesh tourism needs clear mandate and frameworks for environmental and social safeguards, so that the tourism industry can be more sustainable and contribute to the net zero carbon economy goal of Bangladesh. Clear environmental and social safeguards will increase the resilience of tourism infrastructure and assets and help generate greater value in the long run. Eco-tourism is a low hanging fruit for Bangladesh, a clear eco-tourism policy needs to be developed with interdepartmental endorsement and endorsed.

- **Goal 1:** Bangladesh to be developed as world leader in sustainable tourism; with world renowned eco tourism -products and clear policy and road map for Eco tourism.
- **Goal 2:** Tourism sector is driven by responsible capital with clear policy framework for environmental and social safeguards; and clear inception and operational procedures.

Strategic recommendations

- Various safeguards have been suggested to improve disaster resilience, environmental and operational safeguards (SG 1-10) of the tourism sector with clear articulation of possible risks.
- Due focus is provided for the development of community led tourism and eco-tourism; Ensure the conservation and protection of the cluster's natural resources and biodiversity (CD-08).
- Institutional capacity for co-ordination and development new products (including eco-tourism) have been given priority; along with development of skill levels and sensitization of various service providers such as hotels and tour operations.

Desired Outcomes:

- Introduction of key policies, guidelines and mechanisms for environmental preservation, reduced carbon emissions and eco-friendly practices in tourism
- Development of authentic and world class eco-tourism experiences and signature products which can give identity to Bangladesh tourism.
- Well organized and coordinated action from major departments to develop sustainable and eco-tourism within the country.

6 ENABLING ENVIRONMENT PILLAR

Currently the 2010 Tourism Act and 1972 Act of Bangladesh Prajatan Corporation are in force in Bangladesh which require revisitation with the objective of strengthening legislation and evolving great power/ authority for the development and promotion of tourism with clear defining of roles and the integration process. There is also a need for Clear acts to be established for registration and approval of tourism service providers and the monitoring and controlling process.

- **Goal 1:** To strengthen institutional resilience and governance of Bangladesh tourism to ensure effective tourism asset management at district, divisional and national level.
- **Goal 2:** Increase interdepartmental coordination at all levels through co-ordination frameworks and common mandates.

Strategic recommendations

- The enabling pillar can be divided at three levels i.e. development of various private bodies, service providers and institutions. For this various tax, regulations, financing and skilling recommendations have been provided (refer section R01-08; HRD 01-05) etc.
- The second component is the development of government institutions and realignments for which detailed proposals have been given.
- The third level is the readjustment of legislative and administrative framework and Strategic master plan suggests updating of the Bangladesh Tourism act and other such tools for better governance of the sector.

Desired Outcomes:

- Improved capability and efficiency of Bangladesh Tourism Board and Bangladesh Prajatan Corporation with strong working relations throughout government
- Upgraded institutional policies and processes for better inter- and intra-government working.
- Introduction, amendment and enforcement of tourism-related legislation and guidelines
- Increased number of establishments registered with BTB and continued monitoring
- Enhanced research and data analysis for government and industry decision-making

4 Strategic plan and Recommendations

4.1 Tourism Market

In Bangladesh, the domestic tourist and the diaspora has been the backbone for the tourism industry over the last decade. They will continue to do so especially in this transition period of Bangladesh's tourism, over the next 8 to 10 years. For international tourists, it is essential to have an understanding of the visitor who will want to travel to Bangladesh. The profile of the traveller that Bangladesh is striving for is one who appreciates Bangladesh's authentic and diverse experiences, and feels a sense of responsibility towards the place and its people. Post Covid-19, the competition from countries within the region is an important factor that needs to be considered. Hence, such profiling and segmentation is essentially important for destination marketing when communications may need to be tweaked based on the target audience. Additionally, private sector investment in tourism and hospitality sector, with government support in the form of fiscal incentives, policy relaxations, will position Bangladesh as a highly competitive market.

4.1.1. Targeted International and Domestic Market

Target market segment	Source Countries	Rationale	Motivation for travel/Bangladesh product opportunities
International Markets			
Diaspora – Bangladeshis living outside interested in reconnecting with their roots	UK, Italy (Europe); USA, Canada (North America); Australia; Middle East, India (specifically from the State of West Bengal)	- Estimated at 7.4 million Bangladeshis living abroad, it is the fifth-largest group of migrants globally²¹ - Despite Covid-19 induced decline in remittance flows globally, Bangladesh received \$21.75 billion in 2020 as remittances²². - High remittance flows and annual diaspora visits reconfirms the connection that's exists today.	Largely concentrated in Sylhet and Dhaka; Visiting friends and relatives; Attending various events and festivals such as Eid-ul Fitr, Eid-ul Azha, Durga Puja, etc.; partakes in weekend getaways to Cox's Bazar & Kuakata; interested in culturally rich and historic products such as Mahasthangarh, Lalmai Mainamati; visiting spiritual/religious places like Shrine of Hazrat Shah Jalal; Mausoleum of the father of the nation, sites associated with War of Independence like National Martyr's Monument near Dhaka

²¹ United Nations International Migration 2020 Highlights

²² World Bank (2020). COVID-19 crisis through a migration lens. Migration and Development Brief 32

Target market segment	Source Countries	Rationale	Motivation for travel/Bangladesh product opportunities
Silver haired tourists (Aged around 55+, they are generally post-retirement travellers who are less affected by market downturns and have more disposable income & leisure time)	UK, Germany (Europe); USA (North America); Australia; China, Japan (Asia)	- Increasing share of world's population of 60+ age group, forecasted to reach 21% by 2050. - Constitute fastest growing population segment of wealthier countries. - Growing tourist segment interested in exploring new destinations. - Affluent market to target (research shows 50% of those over fifty are prepared to spend more than £3,000 on a holiday)	'Experience-driven' travel products such as community-based tourism in Thuisha Para in Bandarban and Malancha village in Rangpur; Guided tours along heritage monuments such as Ahsan Manzil, Puthia Rajbari, Muktagacha Palace, Tajhat Palace, etc.; well-connected, well serviced products such as river cruises, etc.
Wildlife or nature enthusiasts (Enthusiasts for nature, the outdoors, both modern and historic cultural experiences.)	UK, Germany (Europe); USA (North America); China, Japan (Asia)	- Increasing market share forecasted through CAGR of 14.3% from 2021 to 2027, (market size in 2019 - \$181.1 billion, in 2027 - \$333.8 billion) as per Allied Market Research. - Varied & unique landscapes (the world's largest mangrove forests, several rivers passing the country, the world's longest beach) offer huge potential	River tourism, coastal tourism, nature/wildlife experiences, ethnic community-based wildlife/nature tourism experiences can provide a point of differentiation; CHT, Tea gardens
Business tourists	India, China, Japan, South Korea (Asia)	- MICE industry is growing rapidly in Asia Pacific region. Bangladesh is 2nd largest apparel exporter²³ in the world after China, creating a demand for more Conventions and B2B Trade Exhibitions - Strategically located, whereby businesses from South Asia see great potential - Potential for growth with appropriate infrastructure development and proper marketing mechanisms	At the moment, most of the major conferences and exhibitions are being held in Dhaka. With its fascinating architecture, archaeological sites and public green spaces, MICE visitors can engage in activities such as sightseeing, dining and shopping.

²³ Export Promotion Bureau (EPB) data, 2021

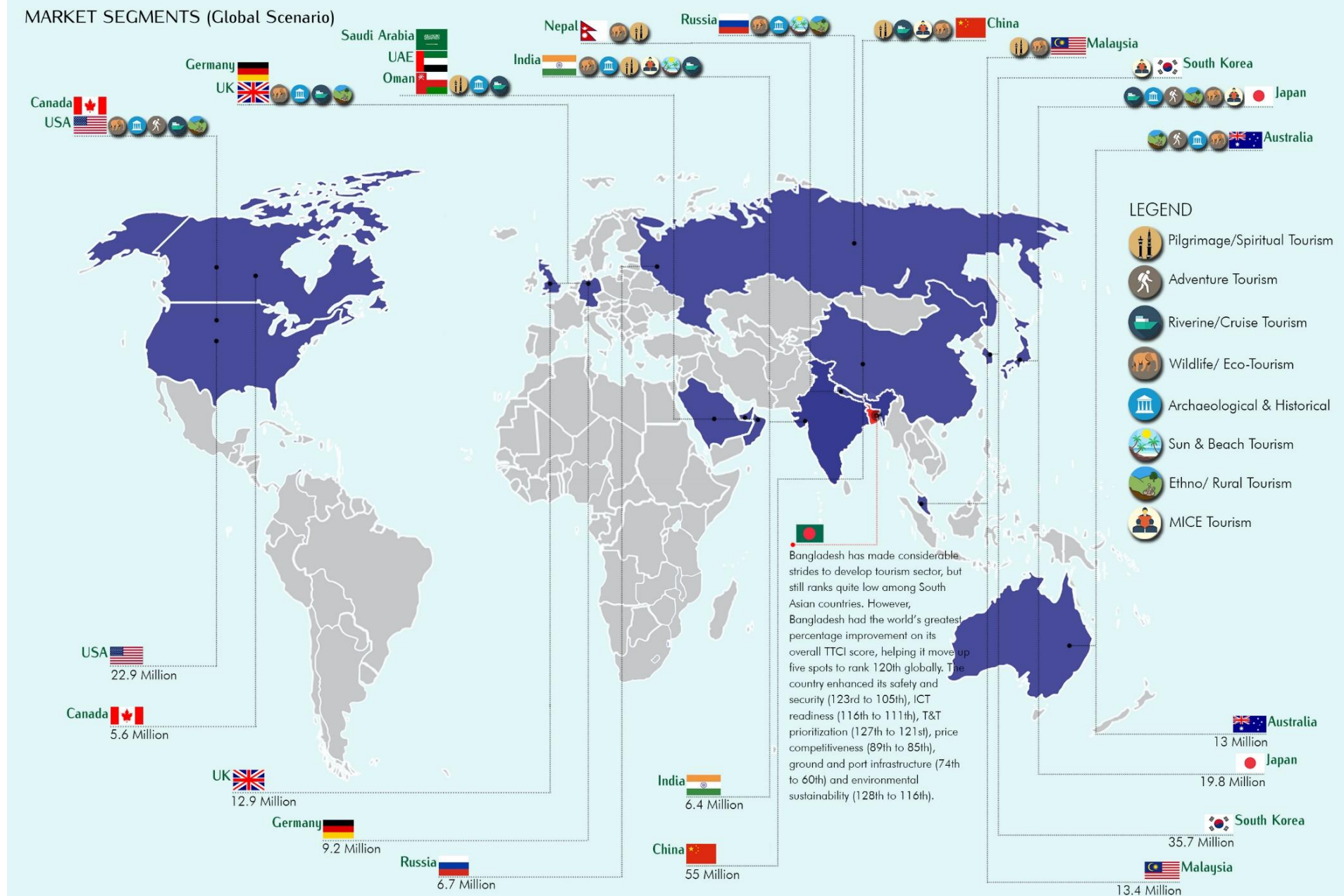
Target market segment	Source Countries	Rationale	Motivation for travel/Bangladesh product opportunities
Students/researchers interested in climate change mitigation studies/ nature and wildlife preservation/ cultural lifestyle	UK, USA, Australia, India	• Forefront of Climate change mitigation research • Massive opportunity to involve volunteer foreign students/scientists in climate adaptation projects, which can become a USP for Bangladesh. • Scope for hosting research communities interested in Asian cultural heritage.	Coastal districts of Bangladesh is prone to flooding, especially the riverine division of Barishal; Eco-sensitive regions of Bangladesh like the mangrove forests of Sundarbans; culturally significant monuments in and around Bangladesh especially in Dhaka and Rajshahi Division.
Muslim Religious Tourists	Saudi Arabia, Qatar, Oman, UAE (Middle East) and Malaysia, Indonesia (South-East Asia)	• 3rd largest Muslim majority nation (with about 90% of the total population being of Islamic faith)²⁴ • Bishwa Ijtema, one of the largest congregations of Muslim communities after Arbaeen Pilgrimage and Hajj, with thousands of Muslims attending this religious event every year²⁵.	Bishwa Ijtema is conducted on the bank of the Turag river at Tongi on the outskirts of Dhaka since 1967. Besides that, significant number of mosques are located here, most prominent among them being the Sixty Domed Mosque, Baitul Mukarram National Mosque, shrine of Hazrat Shah Jalal, Star Mosque, Chhoto Sona Masjid and Seven Domed Mosque.
Buddhist Religious Tourists	China, Japan, Malaysia, Thailand, Nepal (East, South-East and South Asia)	• Bangladesh has the largest Buddhist Vihara 'Paharpur Mahavihara' which has been declared as UNESCO world heritage site, Buddha statue at Ramu and Kuakata etc. • 97% of the world's Buddhists are concentrated in East and Southeast Asia²⁶	Paharpur Mahavihara, Mahasthangarh, Bandarban Golden Temple, and Mainamati Buddhist ruins in Comilla are some of the Buddhist attractions in Bangladesh.
Domestic Markets			

²⁴ <https://worldpopulationreview.com/country-rankings/muslim-majority-countries>

²⁵ <https://www.telegraph.co.uk/news/worldnews/asia/bangladesh/12088120/What-is-the-festival-of-Bishwa-Ijtema-and-where-is-it-held.html>

²⁶ https://www.orfonline.org/research/religious-tourism-as-soft-power-strengthening-indias-outreach-to-southeast-asia-55674/#_edn23

Target market segment	Source Countries	Rationale	Motivation for travel/Bangladesh product opportunities
Middle class families interested in weekend getaways	N/A	• Main market is the growing middle class in Bangladesh, which experienced a rise in average expendable income over the years. • Generally, wants to spend time with friends and family for 2-3 days over the weekend. • While planning their itinerary (choosing a destination, accommodation, transportation etc.), they are looking for value for money and are more likely to choose budget options	Some of the popular weekend getaways include destinations like Coz Bazar, Gazipur, Sundarbans, Sreemangal; also, strong interest in visiting places associated with the country's history and heritage like Bangabandhu Mausoleum, Mujibnagar Memorial Complex, etc.
Millennial adventure lovers	N/A	• Aged 18 to 34, they are more likely to make purchases in support of a cause (e.g. environment or social). • Inclusive of content creators, they are keen on experiences, travel and adventure. • Unlike previous generations, they are willing to spend on travel because they consider it an important aspect of life.	Trekking and hiking routes in Chittagong Hill Tracts (CHT) region; River rafting/kayaking along the various rivers of Bangladesh in Barishal and Sylhet.
Religious devotees	N/A	• Even being a Muslim majority country, Bangladesh has people of different faiths such as Buddhism, Hinduism and Christianity such as Kuakata Misri Para Temple, Dhakeshwari Temple, Armenian Church etc. • With domestic tourists travelling all over the country for religious purposes, potential for making it a significant market for tourism revenue	Innumerable mosques and shrines like shrine of Hazrat Shah Jalal, Star Mosque, Chhoto Sona Masjid, etc; Kantajew Temple, Dhakeshwari National Temple, Puthia Temple, Adinath Temple are some of the most important holy places of worship for Hindu devotees; Bandarban Golden Temple and Ramu Buddha Bihar are important destinations for Buddhist Bangladeshis



4.1.2 Market Development & Promotion

The successful transformation of Bangladesh's tourism sector depends on an in-depth understanding of the global travel and tourism market. Based on detailed trend analysis, market segments have been identified which are the promising for Bangladesh tourism. The government should have a greater responsibility for creating the market linkages, in collaboration with the private sector in marketing efforts, particularly as visitors seek 'experiences' over locations and demand are dynamic in nature.

Issues and Potential

Bangladesh is ranked 120th among 140 countries in the latest Travel and Tourism Competitiveness Index by World Economic Forum. Compared to other regional countries such as India (34th), Sri Lanka (77th) and Nepal (102nd), Bangladesh's position is low. In terms of market development, this is attributed to:

- Formulation of specific tourism marketing guidelines/strategy document and should be in tune with realities of modern-day tourism marketing.
- There is a need to establish more and more targetted marketing session in source countries using foreign media platforms to promote Bangladesh.
- Regular training sessions on market developmet and promotion. Furthermore, increased participation of different ministries, private stakeholders with improved coordination and integration.

Strategies

1. Boost Bangladesh's appeal within South Asia, via revamped marketing and branding campaigns through leveraging the role of different stakeholders

Rationale: Strategies have been made to enhance capacity of Market Development Department of BTB and utilize social media campaigns more. All stakeholders have a vital role to play - Local communities can champion tourism in each region with the support of private sector partners and facilitated by the government. Investment in social media channels will heighten user experience and stimulate conversations about Bangladesh.

2. Strengthen and establish market research capabilities to create database required demand-centric tourism development.

Rationale: Visitor segmentation data about international and national tourists are missing at national level, let alone district/division level. Hence, further research must be conducted to tailor product offerings, marketing efforts to the right market. The marketing strategy should capture and strive to ensure that each market segment is offered the most appropriate product that meets their specific demand, whilst staying true to the guiding principles.

3. Increase marketing effectiveness by launching campaigns catered to the profile and interest of tourists from key origin countries

Rationale: In Bangladesh, the domestic tourist and the diaspora has been the backbone for the tourism industry over the last decade. They will continue to do so especially in this transition period of Bangladesh's tourism, over the next 8 to 10 years. According to a TripAdvisor research, travellers are seeking new experiences: 'learning something new' and 'trying something new' have been widely cited. As such, it is essential to target visitors who will appreciate Bangladesh's authentic and diverse experiences. Tourism is becoming increasingly competitive and high-impact campaigns need to be developed. To achieve this, focus needs to shift to fewer, bigger, better targeted marketing initiatives to inspire target markets to travel to Bangladesh

4.1.3 Investment Promotion and Marketing

Investments (both foreign and domestic) are key determinants of economic growth and development for a country as well as an engine for job creation. Bangladesh has seen a significant increase in private investment over the last decade, though a majority of it has been concentrated towards the textile and manufacturing industries. A smart combination of government support in the form of fiscal incentives, policy relaxations and positioning as a highly competitive market has enabled the exponential growth of the industries. Though the pace of investment has improved significantly a fair bit is left to be desired with respect to the promotion of investments towards tourism and hospitality sector and the general approach of BIDA towards marketing of new products and initiatives. Furthermore, compared to several regional economies in South Asia, Bangladesh has significantly lower FDI inflows with the rate of FDI inflows only being ~1% of the country's GDP. Foreign investors look at the following factors such as macroeconomic indicators, the level of convenience of doing business in the host country, clarity in existing policies, reliability of government officials and adherence to rules and regulations, expected rate of return on their investments, and possibility of repatriation of profits and funds, and more importantly, security for their investments.

Issues and Potentials

1. Lack of Marketing and Investor Engagement Initiatives by Bangladesh Investment Development Authority

The primary investment promotion arm of the Bangladesh government is Bangladesh Investment Development Authority (BIDA). Though BIDA provides end to end investor assistance for easing challenges faced in setting up and running a business, it lacks a robust marketing strategy to address issues such as presence in target overseas markets, increasing footprint of leading international investment groups in the country and a comprehensive digital marketing plan to target potential investors. This often leads to limited private participation towards projects floated by ministries of various industries. The one stop service provided by BIDA too fails to include services and procedures essential for setting up hospitality units.

2. Status of Tourism as a Sector

Bangladesh actively seeks investments in various sectors such as agribusiness, garment and textiles, electronics, information and communications technology (ICT), healthcare, infrastructure, etc.²⁷ and BIDA has devoted sections on these sectors outlining their potential, avenues for investments, as well as a host of investment incentives for their promotion. However, Tourism, as an identified sector, has been conspicuously absent. Tourism in its entirety is omitted from the BIDA website and is only mentioned in the form of Special Tourism Zones under the BEZA website with limited additional details.

3. Lack of Inter-departmental Synergy for Tourism Centric Projects

Tourism being a multi-faceted industry requires active liaising between multiple government departments in order to devise practical strategies and an inclusive plan of action for its development. It was observed that there were systemic overlaps and limited coordination between various government departments resulting in a dilution of responsibility towards and ownership of the tourism industry in terms of planning and promotion of initiatives.

Strategies

1. Adoption of Pro-active Marketing Strategy by BIDA (MD-01)

Rationale: For increasing the flow of ideas and investments into the national economy, a strong push towards marketing and improved investor interaction process is essential. The same can be achieved by focusing on the following key activities:

²⁷ Other sectors include leather and leather goods, light manufacturing, electronics, light engineering, energy and power, information and communications technology (ICT), plastic, healthcare, medical equipment, pharmaceutical, ship building, and infrastructure

Figure 8: Marketing Strategy



2. Establishing Tourism as Priority Industry for Investments (MD-02)

Rationale:

- **Grant of Industry status to tourism and infrastructure status to hotels, resorts, amusement parks and other hospitality projects** above a certain threshold size to allow improved project financing terms for capital intensive asset development
- To promote Tourism as an industry at par with Manufacturing and IT with respect to representation on national forums
- **Preparation of clearly devised policy(ies) by Ministry of Tourism** with the support of the National Tourism Council for sustainable growth and development of the sector. This would also include formulation of product / segment specific policies to promote targeted tourism themes such as Cruise Tourism, MICE Tourism, Heritage and Culture Tourism and Eco-Tourism

- Well-structured and adequately defined **fiscal and non-fiscal investment incentives** towards development of tourism projects ranging from capital subsidies, tax subsidies, etc. to simplified registration, clearance and approval processes similar to ones provided to other thrust sectors and marketing of the same through BIDA and other promotional channels.
- Immediate inclusion of details regarding identified special economic/tourism zones by BEZA and the specific development and hospitality projects proposed within the same on both BIDA and BEZA websites in order to attract investor attention.
- Improved access to potential land bank for easy project identification and formulation
- Capacity building of skilled workforce for enabling tourism activities
- Development of identified priority projects via Public Private Partnership mode with reasonable risk sharing and attractive terms of engagement
- Setting up Project Development Cell with cross department engagement, which would be responsible for working with the local/state governments for identifying the opportunities for public private partnerships and provide requisite project development and transaction advisory support
- It is essential to have authentic data for key segments of the industry including but not limited to tourist arrivals and source regions, supply capacities, public and private financing for projects, availability of skilled resources etc.

3. Institutional Realignment (MD-03)

Rationale: For focused planning and effective implementation of development strategies it is important to have a strong institutional framework with clearly defined tasks and responsibilities. Limiting overlaps between government bodies and increasing accountability towards assigned procedures allows for increased efficiency. Such clarity has a positive impact on investor confidence especially for remote foreign investors with minimal background and experience in the nation. (For further details kindly refer to section 4.4.1)

4.2 Product Development

4.2.1 Development Principles

Build capacity of supporting institutions:

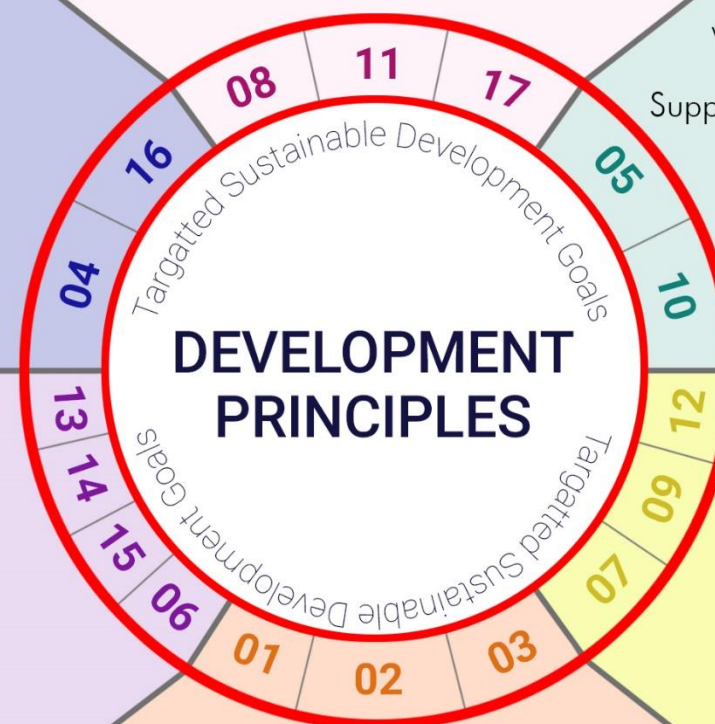
Given the limited financial and human resources and enormous tourism development challenges in Bangladesh, it is crucial that all role-players cooperate within a clear organizational framework and that their roles be clearly defined in order to prevent duplication and waste of resources. Financial institutions and public grant making bodies must develop their understanding of these principles, and funding should be conditional on projects advancing these principles, especially in relation to environmental sustainability and community benefit.

Develop attractive and sustainable tourism products:

The government and private sector must invest in improving tourism products to encourage visitors to stay longer and spend more. Private sector ownership and community-led partnerships have proven to be the best and most sustainable model for improving tourism accommodation, transportation, and other services. Private investment can occur in partnership with Government and/or local communities. A technical & financial capacity building programme will be required to help small and micro enterprises (including women and youth owned) organise, improve service levels and develop management skills. To improve the destination's competitiveness, commercial products (hotels, restaurants, entertainment, tours, etc.) and public attractions must be improved. Natural and cultural heritage sites and other resources should be conserved and protected.

Maximise local participation & benefits:

It is crucial to raise awareness and strengthen the capacity of community members to co-manage tourism in their regions, minimise negative impacts and maximise benefits. Achieving a "tourism culture" in the region will require practical demonstrations of tourism's benefits and opportunities to the local community, and every effort should be made to facilitate and encourage community participation in tourism. To protect the participation of vulnerable groups such as women and young people, a conducive environment should be created. It is necessary to have a realistic and well-planned training and skills development plan. Identify local champions and experts. Train them, support them and facilitate dialogue with representatives of other clusters. Support community-led initiatives and strengthen local supply chains. Local institutions should be strengthened and empowered, and new enterprises should be encouraged and empowered to use local supply chains and provide employment and career progression for local staff.



Adopt a sustainable spatial development approach:

To ensure controlled and sustainable tourism development, it is recommended that a spatial tourism guide plan and policy be created. The guide plan and supporting policy should include three broad recommendations. First, distinct zones for spatial development should be established based on physical, social, & environmental conditions. Second, guidelines for each zone's development to ensure maximum economic, social, and environmental sustainability; these can include land ownership arrangements, development densities, height and coverage restrictions, local ownership ratios, guidelines for building design, and environmental management conditions. Thirdly, a clear land-ownership and land tenure system, as well as a concession policy and system, should be developed and communicated for tourism development, including maintenance of public access to public assets, such as beaches, riverbanks and common pasture.

Promote energy efficient & climate resilient/adaptive infrastructure:

The government must promote and support sustainable infrastructure like bike lanes and pedestrian walkways. Consider sustainability clauses in building permits or green building design and operational standards. It is also recommended to revise regulation & zoning laws to promote sustainability. National quality rating systems should be implemented to ensure universal quality in transportation infrastructure and services. This will motivate operators and providers to improve quality. Light transportation options are also recommended, especially in tourist hotspots lacking public transportation. A tourist-oriented sightseeing electric bus/electric boat within or around the cities, similar to the European Cities hop-on hop-off bus, should be established. Finally, improving the walkability of streets will benefit both tourists and locals. The government should improve street vendor regulations, add more pedestrian zones, public bins, & walking maps.

Whilst some would say that Bangladesh's tourism reputation is broadly positive, there is certainly room for improvement. Without doubt, competitor destinations in South and Southeast Asia will vie for a larger share of the tourism pie. It will be essential to position and promote Bangladesh's genuine and largely untouched natural and cultural experiences as exceptional and distinctive in comparison to those of other nations. This involves supporting the tourism industry in Bangladesh to develop in a balanced and positive manner through the use of effective and targeted marketing and the establishment and dissemination of national certification schemes and associated quality marks. The targeted marketing campaigns can also be used to encourage international tourists to stay longer and spend more money and at the same time attract more domestic tourists. Digital technology will be integrated to improve the efficacy of marketing initiatives and increase the impression made on prospective tourists.

Provide a one-stop tourist package:

4.2.2 Targeted themes

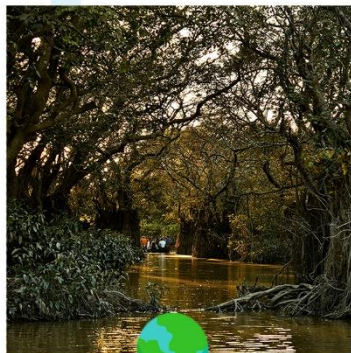
Since the mid-1990s, Bangladesh's tourism industry has grown. It has huge potential to develop tourism by implementing new policies and strategies. It is rich in heritage, culture, ancient and beautiful mosques and temples, magnificent tea gardens, and scenic landscapes. Additionally, the country is rich in ancient history which is evident in the numerous famous monuments, archaeological sites, and historical sites scattered across the country such as Pundraardhan, the oldest city in Bangladesh established in third-century BC. Many rivers intersect the coastline and merge with the Bengal Sea, creating a unique coastal morphology. Bangladesh also has a thriving Ethno and Rural Tourism. Historically, the tourist industry has valued a country's material amenities over its inherent charms. The 1030 visited tourism assets across the country were mapped and classified based on activities and themes identified during site visits. Figure 1 depicts the predominant themes preferred by both international and domestic tourists (based on primary surveys). Bangladesh's demand for international and domestic tourism has increased recently. Sadly, local businesses and communities have not seen increased revenue from tourism, and tourism investment has been modest. Due to the country's small scale and scope of tourism products and services, many visitors from Dhaka and other parts of the region only visit Cox's Bazar and Sundarbans for the day or overnight, resulting in low expenditure and economic/employment spin-offs. The government, local communities, and private entrepreneurs will need to invest time and resources to make most of the region's natural and cultural resources. Innovative and strategic measures hence are urgently needed to improve the health of this industry. These suggestions are broad and provide only basic directives for expansion of tourism.

Table 1: Targeted Tourism Themes - Issues and Recommendations

Theme	Issues	Recommendations
Eco Tourism/Wildlife Tourism	• There is a lack of proper waste management and visitor administration in places like the Sunderbans, Jafalong, and Cox's Bazaar, etc. • The Dependent communities in protected areas do not receive a fair share of the revenue generated by the protected areas. • Inadequate marketing strategies, combined with a lack of or limited capacity on the part of local communities, result in a negative outcome. • A lack of tourism-related guidelines or codes of conduct in environmentally sensitive tourist destinations such as St. Martins, Haora and Baora islands, swamp forests, and the CHT region. • The failure to effectively implement existing conservation laws and policies on the ground has resulted in practices such as illegal tree felling, sand mining, and other illegal activities taking place.	• Position Bangladesh as a well-known ecotourism destination by developing high-quality products and implementing environmentally friendly practices. • Conservation and preservation of the area's natural resources and biodiversity while providing high quality and responsive visitor services. • Facilitate increased private sector and community involvement in ecotourism development
Riverine Tourism	• There is a lack of infrastructure at the river ports • Encroachment on rivers, sand mining, and poor water quality as a result of industrial and urban waste disposal. • In rivers, infrequent dredging results in a reduction in the depth of waterbodies, posing navigational difficulties for vessels. • Water inundation problems that occur on a seasonal basis	• Improve infrastructure and visitor experience to develop Riverine Tourism • Leveraging Bangladesh's extensive river network to develop cross-border river-based tourism.

Theme	Issues	Recommendations
Sun and Beach Tourism	- Coastal areas such as St. Martin and the Char Bijoy Islands are experiencing increased environmental stress and degradation as a result of increased tourism, which is leading to the loss of biodiversity, particularly coral reefs and red crabs, in these areas. - Inadequate coastal regulations have resulted in the unplanned development of multi-story hotels and restaurants along beaches. - Inadequate beach infrastructure, such as the absence of changing rooms and restrooms.	- Protect and restore the fragile beaches to improve the quality of beach destinations in Bangladesh - Revitalizing the coastal belt of Bangladesh as a high-quality tourism destination by monitoring and controlling development
Historical/ Archaeological Tourism	- Inadequate integration of laws and practices governing heritage protection and management into development policies - Lack of marketing of historical and heritage sites in order to convey the location's significance to international tourists. - Improper designed visitor management facilities - Limited consultation with host communities regarding heritage resource conservation, management, and interpretation - Inadequate promotion, distribution, and sale of ethnic crafts and handicrafts	- Strengthening the preservation of Bangladesh's heritage assets - Safeguard the cultural heritage ecosystem – both tangible and intangible
Pilgrimage and Spiritual Tourism	Poor civic infrastructure (lack of public toilet facilities, narrow streets littered with trash, clogged drains, etc.) and lack of quality accommodations near religious sites.	- Creating world-class religious tourist destinations with international recognition - Emphasizing Bangladesh as a Buddhist travel destination that provides spiritual experiences
MICE Tourism	- There is a severe lack of infrastructure in Bangladesh, which has hampered the development of MICE tourism. - Poor private sector participation in the development of Bangladesh's MICE sector - Insufficient marketing strategies to position Bangladesh as a reliable and safe destination for hosting more internationally recognized conferences and events.	- Developing a robust and vibrant ecosystem for MICE Business - Improving ease of doing business to position Bangladesh as a leading business tourism destination.
Adventure Tourism	Lack of basic infrastructure facilities, shortage of skilled/professionally trained instructors, and lack of financial support for equipment procurement and maintenance. Absence of operator guidelines governing safety standards and practices, as well as a lack of marketing campaigns promoting adventure destinations	Developing a sustainable adventure tourism market for Bangladesh
Ethno/Rural Tourism	The local community is underrepresented, and infrastructure facilities are inadequate. There are no policies or regulations in place to protect the interests and ethnic autonomy of ethnic peoples and communities.	- Improve product and service quality through tourism attractions and experiences - Develop local tourism skill and human resource - To safeguard tourist destinations through sustainable interventions - Development of Destination control mechanism and encouraging green practices - Developing agro-tourism as an important component of authentic Bangladeshi experience

1 Sundarbans, Khulna



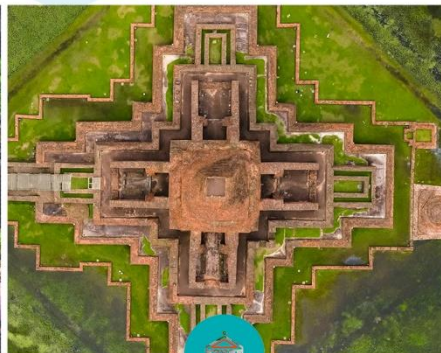
ECO-TOURISM

2 Vegetable Floating Market, Boithakatha



RIVER/CRUISE TOURISM

3 Sompur Mahavihara, Paharpur



ARCHAEOLOGICAL & HERITAGE

4 Bangabandhu International Conference Center



MICE TOURISM

5 St. Martin Island



SUN & BEACH TOURISM

INTERNATIONAL

Predominant Tourism Themes

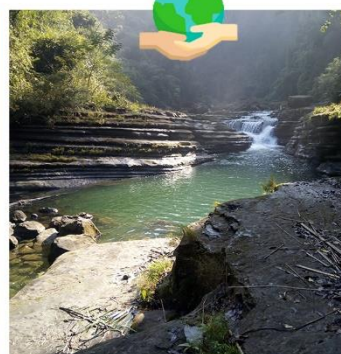
NATIONAL

1 SUN & BEACH TOURISM



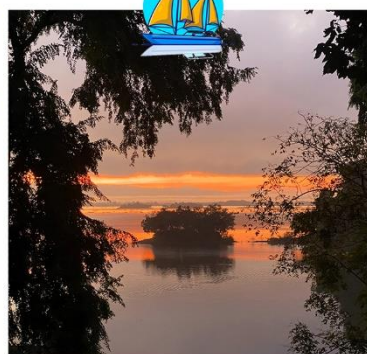
Cox's Bazaar Beach

2 ECO-TOURISM



Bandarban, Chittagong

3 RIVER/CRUISE TOURISM



Padma River

4 PILGRIMAGE TOURISM



Hazrat Shahjalal Mazar Sharif, Sylhet

5 ARCHAEOLOGICAL & HERITAGE



Sixty Dome Mosque, Bagerhat



UK Australia

USA Germany

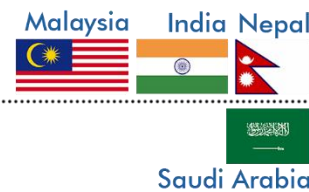
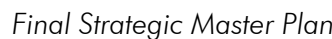
A grid of flags representing various countries. The top row shows the flags of India, the USA, and China. The bottom row shows the flags of the UK, Australia, and Bangladesh. A black dot is positioned to the left of the UK flag.

UK USA China India

Canada Japan Germany

Australia Bangladesh

 ** Bangladesh Flag denotes prominent theme for "Domestic Tourism"



Rationale:
Approximately 30% of global tourism activities take place in coastal areas and regions; one out of every two tourists travelled to the coastal areas; contributes about

- ## LEGEND
-  Pilgrimage/Spiritual Tourism
 -  Adventure Tourism
 -  Riverine/Cruise Tourism
 -  Wildlife/ Eco-Tourism
 -  Archaeological & Historical
 -  Sun & Beach Tourism
 -  Ethno/ Rural Tourism

4.2.3 Geographic Clusters

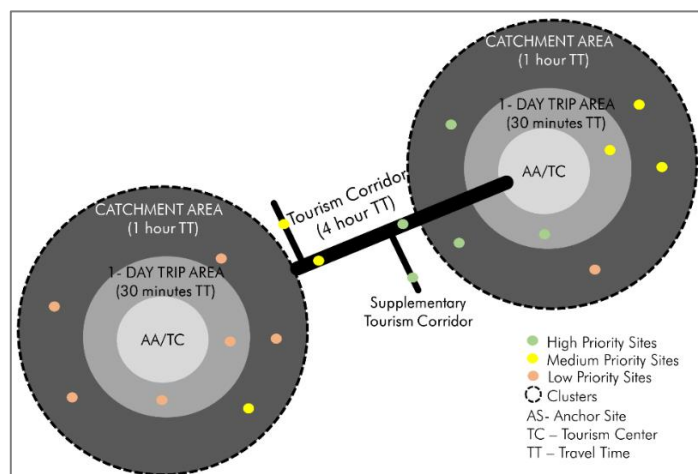
To make Bangladesh's diverse assets more accessible to prospective tourists, the identified and prioritized tourist destinations have been grouped geographically. The section provides an overview of the clusters and their various components, which include tourism centers, anchor sites, and tourism corridors. The purpose of a cluster is to provide a ready-to-promote tourism package that includes a consistent theme, mobility, and the necessary infrastructure.

*"Tourism cluster is a group of highlighted tourism attractions within a limited geographic space provided with high quality equipment and services, social and political cohesion, linkage between productive chain and associative culture, and excellent management in company nets that bring about comparative and competitive strategic advantages."*²⁸

A cluster is defined as a way of grouping a number of assets with relevant visitor infrastructure to meet visitor needs and promote community benefit. A cluster is both a "group of different elements" and a "group of highlighted tourism attractions", its essential component is the "linkage between productive chain and associative culture, and excellent management in company nets that bring about comparative and competitive strategic advantages." A cluster is a tool to drive sustainable socio-economic development through tourism, which depends on effective and efficient destination management, cooperation and leadership by local stakeholders within the cluster's host community.

In Bangladesh, there are essentially two types of clusters that are relevant. One Geographic Cluster and the another Thematic Cluster. To begin, a geographic cluster is a group of assets that are concentrated in a specific geographic area and are relatively close to the focal point or nucleus. Due to locations and access points, some geographic clusters, such as the tourism cluster in Sylhet, are contained within district boundaries while others, such as the tourism cluster in Coz bazar, overlap, due to the availability of several anchor sites and one or more tourism centers. In the context of Bangladesh, a tourism center, one-day trip area, and catchment area are all be part of a geographical cluster as represented in figure 9.

Figure 9: Representation of Geographic Cluster

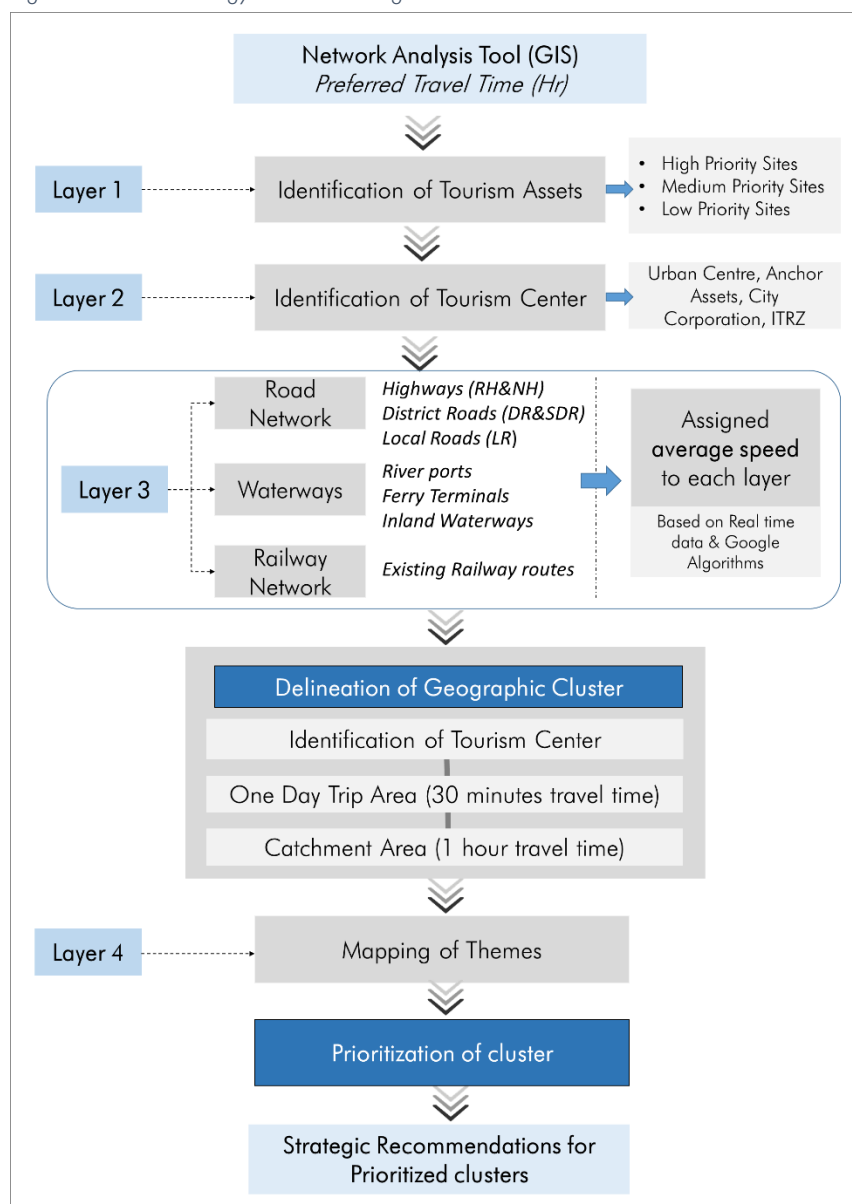


Tourism Center: Each cluster will have its own "Tourism Center," which will address all tourism infrastructure/ visitor infrastructure needs. A "TC" is a "nucleus" or "focal point" with all necessary visitor infrastructure and is well connected by rail, road, river, or air. Tourism centers can include an anchor site (a well-known tourist destination), a city corporation, a town, a tourism city, or an ITRZ. In some cases, the cluster does not have a town/city as a focal point, but rather an anchor site²⁹ that serves as a tourism center, such as in Barishal, where Kauakata replaces Patuakhali as a tourism center. Some clusters already have visitor infrastructure in place, such as a variety of hospitality options and adequate and appropriate lodging, while others will require infrastructure development in the future. The potential for accommodation as a network of community homestays, small hotels, and/or luxury resorts, based on market demand and community benefit will be detailed in subsequent deliverables.

²⁸ Beni, M. C. (2003). *Globalização do turismo: megatendências do setor e a realidade brasileira*. São Paulo: Aleph.

²⁹ According to our primary survey, the tourist destinations that have been identified as high priority and of international and national significance are termed as Anchor sites. The anchor sites has pulling power in its own right, It has relevant accessible facilities (eat, sleep, wash) and has the management infrastructure to facilitate the growth of the larger cluster.

Figure 10: Methodology for Delineating Clusters



One-day Trip Area: The one-day trip area is defined as the area within a 30-minute radius of a Tourism Center where tourists can stay and participate in activities during a single day. According to existing tourism characteristics in Bangladesh, the majority of visitors for the One-Day Trip are Diasporas and expats looking for a quick weekend gateway. Because of time constraint and a dearth of tourism activities and services, they limit themselves to one-day trip area only. As a result, strategies for increasing the length of a tourist's stay from one to at least three days in clusters are proposed.

Tourism Corridor: Tourists visiting Bangladesh are concentrated in a few destinations near airports, river ports, and launch terminals due to poor domestic connectivity. Tourism corridors are created to highlight the best of each region's attractions, including community-based tourism. Inadequate bus services, expensive taxis, and railway network limitations currently limit options for travel between tourism assets. Furthermore, the quality of many regions' highways is still deplorable. To support the distribution of tourism benefits and encourage longer stays in Bangladesh, an initiative to improve the overall intra-country transportation experience is critical and thus, tourism corridors are being created. The Tourism Corridor is a four-hour overland journey that takes tourists from one tourism center to another, assuming there are attractions along the way. Tourists coming from far flung places prefer itinerant travel that includes a variety of tourism assets as well as connecting tourism centers. A tourism corridor will ensure that no high-priority site of international or national significance is overlooked when delineating clusters and circuits.

For delineating a geographic cluster, a GIS based network analysis tool has been used through a four step approach.

Step 1: Identification of Tourism Sites & Tourism Center: Based on the findings of the primary survey and situation analysis, identified 1025 tourism sites across the country are used as layer one in the network analysis tool, so as to promote balanced tourism growth in the areas. As shown in figure 10, all classified and prioritized tourism sites are mapped as high, medium, or low priority. As shown in map1, some anchor sites, major towns, and ITRZs have been designated as Tourism Centers, which cater to visitor infrastructure needs. A total of 30³⁰ tourism centers have been identified across the country and are being considered as layer two in the analysis.

Step 2: As shown in figure 10, In the network analysis, the third layer used is the entire transportation network including Road ways (Regional and National Highways, District and

Sub-District roads and Local roads), Waterways (Ports, Ferry Terminals and Inland waterways routes) and rail networks. In order to achieve a distinct cluster outline, a well-connected road and water transport network is a primary consideration. According to our primary survey, the preferred travel time for tourists is one hour by road/water transport. Assuming road infrastructure improvements, an average speed of 31kmph to 35kmph is estimated across the country using

³⁰ The country has 52 tourism centers. 30 tourism centers have been identified from 52, based on available infrastructure and visitor needs and satisfaction.

Google's road network algorithms, while ferry passengers travel at an average speed of 10kmph. Due to the presence of traffic jams, the major cities such as Dhaka, Sylhet, and Chattogram are considered separately when calculating the average speed. Annexure III contains all pertinent information regarding travel time and speed.

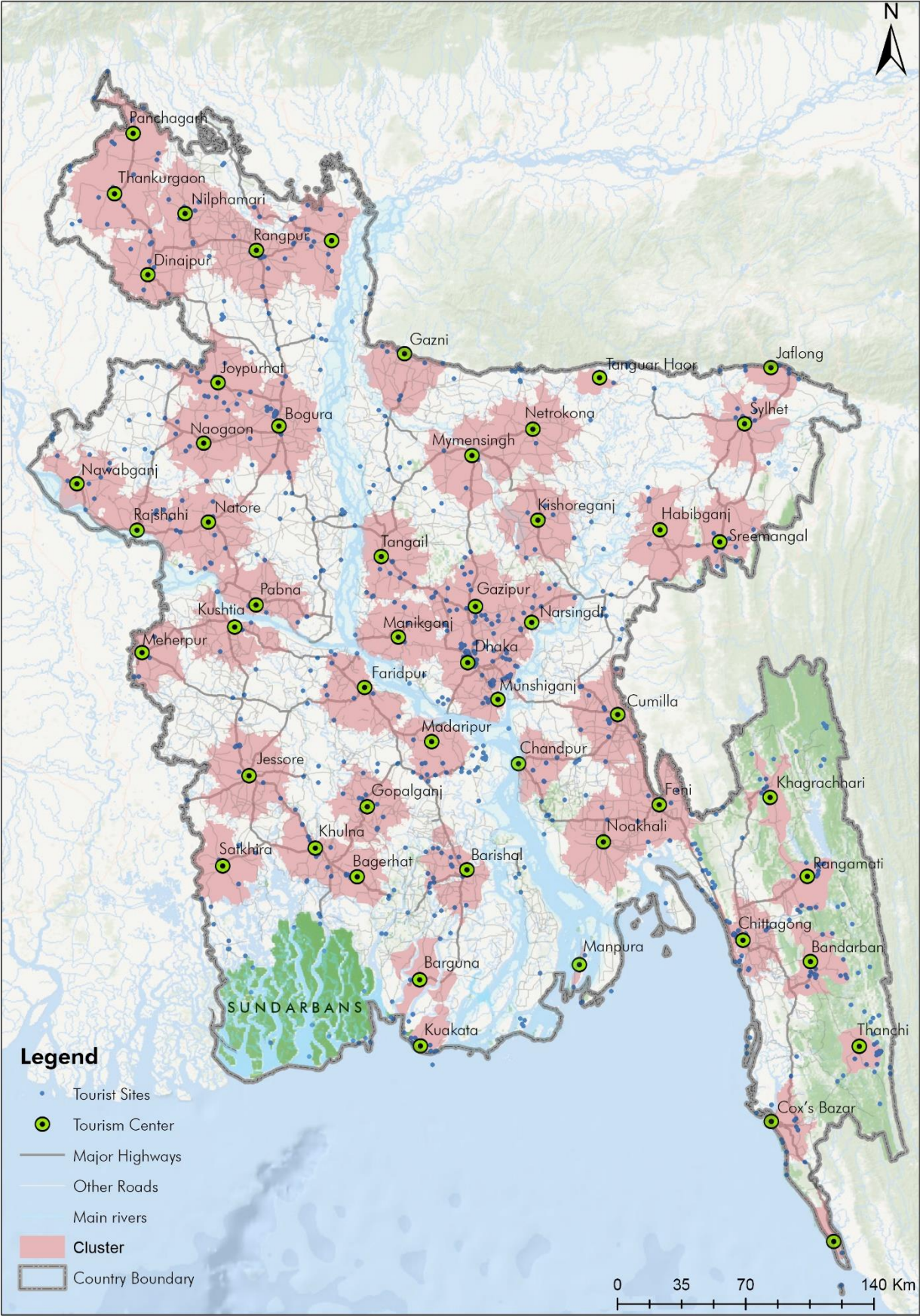
Step 3: Through informal interaction with tourists and local tour operators preferable travel time for tourists is estimated. The preferable travel time of 1 hour for any tourist is decided to establish the extent of tourism cluster and 30 Minutes for the one-day trip area. This is determined to be the most appropriate duration for tourists to absorb the experience from the previous site, take rest, adequately enjoy the scenic beauty during the journey without monotony and build anticipation for the upcoming site.

Step 4: Finally, each site will be classified and mapped according to its tourism category or theme. The clusters' dominant marketable theme is identified through the activity mapping and asset categorization processes detailed in Deliverable 2. Each cluster may contain one or more marketable themes that are based on the cluster's existing characteristics. All identified high-priority sites are prioritized for cluster delineation. If the clusters do not include the high-priority sites, they are connected via tourism corridors or supplementary tourism corridors to form a network.

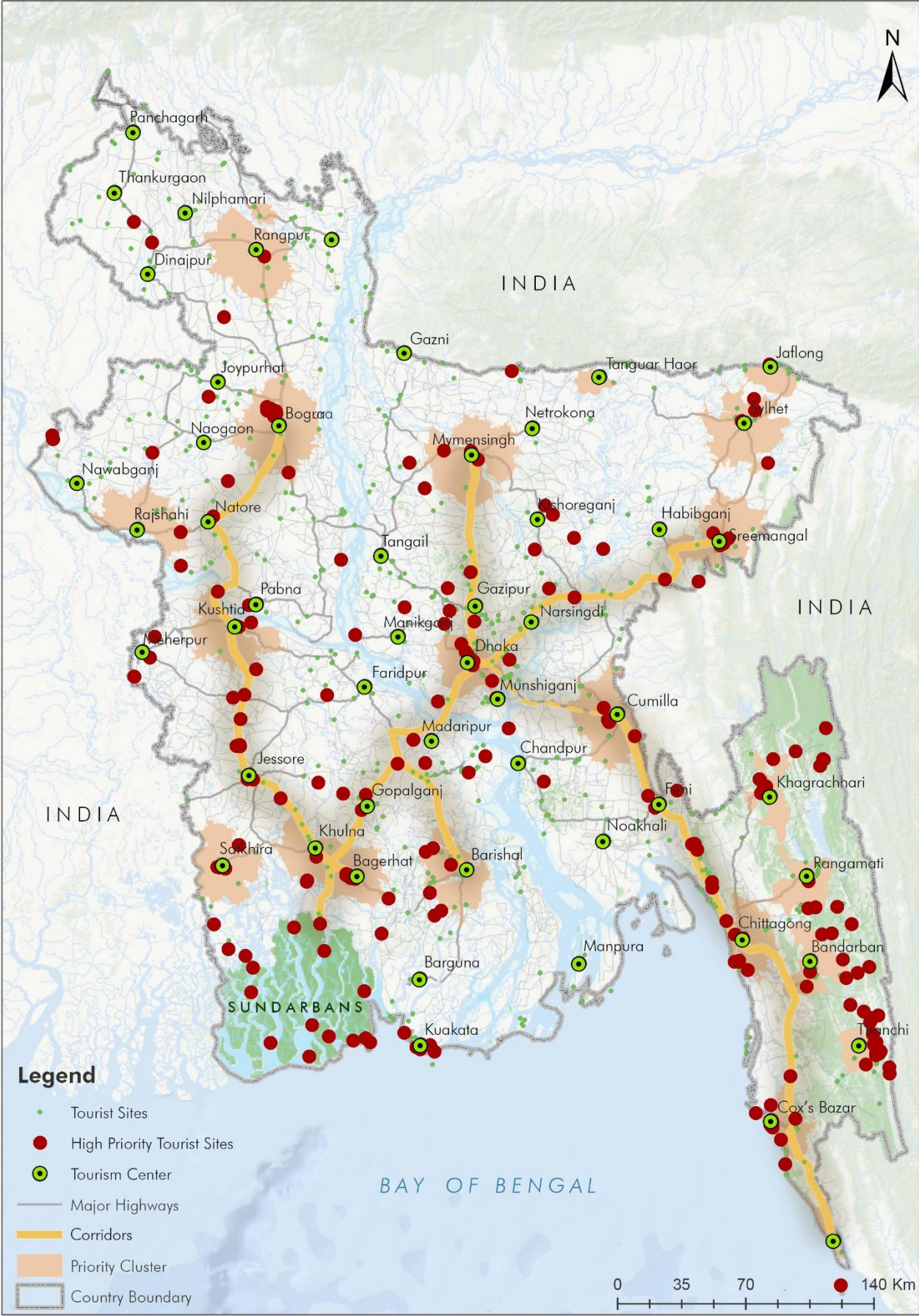
After spatially processing all of the preceding steps, clearly defined geographic tourist clusters are delineated. As a result of the analysis, 51 clusters have been identified for the project area as depicted in Thematic Map1. The clusters identified are prioritized using several of the parameters listed in Annexure IV. The clusters have been prioritized in order to facilitate development and investment during phase 1. A total of 22 clusters have been prioritized based on the identified parameters. A list and map on the prioritized clusters are enclosed in Annexure IV and Thematic Map 2.

Second, a thematic cluster connects a collection of assets with a marketable theme. The assets linked geographically may not be a thematic cluster. "Buddhist sites in Bangladesh," "gastronomic highlights in Bangladesh," and "trekking routes in Bangladesh" are some examples. Thematic clustering is a marketing technique which will help in extending the marketability of geographic clusters and encouraging visitors to spend more time (and thus more money) in Bangladesh. Therefore, Assets, for example, can belong to multiple thematic clusters. For Instance, a village in CHT with particularly distinctive local cuisine (Bamboo Chicken) and a remarkable Buddhist temple (Golden Temple at Bandarban) at the end of a steep picturesque forest path: the same asset can be marketed as part of a "Buddhist heritage" product for Buddhists from Japan or South Korea, "gastronomic highlights" for foodies from Europe, or "trekking routes" for adventure seekers from North America. The point is that the same asset can be marketed in a variety of ways to meet a variety of market needs, resulting in greater benefits to host communities from increased tourism activity and more diverse product innovation. In subsequent deliverables, this type of cluster will be described in greater detail.

Thematic Map 1: Delineation of geographic clusters across the country



Thematic Map 2: Identification of prioritized geographic clusters



4.3 Tourism Infrastructure

Bangladesh's natural landscapes range from rolling hills and tea plantations to beautiful rivers in deltaic plains, the world's largest mangrove forest in Sundarbans, and the world's longest beach in Cox's Bazar. Bangladesh possesses an abundance of natural beauty. Despite having the potential to flourish, Bangladesh's tourism industry continues to move at a snail's pace due to a number of obstacles. Inadequate tourism infrastructure is one of the primary causes for this. The World Economic Forum recently published a report titled "Travel and Tourism Competitiveness Report 2019." In terms of tourism service infrastructure, Bangladesh ranked 133rd out of 140 nations. However, despite the presence of such tourist-friendly destinations, the country lacks a variety of high-quality leisure accommodations, failing to attract both international and domestic tourists. Inadequate infrastructure, lack of security and safety, lack of effective communications and transportation, lack of adequate hotels, motels, and restaurants, etc., are among the most significant obstacles to the sector's sustainable development. Existing loopholes in tourism sectors pose substantial obstacles to the future development and sustainability of the sector. To make the tourism industry a major contributor to Bangladesh's GDP, tourism infrastructures must be improved. In the following paragraphs, infrastructure-related issues and recommendations for addressing them will be elaborated.

4.3.1 Accommodation

Issues & Potential

The accommodations in Bangladesh range from small boutique hotels to large international chain hotels. Affordability, a lack of training and skills in the hospitality sector, and underdeveloped community homestays are the region's primary concerns. In 2015, TripAdvisor rated Bangladesh's hotel quality as 4.6 out of 5 stars. Despite the availability, quality, and a large number of illegal hotels, which jeopardise the overall standard and quality of the hotel sector in the long run, are major concerns in Bangladesh. Currently, the majority of visitors to well-established tourist destinations are day-trippers or short-stay guests. The limited variety and quality of tourism facilities, such as accommodation, transportation etc., are among the primary causes of this trend. Major efforts should be made to improve and expand the range of tourism accommodations and services available. The best and most sustainable model for enhancing the variety and quality of tourism accommodations, transportation, and other services has proven to be private sector ownership or partnerships. Partnerships between the private sector and the government or local communities should also have encouraged.

Future development and marketing efforts should also focus on expanding Bangladesh's products and image to segments with higher spending power who seek relaxation and wellness in a pristine environment. This could include family recreationists engaging in outdoor activities (e.g., soft hiking, boating) and genuine community and nature-based recreation; upscale international explorers who thrive on eco-heritage experiences (including expatriates living in Bangladesh); and special interest groups such as climbers, hikers, and river rafters. These segments require accommodations in all price ranges, ranging from home stays to high-end facilities. Bangladesh is less prepared to receive these tourists at this time, and more investment is required in the near future despite the fact that they could provide greater value.

Other tourism touch-points should also be made eco-friendly, especially accommodations. Green criteria/standards should be designed to monitor the level of eco-friendliness in hotels and other accommodations. In underexplored destinations, eco-lodging should be encouraged to better support the ecotourism position in the destination.

Strategies

1. TI -1.1: Support the growth of unpopular but potentially lucrative travel segments, such as long-stay tourism

Rationale: Adjusting regulation to facilitate time-sharing of accommodation to support seasonal getaway segments and to allow long-stay foreigners to work part-time (or full-time) in more industries could elevate the attractiveness of Bangladesh for these targeted groups. Further relaxing regulations on capital and asset transfers across borders, such as car import duties, should also be considered.

2. TI-1.2: Promote specialized skills training to support the development of multi tourism segments

Rationale: There are numerous tourism segments in Bangladesh, including new segments with rapid growth. There are currently no standard courses or specialised training programmes that equip workers with the necessary skills. Bangladesh has the potential to attain a dominant position by enhancing its training facilities and programmes for workers with these specialised skills (with a focus on women and youth). The public sector should seek out partnership opportunities with the private sector in each tourism sub segment, including luxury accommodations, community homestays, and allied infrastructure. The collaboration should also be expanded to the regional level in order to establish regional training institutes and position Bangladesh as the dedicated market leader in the segment.

4.3.2 Transport (air, road, water) and public transport

Issues & Potential

The transportation system is comprised of roads, railways, inland waterways, seaports, maritime shipping, and air transport, and is designed to accommodate both domestic and international traffic. The current transportation network of national highways, regional (i.e., divisional) highways, zila (district) roads, and rural roads is impressive, though there are issues related to quality and operational efficiency, maintenance, and the lack of intermodal interface and connectivity. The road network accounts for the bulk of passenger and cargo traffic, while the lower-cost rail and inland water alternatives lag far behind.

According to the 2017 Statistical Yearbook, there were 19,759 km of paved roads, 2,877 route-km of railways, and 4,335 km of navigable waterways, which increase to approximately 6,000 km during monsoon season. In addition, there are two seaports, three international and twelve domestic airports (5 are in operation, 3 need prior approval for operation, 3 are out of service and one is under construction). Despite the transportation system's substantial expansion over the years, it remains inadequate. In GCR 2018, Bangladesh was ranked 121 out of 140 on road connectivity index and 111 for quality of roads; 93 for efficiency of seaport services; and 63 for airport connectivity and 109 for efficiency of air transport services. It performed better on railroads parameters: 40 for railroad density and 68 for efficiency of train service. The congested roads, seasonal flooding, limited transportation alternatives, etc., pose a serious threat to the convenience of access for both domestic and foreign tourists.

Strategies

1. TI-2.1: Support the development of unpopular but promising travel segments, such as river tourism

Rationale: Bangladesh is endowed with numerous waterways across the country. This network has served as the people's mode of transportation and lifeline. With this in mind, Bangladesh has the opportunity to best exhibit the riverside Bengalese way of life by designing various river tourism routes, particularly along the Padma River, the Shitalakhya River, etc. Local riverside communities should be given the opportunity to participate in the creation of riverside attractions in order to strengthen community collaboration and add a greater sense of authenticity to the tourist experience. In addition, man-made attractions could be expanded at certain stops along the route, particularly at or near Dhaka. This will increase the diversity of river tourism and reduce the pressure on cultural and community attractions in the event of large tourist influxes. Consequently, actions should be taken to guarantee environmental sustainability for the sustainable mode of transportation. In addition, climate-resilient considerations should be incorporated into all infrastructure development and other investment decisions. Examples include flood-resistant infrastructure for riverbanks and transportation systems, the promotion of a multimodal transit system, the promotion of renewable energy sources, and the development of bicycle lanes, among others.

2. TI-2.2: Develop air transportation networks for incoming tourists, including upgrades to international airports and the addition of direct international flights to Bangladesh's major cities

Rationale: This strategy focuses on developing the necessary infrastructure and facilities to support the expansion of the tourism industry. The focus is on transportation conveniences, tourist facilities and amenities, tourist safety and security. The Hazrat Shahjalal International Airport is the most crowded of the three international airports, and its level of service is deteriorating daily due to poor management, and its space is insufficient to accommodate the current volume of travellers. In order to accommodate the growing number of domestic and international passengers and cargo, the Hazrat Shahjalal International Airport in Dhaka, Bangladesh, is currently undergoing expansion. It will increase the airport's annual passenger handling capacity from eight million to approximately twenty million, and its cargo capacity from two hundred thousand tonnes to half a million tonnes.

However, restrictions at air transport facilities, such as international airports, have caused immigration difficulties for tourists. Bangladesh has the opportunity to increase the number of destinations and frequency of direct flights. Subject to market demand, more direct medium- and long-haul flights should be promoted from key origin countries to Khulna and Cox Bazar. Consideration should be given to expanding the capacity of secondary airports to meet the excess demand and alleviate the strain on the primary airports in order to accommodate the growing number of incoming tourists. In addition, domestic flights should increase code-shares with international airlines in order to allow through check-in or direct transfers to divisions that lack sufficient volume to establish direct international flights. Bangladesh still needs to improve the quantity and quality of its airport infrastructure in order to become a BIMSTEC hub.

3. TI-2.3: Support and enhance efficiencies and conveniences in traveling to Bangladesh via land and water transport

Rationale: There are numerous land and water border crossings between Bangladesh and its neighbours. Several issues, including limited and misaligned opening hours, less generous visa rules than upon air arrival, and lengthy lines, have been reported as impediments to the convenience of land border crossings. Improvements are critical in supporting tourism at border areas and in the development of multi-country tourism corridors.

4. TI-2.4: Optimize domestic air transport to improve connectivity between primary and secondary cities

Rationale: The limitation of airport access is one of the hindrances to develop the secondary areas into key tourism attractions. The expansion of air transportation capacity should prioritise cities with a high potential for tourism. In addition to improving its capacity, Bangladesh can consider enhancing the tourist experience by developing air transport facilities such as air bridges, more efficient baggage claim belts, and self-check-in counters, as well as airport services and amenities such as restaurants and shops. Also, developing mini airports or small aircraft transport facilities for the exclusive economic zones (EEZ) and Exclusive Tourism zones (ETZ) to attract the foreign tourists in these specific locations.

5. TI- 2.5: Improve domestic land transport such as extensions and improvements of motorways, to promote safety in traveling for tourists as well as establish shuttle bus systems that cover key tourist attractions

Due to poor domestic connectivity, tourists visiting Bangladesh are concentrated in few destinations near the airports. Based on the 22 prioritized cluster, tourism corridors will be developed to showcase attractions in each region, including community-based tourism surrounding local communities. Currently, options to travel between cities are limited by inadequate bus services, expensive taxis, and limitations of railway/ water transport networks. In addition, the quality of motorways in many regions is still poor. Thus, an initiative to improve the overall intra-country transportation experience is important to support the distribution of tourism benefits and induce longer stays in Bangladesh.

6. TI -2.6: Improve rail transportation network through development of network covering destinations across Bangladesh and connects with neighboring countries as well as the standard level of travel supporting facilities

The 2,877.10 km rail network includes broad gauge, meter gauge, and dual gauge tracks, and encompasses international, intercity, and suburban rail routes. In 2014–2015, 67 million passengers travelled through the Bangladesh rail network. There are existing and proposed rail links between Bangladesh and India. There are no rail links to Myanmar, but one from India to Myanmar via Bangladesh has been proposed. It should be noted that the government's new Railway master plan to be implemented in 6 Phases over the period

spanning from July 2016 to June 2045, BDT 5,53,662 Crore railway master plan grant assistance by ADB, approved in 2018, includes 230 ambitious projects designed to fundamentally transform railway travel in Bangladesh.

7. TI-2.7: Promote intra-city transportation such as Hop-on Hop-off bus service and improvements of quality of transportation services as well as widening the choices in travel

Dhaka is the most connected city in Bangladesh, however, tourists travelling to or within Dhaka still faces many problems with the public transportation. Buses are the most prominent mode of public transportation, which connect to the old town. However, the bus system is mostly archaic and inconvenient with no comprehensive English route maps published at the bus stops or online. All of the transportation services only accept cash and do not offer single ticketing alternatives to cover major mode of transportation around the city. There is need to provide dedicated local transport like Hop-on Hop off transport for tourists in the major tourist cities like Dhaka, Chattogram, Cox's Bazaar.

8. TI-2.8: Develop and improve apps that facilitate and provide nationwide comprehensive information across all modes of transportation

Increasing numbers of tourists are choosing to travel independently, giving rise to a new market segment known as "Free Independent Traveler" or FIT. The FIT market is expanding rapidly worldwide. Individual travelers enjoy planning and booking their own trips and navigating Bangladesh independently. Moreover, tourists prefer online channels for trip research and planning, as evidenced by the global expansion of online tourism providers. In light of shifting tourist preferences toward online alternatives, Bangladesh should prioritise enhancing its online tourism presence and delivering the expected online services.

4.3.3 Facilities (restaurants, toilets)

Issues & Potential

Based on our site visits, it was found out that most of the sites lack basic infrastructure facilities like toilets, dustbin, accessibility of physically challenged people, signage, safety securities etc. As a result, hygiene is a big concerning issue for the tourists visiting these sites. In 77% of the sites waste management system is very poor as these sites don't have any dustbin available within the sites. Beside this only in 51% of the site's toilet facilities is present and among these very few are in good condition. This shows how poor the sanitation condition is in the tourist sites. All these lacking eventually discourage the tourists in revisiting the sites.

Even though many of the sites lacks in providing good quality infrastructure facilities, the attributes and importance of the sites makes it appealing to the tourist. This proves that if better infrastructure facilities can be provided then more tourist will be get attracted to the sites and certainly foreign tourist can be attracted too. So, considering the potentiality of the sites, if facilities like toilet, garbage bin, security, drinking water etc. can be ensured, then drastic positive change can be observed in tourist influx.

Strategies

1. TI-3.1: Developing Signage as per international standards

Rationale: This strategy highlighting the necessity of having a proper well design signage system. Both the location and design of the site is very vital as this will invite and guide the tourist to visit a place, using facility etc. For making the tourist sites location easily accessible the district and regional level office of Tourism board or the district collector's office should communicate with the RHD and LGED (the road construction authority in Bangladesh) regarding installation of signages for destination of the tourist sites on national highway, regional roads, feeder roads, village roads etc. Beside this for signages on facilities and amenities on individual sites concerned responsible department needs to take initiatives. Good infrastructure facility is one of the key components in attracting tourist. But many a times during the survey the survey team found that even though some sites have good infrastructure facilities but those are not displayed or indicated properly at the site. As a result, sometimes tourist find it difficult find those facilities and so can't use those facilities. So having a well design signage system is very important.

By installing well designed and informative signage boards at the public places like Entry and Exit points of Airport, Rail Station, Bus Station, River/Sea Port/landing stations tourist can be benefited greatly. It will be easier for the foreign tourist to decide the routes and they won't get overcharged by the local taxi drivers as they will have the necessary information regarding the site's location.

2. TI-3.2: Boosting service quality of public restrooms and waste management facilities at tourist destinations:

Rationale: This strategy is targeting to improve the availability of the basic infrastructure facilities that need to be present at the tourism sites to make the journey of the tourist comfortable. Hygiene and cleanliness is one of the prerequisites if Bangladesh wants to attract tourists from developed countries like Europe, USA, Canada, Australia etc. because tourists from these countries are very concerned about hygiene. Whereas the scenario is completely opposite in Bangladesh. So, boosting up the service quality of the infrastructure facilities is very vital. Only providing facilities will not be enough at the same time initiatives need to be taken to increase awareness among the local tourist also in using the sanitation and hygiene related facilities so that a healthy environment at the tourist spot.

3. TI-3.3: Improving safety services to maintain visitor confidence:

Rationale: Strategy regarding safety and security of the tourist is very vital because without having a safe and secured environment, desired number of tourist influx cannot be achievable. It doesn't matter how good the site is. For all the tourists (international and national), security related strategy needs to be taken so that they can feel comfortable during visiting any sites. For the tourist spots, including reserve/protected areas, where the network frequency is being restricted for the preservation of nature and animal, the forest dept should provide good quality security facilities along with walkie-talkie so that the foreign tourist doesn't feel insecure in deep forest and if necessary, can communicate with others.

4.3.4 Communication and Information

Communication and information are very vital in any service industry and there is no exception for tourism industry also. A good communication and information system can make a tourist's vacation more enjoyable by making his/her travel more homely and comfortable. This can only be possible when tourist can communicate freely and have all the necessary information about the place, they are travelling or willing to travel.

Issues and Potential:

Communication and information are very vital in any service industry and there is no exception for tourism industry also. A good communication and information system can make a tourist's vacation more enjoyable by making his/her travel homelier and more comfortable. This can only be possible when tourist can communicate freely and have all the necessary information about the place, he/she is travelling or willing to travel. At this modern era of internet when everything is online, providing a good quality internet service to the foreign tourists at the different transportation hub like airport, Bus terminal, Railway station, ports etc. is a must. But in Bangladesh this type of facility is hardly available except in the international airport. And wherever the internet facility is available it's not working properly. Therefore, most often after landing into the airport the foreigner finds it very difficult to arrange vehicles, travel tickets, hotel etc. by themselves and so they had to rely on others. Beside this, Although Bangladesh is trying to attract foreign tourist more than ever before, still it has not established good quality services for the industry. One of the basic facilities for serving the tourist in a better way is availability of organized Tourism information Centre (TIC) from where the tourist can have all the information, he/she needs regarding sites, hotels, guides, ticketing, transport facilities etc. It's like a one stop service centre with all the required information centre. But there is hardly any TIC available and if exists, the existing ones don't have up to date information. Moreover, still now visitors and tourism related data has been collected manually which is an error prone process and this needs to be updated.

There are positive signs for the Bangladesh as current prime minister Sheikh Hasina's government is working towards the vision 2021 of developing a digital Bangladesh for the future generation. In every government department this upgradation to digitalization is going on. So, it's very certain that over time the tourism industry will started to use the latest ICT technologies and this will certainly help the tourist in getting updated information regarding sites facilities more easily.

Strategies:

1. TI-4.1: Combining elements of the latest ICT technologies, for data collection and analysis

Rationale: This strategy will help the tourism industry in modernization and developing at a pace as per with the modern smart era. Now a days everything is getting digitize and automated. This also increasing the accuracy and efficiency. So, for the flourishment of the tourism industry of Bangladesh government needs to adopt contactless data acquisition technology for acquiring real-time visitor information/feedback at entry and exit points. Beside this, government needs to facilitate knowledge transfer and strengthen digital competence particularly among tourism MSMEs and regional/local governance bodies. These actions will help to harmonise the activities taken for the development of tourism.

2. TI-4.2: Improve information availability for tourists at tourist destinations/public places

Rationale: This strategy is targeting the necessity of a well-equipped single information point from where an individual tourist can get all the information related to sites, transport facilities, hotels, tour guides and operators etc. By developing Tourist Information Centre (TIC) at the important public places like airports, rail stations, bus terminals etc. BTB can offer a one stop kind of service to the foreign tourists that helps them to make their travel and vacation more enjoyable and comfortable. This type facility will certainly help Bangladesh to attract more foreign tourists also. Because through this type of centre the foreign tourist will get all information before hand and this will make their trip safer and will help them to avoid any unforeseeable event to some extent.

3. TI-4.3: Develop and improve apps to better facilitate tourists

Rationale: Every day the number of smart phone users is increasing and to cope with this modern era of smart world, this type of strategy of developing apps is a must. This strategy is focused on the offering the tourists all the tourism related information within their palm of their hand. the Tourism Board should develop an app for tourist including all the information related to sites, transport facilities, hotels, tour guides and operators etc. in multiple language (at least in source country's language from which higher number of tourists visit Bangladesh every year), so that any foreign tourist travelling to Bangladesh can have all the tourism related information in one place. This will certainly help the tourist to travel alone also without assistance for tour operators.

4.4 Capacity

4.4.1 Institutional arrangements for tourism management in Bangladesh

Successful tourism requires partnership and innovation. In an open society, the public sector has an enabling and facilitating role. The public sector can help facilitate success by ensuring an operating environment that encourages and nurtures enterprises (private or otherwise) to deliver sustainable social and economic benefits to communities. Although Bangladesh has an elaborate institutional infrastructure which governs/regulates its tourism industry, there are some gaps which need to be bridged in order to arrive at a tourism output commensurate with the actual potential of the sector in the country. In this section we analyse those gaps and recommend specific strategies to overcome these deficiencies.

Issues & potentials

The Governance apparatus for tourism in the country has some critical shortcomings. The National Tourism Council (the “apex body”) seldom convenes and therefore needs institutional reform. The Ministry of Civil Aviation and Tourism is concurrently running an airline (Biman Bangladesh), which takes up a lot of its resources and time; two of its important wings, the Bangladesh Tourism Board and the Bangladesh Parjatan Corporation, sometimes have functional overlap and inadequate resources. BTB has little authority over tourism activities in areas coming under the jurisdiction of the Forest Department (such as the Sundarbans), or tourism activities at heritage sites under the care of the Ministry of Religious Affairs and/or Ministry of Cultural Affairs.

Moreover, BTB has no statutory role in tourism projects conducted by BEZA, BIDA or BPC. The quality of services at hotels and motels run by BPC, needs to be made significantly better. Similarly, facilities offered at various airports in the country and passenger services of Biman Bangladesh Airline, needs a lot of improvement. Despite being the National Tourism Board, BTB has no influence in determining the visa policy or investment promotion in relation to tourism product and market development, and has no statutory right to visitor and economic data held by the police, immigration department or statistical agencies, which means that it is unable to plan adequately. Although there is an embryonic plan to establish a network of tourism officers in every district of the country, however desirable it might be, there is no statutory footing for such an initiative³¹. MoCAT and its various departments are staffed by career civil servants with effectively no support from technical experts in the field of travel and tourism. Policy cohesion needs to be drastically improved between Government departments and also between central and local (division/district/upazila) Government organs.

On the brighter side, there is growing political commitment towards undertaking the much needed institutional and structural reforms. This is complemented by the fact that a burgeoning private sector in tourism is vocal about taking up more responsibilities in terms of involvement in high level decision making related to the travel and tourism industry in the country. This potential needs to be leveraged.

Strategies

1. IR-01: Re-establish the National Tourism Council (NTC) as a PM-led Cabinet Committee

Rationale: It would be mandated to facilitate inter-ministerial coordination, undertaking necessary strategic decisions and steering the entire task of advancing tourism development in the nation. The council should have representations from Ministries involved in tourism development like Ministry of Culture, Ministry of Environment Forest and Climate Change etc., with Minister of tourism as Member Secretary and CEO, BTB as a Member. The committee should meet every three months and must undertake regular monitoring of implementation of its decisions.

This is needed to ensure that the NTC maintains regular monitoring and supervision of actions taken by responsible agencies in pursuit of the decisions arrived at its meetings. This regular monitoring and periodic review of important decisions taken at the NTC is missing at present.

2. IR-02: Creation of a separate tourism division under MoCAT

Rationale: It would have the overall responsibility for policy and regulation and specific responsibility (via renewed NTC) for tourism in Protected Areas (including National parks, heritage sites and the CHT). Inter Ministry coordination mechanism for this has to be established. BTB can continue to function as the National Tourism Organisation (NTO) under this division. In the immediate term, MoCAT will have two divisions: one for tourism (Department of Tourism) and another for civil aviation. In the long run, a Tourism ministry will be established. There will also be collaboration with other ministries such as cultural affairs and the environment, forest and climate change etc. BTB and BPC will be sent by the Ministry of Tourism. The Bangladesh Tourism Board will be manned by dedicated tourism cadre, a tourism sector CEO and private sector involvement. The Board will be active in all key markets, whilst the Bangladesh Parjatan Corporation has evolved into a one-stop-shop tourism development agency

³¹ Feedback from stakeholder consultations

3. IR-03: Transform BTB as a tourism board with elaborately defined roles and responsibilities and increased Private Sector representation

Rationale: It would be funded by a donor agency, seed funding, government grant, with responsibility for marketing of tourism, planning and statistics, promotion and facilitation of events and certification of tourism providers. Although there are representatives from the Private sector in the Board of BTB, their involvement in essential decisions taken by the Board is not sufficient. This can be changed by increasing participation of the private sector in the board.

The BTB should also have more (financial and human) resources than the department currently has. BTB should be represented on the (advisory) boards of other key bodies, such as BEZA and BIDA. The Board will function as the technical body of the proposed Ministry of Tourism and its roles and functions will be properly defined under the proposed National Tourism Act (described later in the section on Legislative Arrangements.)

4. IR-04: Initiate a programme to Privatised public assets in civil aviation (including Biman Bangladesh Airline):

Rationale: There is a long history of successful privatisation/disinvestment of National Airlines. British Airways, Lufthansa (German), Qantas (Australian), Air France, KLM (Dutch) to name a few. Air India is only the latest in this long and illustrious list of National airlines which have undergone successful privatisation and, in some cases, subsequent consolidation in the form of mergers and acquisitions (Air France -KLM, Lufthansa – Swiss Air). These examples have shown that privatisation can significantly improve performance and service quality for the international carriers.

Government of Bangladesh should take a cue from this and consider either:

- Disinvesting some of its stake in Biman and allow a private airline to partner with it. Bringing in an experienced airline partner can help improve management and operational aspects of the airline.
- Completely privatising its National Carrier, which will not only improve customer service but also be a clear indication to international investors that the Government of Bangladesh intends to carry forward its economic reforms' agenda.

Obviously, these are big ticket reforms and any movement on this can only be achieved after undertaking thorough feasibility studies, exhaustive stakeholder consultations and awareness generation programmes for the common citizens, so as to create a favourable public opinion towards these changes.

5. IR-05: Initiate a programme to increase private sector participation in operation of BPC assets like Hotels, Motels, etc.

Rationale: Feasibility studies should be undertaken for considering the possibility and modes of possible private sector involvement in the operation of assets of the BPC including hotels and motels. PPP can be considered as a viable model for this. Subsequently, the possibility of privatization of these assets must be considered in line with acceptable global norms. Making use of world class Transaction Advisory services can ensure successful PPP/Privatisation of these assets. BPC could evolve in to a role of a Master Developer for tourism investment leveraging the impressive land bank they possess. Ultimately, the aim of the Government in a competitive economy should be to provide supervision and facilitation to the private sector in order to encourage healthy competition which incidentally results in significant quality improvement in the services offered to the customers.

6. IR-06: BEZA/BIDA (or equivalent) to provide a one-stop-shop for tourism investors,

Rationale: BEZA/BIDA (or equivalent) to provide a one-stop-shop for tourism investors, including simple procedures to approve development, facilitate "last mile infrastructure". This will improve the ease of doing business and incentivise foreign and domestic investments in the tourism industry. This body should have representation from the BTB in order to advise on matters relating to investments in the tourism sector.

7. IR-07: Divisional Level Offices of the BTB/Destination Management Organizations (DMO)

Rationale: Divisional level supervision mechanism for tourism related projects needs to be developed. There is a lack of coordination between the centralised planning activities and ground level execution of key tourism projects. To plug this gap Divisional level offices Tourism Authorities (DTA) should be established with representation from BTB, Divisional and District administration, concerned line departments and the central BTB in order to improve programme delivery at field level. Representation from local level NGOs, private associations involved in tourism and other civil society organisations is encouraged. Necessary legislative arrangements regarding the same has to be made part of the new BTB Act. Salient points about the proposed DTA are as follows:

- To be responsible for divisional level coordination of all tourism projects approved at the national level
- Responsible for divisional level coordination with all line departments involved
- To supervise the functioning of District level tourism committees and the District Tourism Cell.
- To be chaired by the Divisional Commissioner
- To include the DCs of concerned districts
- To include a nominee of the BTB
- To include Subject Matter Experts via invitation
- To include Local Industry Representatives/NGOs/CSOs etc.

4.4.2. Enabling Environment

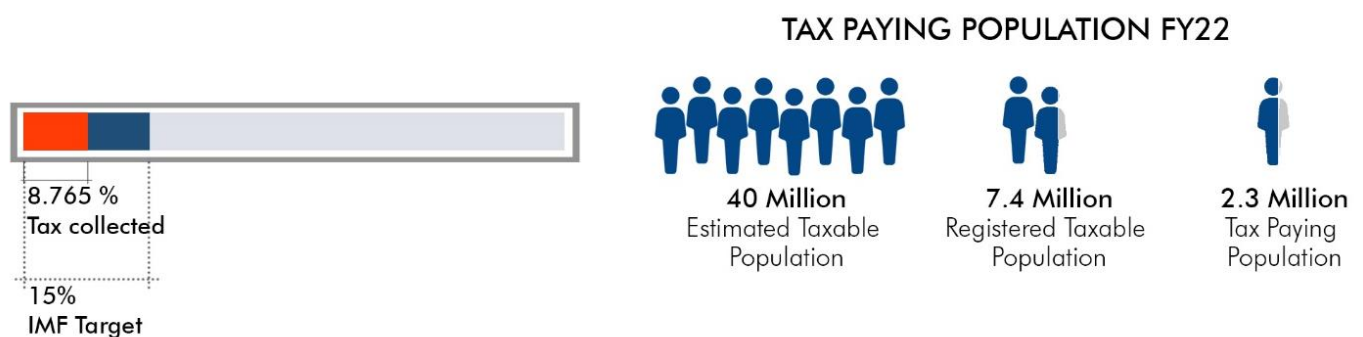
4.4.2.1 Taxation

Tax structure of a country plays a key role in determining its development and growth prospects. Outlook of investments in any given economy are driven by its taxation policy as it has a direct impact on the profitability of the business. Though, it is essential to ensure a balance between reduction of tax rates and overall tax collections as tax revenue forms the basis for potential of government to finance development projects and enable growth of various industries in the economy.

Issues and Potential

1. Low Tax Revenue and Collection Efficiency

Total tax collection of Bangladesh stands at 8.765%³² of its GDP which is significantly lower than countries at a similar stage of economic development. IMF suggests a target of 15% for tax revenues against GDP for improving investment outlook and demonstrating the financial capability of the Government. According to the National Board of Revenue, only 2.3 million citizens (1.3% of population) out of the 7.4 million registered individuals filed for a tax return in FY22. Though it is estimated that the actual number of people who qualify for paying taxes stands at around 40 million³³.



³² World Bank Data

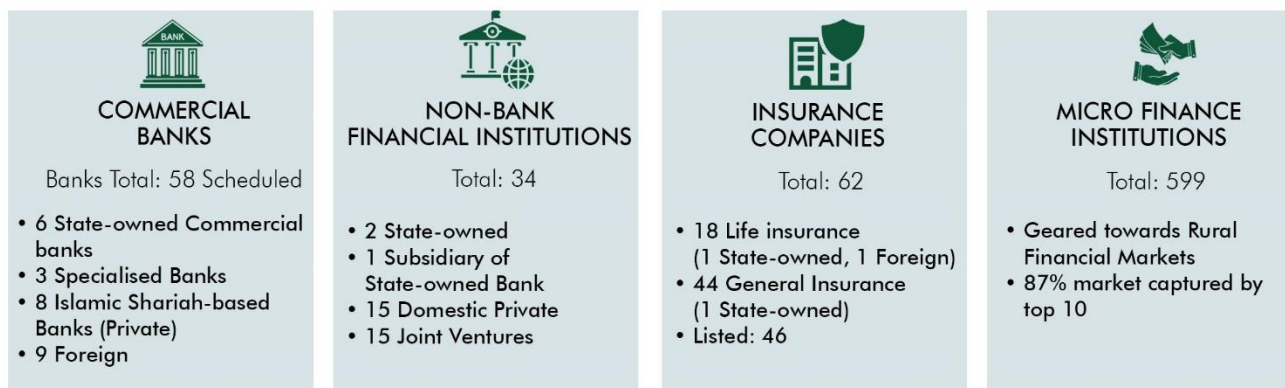
³³ National Board of Revenue

2. Minimal Tax Incentives for Tourism Industry

- Though the national tourism policy touches on tax incentives to the tourism and hospitality industry, no significant headway has been made in the last decade regarding the same
- BEZA has ear-marked three areas as 'Special Tourism Zones' and is offering tax incentives to developers, though to meet the targets of tourism development the incentives at policies are required at a national level during early years of the industry growth
- No tax incentives to domestic and international tourists with respect to expenditure towards tourism activities in Bangladesh or towards any form of tourism such as MICE, NBT etc.

4.4.2.2 Financing

Businesses in Bangladesh have adequate access to funding from local financial institutions for short and long-term investments including loans for working capital, syndication and trade financing. Foreign entities also have access to on-shore and off-shore funding facilities.



Source A: Destination Bangladesh, PWC

Issues and Potential

1. Commercial Status of Tourism and Hospitality Projects

Tourism and hospitality infrastructure projects are currently deemed as purely commercial operations leading to stringent terms and higher cost of borrowing and limited access to specialized financing

2. Absence of Financial Institutions with Focus on Tourism/Hospitality

- No government backed specialized financing institution for tourism/hospitality infrastructure projects
- Limited support for MSMEs providing tourism and/or hospitality services due to archaic book-keeping and record retention process leading to high uncertainty and unverifiable proof of affordability

Strategies

1. Digital Overhaul of Taxation System for Improved Tax Collection (BI-01)

Rationale:

- Enforced or incentivized adoption of digital point of sales systems linked for improved tracking and traceability
- Synergy between National Board of Revenue and other departments through digitized data transparency for identification of tax evasion cases
- User friendly tax computation and return filling process by adopting state of the art web-based tools as part of e-filing process
- Improved vigilance and audit mechanisms to increase identification of tax-evasion and exemplary action for noted cases

2. Introduction of Tax Incentives for Tourism Industry (BI-02)

Rationale:

- Tax holidays (with appropriate sunset clause) for various tourism and hospitality infrastructure projects in line with those offered to manufacturing, IT and power sectors with limited yet adequate sunset clauses
- Limited tax incentives to local tourists against domestic travel receipts as deductible from income³⁴
- Reimbursement of VAT paid by foreign tourists during visit to Bangladesh
- Partial tax exemptions for foreign firms organizing corporate events and conferences in Bangladesh to promote international tourism
- Reduced tax rates and/or subsidized financing terms for MSMEs providing tourism and hospitality services as incentives for digitization and adoption of green practices
- Accelerated Depreciation, and other benefits to be provided for select projects

3. Infrastructure Status for Hotels and Other Relevant Tourism Projects (BI-03)

Rationale: Hotels, cruises, amusement parks and other capital-intensive tourism projects to be granted infrastructure status in order to enable access to cheaper loans and financing for longer terms and attractive refinancing possibilities from specialized lenders such as Bangladesh Infrastructure Finance Fund Limited (BIFFL). Further, grant of infrastructure status to hotels and other hospitality projects would allow them to avail the tax exemption under section 46CCC of Income Tax Ordinance for 10 years

4. Formation of Government Backed Specialized Tourism Financing Unit (BI-04)

Rationale: Government funded financial institution(s) to be set up in order to provide specialized financial assistance to tourism and hospitality developers. The services offered will also include technical and financial advisory services apart from financing [Eg. Tourism Finance Corporation of India Ltd.]

5. Access to Finance for Tourism Related MSMEs, including Homestays (BI-05)

Rationale:

Facilitating capital and credit to Tourism MSMEs –

- capital subsidy to the tourism hospitality projects and other tourism products at par with such incentives being extended to manufacturing industry.
- schemes which provide credit guarantee to MSMEs including tourism sector enterprises

Specific financing schemes for SMEs in travel and tourism via Scheduled Banks

6. Exploring Multiple Funding & Financing Options for Development of Tourism Products (BI-06)

Rationale:

- **Public Sector** – Development of necessary infrastructure could be undertaken through public sector funds including Direct Funding (Grants, Loans) and Indirect Funding (tax incentives)
- **Private Sector** – Development of financially feasible, and revenue generating hospitality projects could be undertaken through Private sector funds such as Project Financing, FDI, PE/VCS/Investor Networks
- **Public Private Partnership (PPP)** – Additionally, development of infrastructure and revenue generating projects could be undertaken through the PPP model including viability gap funding to make the projects commercially viable if necessary. Financially feasible PPP projects could yield fiscal benefits to the government, in form of revenue share or annual concession fee from the concessionaire.
- Other funding sources include funds from bilateral / multilateral agencies towards development of support infrastructure
- The key determinant to success is proper identification of suitable projects for each mode of development to optimize expenditure of public and private funds, while effectively utilizing private sectors development and operational expertise.

³⁴ Tourism Masterplan of Thailand, 2016 (Annexure 2)

4.4.2.3 Ease of Doing Business (Registrations)

Setting up and running a business in Bangladesh is considered to be an immensely challenging task. The World Bank ranked Bangladesh at 168th position out of 190 countries surveyed as a part of its 'Ease of Doing Business' rankings in 2019 (up from 176th in 2018, ahead of only Afghanistan amongst other south Asian economies. This improvement was driven by reforms taken up by the Bangladesh Government in the form of lowering business registration fees, reduced cost for obtaining an electrical connection in Dhaka and most significantly an improved access to credit information from the Credit Information Bureau.

Issues and Potential

1. Complex Regulatory Environment

Requirement of multiple approvals from different departments for building construction. It takes on average over 24 months to get all permits. Additional permits are required for hotel operations which need to be renewed on a yearly basis. All said permits need to be applied for in a sequential manner leading to a cumulative time of over 5 to 6 years for hotels to commence operations.

2. Challenges Regarding Land Acquisition for Tourism

Difficulty for developers to find appropriate land parcels with clear titles and land use permissions. Land conversion usually takes 12 to 24 months on average further deterring private institutional investments.

3. Poor Insolvency and Bankruptcy Resolution

Bangladesh ranks 154th in the 'Resolving Insolvency' metric. An average recovery rate of 29.1% and an average of 4 years taken for resolving related disputes leads to a poor financing environment, limiting initial access to financing as lending institutions are unwilling to take additional risks specially in the case of MSMEs with limited access to reliable collaterals.

Strategies

1. Detailed Review of Business Registration Process (BI-07)

Rationale: Rigorous audit of business registration process is required for identification of key bottlenecks including but not limited to the complexity of documentation and paperwork requirements. Possibility of deemed approvals, auto-renewal and/or decentralized verification for low impact permits must be explored along with a shift to end-to-end digitization of application process with primary focus on improving the capacity and funding of RAJUK and other City Development Agencies. Pre-approved projects should be included in bouquet of investment opportunities to aid development.

2. Consolidation of Available Land Parcels (BI-08)

Rationale: The concerned authorities must engage in a nationwide survey of land parcels and clearing their ownership status. Records to be digitized, regularly updated and made accessible to investors for easing land identification process. Additionally, the authority must target to demarcate appropriate government owned land parcels for development of tourism infrastructure via Public-Private Partnerships while setting creating an inventory of surplus land for promoting land pooling and leasing activities.

3. Overhaul of Debt Recovery Process (BI-09)

Rationale: Revision of national bankruptcy law for stringent restrictions on defaulters and setting up of special tribunals for speedy processing of bankruptcy and insolvency cases above a reasonable threshold value. Focus on enabling stronger collaboration between banks and financial institutions regarding borrower activities, debt servicing records, availed credit and collateralized assets.

4.4.2.4 Safeguards & Management

When well-managed, tourism has huge potential to contribute to sustainable social and economic development in destination communities, helping to advance all 17 SDGs. However, without appropriate management, tourism can create significant negative impacts and undermine progress towards the SDGs. A safeguards approach can help to mitigate the risk of negative impacts, and encourage a focus on achieving positive outcomes, by managing risks and anticipating needs.

Certain risks and possible safeguards associated with tourism development are discussed below::

Issues and Potential

Tourism brings upon vehicular traffic for mobility, due to which the traffic volume in the region increases, the infrastructure may not be able to cope with the increased rush, thus leading to overcrowding, poor sanitation, which may further lead to diseases both to the tourists and local people. The intrusion of outsiders in the area may disturb the local culture and create unrest. The local people may copy the lifestyles of tourists through the demonstration effect, and the result could be the loss of native customs and traditions. The locals may get irritated due to tourist behaviour. Out of ignorance or carelessness, tourists often fail to respect local customs and moral values. Some people may enter into criminal activities to fetch easy money from tourists, which leads to increased crime and anti-social activities and loss of moral and religious values.

Any development requires some interference with nature. Overdevelopment comes at the cost of nature. There may be damage to the natural flora and fauna. Some developers might have a desire for displacement of local people for tourism activities, but there must be clear safeguards to ensure that developers' wishes never take precedence over the rights and needs of local people. With more people in the area, more natural resources may require, which leads to the depletion of natural resources. Waste disposal problems crop up, and without proper measures to handle this problem, it may worsen the situation. Due to more footfall, more transport, more noise, improper waste disposal, pollution increases in the area and disturbs the ecological balance of the region. So, there arises need to propose certain safeguards to reduce the risks associated with tourism development.

Strategies

1. SG-1: Development of tourism industry while ensuring healthy communities, promoting girl education, and enhancing livelihood conditions in the region

Rationale: Project related activities may directly, indirectly or cumulatively change community exposure to hazards. So, health of the community should be undermined while development of tourism projects and the risks should be mitigated. Also, a significant concern with major development projects is the change in the livelihood conditions of the local communities, which may force them to shift their primary occupation to service industry. There is a need to manage the risk of children (esp. girls) drifting out of education and into employment in tourism and hospitality, including the informal sector (including child labour and abuse). Girl education should be prioritised as they might end up into service industry at an early age, which is not good for the personal and sustainable growth of the region.

2. SG-2: Ensuring Cultural and communal integrity

Rationale: Tourism activities should be conducted in harmony with the attributes and traditions of the host regions and in respect for the laws, practices and customs; The host communities, on the one hand, and local professionals, on the other, should acquaint themselves with and respect the tourists who visit them and find out about their lifestyles, tastes and expectations; the education and training imparted to professionals contribute to a hospitable welcome

3. SG-03: Formulate national level regulations on tourism development within a goal to promote sustainable and responsible tourism development while safeguarding environmental resources.

Rationale: All the tourism projects or activities should be conducted or developed in a sustainable manner without impacting the local biodiversity and natural resources of the region. Wildlife corridors should be proposed to allow free movement of the wildlife and minimize the impact of tourism activities. Ensure all

projects get necessary environmental clearance before initiation and strict monitoring after clearance needs to be done with timely renewal of EC for all the projects. Guidelines for eco-tourism at national level to restrict tourism activities with clear articulation of carrying capacity and other interventions/roles and responsibilities.

4. SG-04: Information Disclosure and Stakeholder Consultation

Rationale: The project information including the foreseen impacts of the projects should be disclosed among all the stakeholders and proper consultation should be carried out. If ethnic population/communities fall into the vicinity of the project, they should also be consulted at every stage of the project development and if required relocation assistance should be given.

5. SG-05: Promoting sustainable tourism operations

Rationale: Resource efficiency and energy security can be a major issue in future for tourism industry. Guidelines for operationalization of tourism activities and tourist operators should be developed. There is also a need to establish national level guidelines for safety, operationalization, and ensuring quality of different activities. Additionally, green/eco quality standards should be developed for energy efficiency for all the tourist infrastructure like accommodation facilities and quality standards should be maintained such that waste can be managed and pollution can be eradicated.

4.4.2.5 Access and Movement, Visas and Permits

Bangladesh is currently ranked 103rd on the Henley Passport Index 2022³⁵; the number of visa free destinations accessible with a Bangladesh passport is 41. The Indian passport is ranked 83rd in South Asia, with visa-free travel (or visa-upon-arrival) to 60 countries. Myanmar's visa-free/on-arrival access to 47 destinations is better than Bangladesh's, despite the fact that Myanmar is ruled by a military regime.

Issues and Potentials:

Despite Bangladesh's efforts to attract more foreign tourists in order to make its tourism industry a more promising economic sector, the country's visa processing system has not been significantly modernised. For a significant number of international visitors, obtaining a visa and extending a visa remains challenging. Air transport infrastructure is among the strengths of Bangladesh tourism. The nation is at the central of the region and is servicing as a transit hub for many air transport routes, which make it easy and attractive to visit Bangladesh. However, the international airport capacity and quality are still behind regional leaders, such as Hong Kong and Singapore. Land border is another important point of entry, yet the convenience at land border is still far behind that of airport. Among the hindrances at land border are limitation of opening hours and less generous visa exemptions. This could bring down Bangladesh tourism competitiveness, especially at the rise of short-haul tourism from neighboring countries.

Strategies:

1. AM-1: Creating a tourist-friendly visa process

Rationale: The government should work to make the visa application process transparent and online. In the marketing section, a list of countries from which Bangladesh receives the greatest number of tourists has been mentioned. Nepal and India are the only targeted source countries that are not offered On Arrival Visas, despite the fact that a large number of tourist from these two countries travel to Bangladesh annually. Therefore, the government should establish an On Arrival Visa facility for India and Nepal. To increase tourist arrivals from neighboring and surrounding countries, the government of Bangladesh should begin working toward visa-free travel. Tourism is one of the focal points of BIMSTEC (Bangladesh, Bhutan, India, Nepal, Sri Lanka, Myanmar, and Thailand) interregional activities. Therefore, it is easier for Bangladesh to work toward visa-free travel among these nations for tourism development. Other BIM (Bangladesh, India, Bhutan, Myanmar) countries, with the exception of Bhutan, are willing to permit visa-free travel among themselves.

³⁵ The Daily Star, Jan 11, 2022.

2. AM-2: Organisation of public-private-public collaboration and integration in tourism development and management, including international cooperation

Rationale: In order for Bangladesh to become a tourism hub, the administrative procedures of the country must be reviewed and modified to be more conducive to tourism development. A simplified procedure will facilitate international travel for tourists. In addition, it will be easier for BIMSTEC tourists to travel to the neighbouring country, which will further promote tourism in the region. The eligibility and requirements for long-stay and multiple-entry visas should be reconsidered so as to facilitate the influx of more tourists without jeopardizing national security.

3. AM-3: Relaxing Regulations at Border

Rationale: Bangladesh and India share a border that is 4,096 kilometers long and has 21 land ports. To attract tourists from neighbouring countries, Bangladesh can open its land border and liberalized VISA regime based on bilateral discussion. For instance, 85 percent of Tripura's border is covered by Bangladesh's border. Therefore, the government should consider revising regulations for more conducive border crossings.

4.4.3. Legal and regulatory framework for sustainable tourism

The Legal and Regulatory apparatus for Tourism in Bangladesh needs to be overhauled in order to make substantial impact on tourism performance and improve overall service delivery and transparency. However, since these are major structural changes, it is recommended that large scale consultations with a wide range of stakeholders, including, Government and Private players should be initiated first. Such consultations must be followed by vetting of the proposals by Legal experts before these changes can be successfully implemented. Major recommendation which need to be considered in terms of an improved Legal and Regulatory Framework includes the following

Strategies:

1. IR-01: Promulgation of a National Tourism Act as an umbrella legislation for the tourism sector

Rationale: There is a growing need for a legislation which accommodates all major aspects of tourism. A very evident problem with the tourism sector in Bangladesh is that matters pertaining to it are handled by a multitude of Ministries/Department and agencies with little coordination between them. Similarly, there is a complex mesh of legislations which summarily deal with different aspects of tourism without any synergy between them. Therefore, the need is to provide simplicity and clarity in the legislative regime related to the tourism sector. The following are some proposals in this regard:

- This should be an Umbrella Act on Tourism (The National Tourism Act)- which will bring the operations of all tourism related activities including eco-tourism under its ambit
- It will propose a coordination mechanism between different ministries involved with tourism
- Specific guidelines/bylaws to be drafted for different tourism themes/products should be drafted under the provisions of this act.
- This brand-new Tourism Act, shall make the sustainable development of tourism for community benefit, a statutory requirement for all government departments, with a duty to consult on how tourism can advance the SDGs.
- Shall define the composition, roles and responsibilities of newly constituted/reformed NTC, BTB and the Ministry of Tourism.
- Shall have provisions describing the composition, roles and responsibilities of the newly proposed Divisional Level Offices of the BTB/Destination Management Organizations (DMO).

4.4.4. Human Resource Development (Human capital and education)

In view of the fact that tourism is a labor-intensive industry that has the capacity to contribute to the economy of a country, the importance of good quality human capital is essential to the success of tourism initiatives

fructifying and gaining traction on the ground. Bangladesh has the potential to explore its human capital in tourism and hospitality sector such as availability of 57.9% (Census 2011) of working population, existing training institutes/ universities provide training and courses related to tourism and hospitality sector, advancements growing in tourism sector will generate many employment opportunities etc. Further, several consultations were conducted with stakeholders such as Bangladesh Tourism Board, TEAB, Tour Operator Associations, Hotelier & other Tourism Associations, Bangladesh Institute of Development Studies (BIDS), Department of Tourism & Hospitality Management (Dhaka University), Tourism & Hospitality Industry Skills Council (THISC), Bangladesh Rural Advancement Committee (BRAC) etc. The consultations and research are based on two aspects, first, how can we increase and improve Human Resource in Tourism industry and second, how can we strengthen the existing institutions to manage/monitor the tourism activities in the country. Most of the issues raised by stakeholders were similar to what we discovered in secondary research and validated our findings. Pan country field surveys validated the findings further. The major concerns which came into light regarding the uplifting of the Tourism and hospitality sector in Bangladesh are described in the section below.

Issues and Potential

1. Lack in overall 'Quality of Services' in tourism industry as per international standards and high dependency on expat managers

This is due to unavailability of quality professionals working in hotels/ restaurants/tour & travel operators etc. due to poor education standards because of outdated curriculum, lack of qualified teachers; Gap between knowledge being provided in educational and training institutions and the practical skills required in the tourism and hospitality industry; Untrained staff and service providers, lacking basic etiquettes and communication skills especially in small and mid-range hotels.

2. Unavailability of skilled and specialized trained staff/workers in Tourism and Hospitality industry especially beyond Dhaka

This is due to limited coverage or availability of training programs related to tourism across various districts of Bangladesh; Lack of market linkages of educational and training institutes at national and international level; Hotel Catering and Tourism industry is perceived as unattractive due to the odd working hours, low salary/wages, seasonal employment and low job status, hence less people/youths are opting this sector; Women hesitate to work in this sector mainly due to concerns over a secure work environment; 10 million population migrate to Gulf countries of which large and increasing share is of unskilled labourers; Local people are unaware about the benefits of tourism and its related sectors.

Strategies

1. HRD – 1: Improve education standards in Tourism and hospitality institutes/universities that tailors the industry needs with special focus on practical training and as per market requirements

Rationale: Rigorous audit of business registration process is required for identification of key bottlenecks including but not limited to the complexity of documentation and paperwork requirements. Possibility of deemed approvals and auto-renewal for low impact permits must be explored along with a shift to end-to-end digitization of application process. Pre-approved projects should be included in bouquet of investment opportunities to aid development.

4. HRD – 2: Improve the quality of workers already working in the service industry through basic trainings that includes communication, language, hospitality, computer, etc

Rationale: There are many employment opportunities at all levels in Tourism and hospitality industry in Bangladesh. For instance, currently there are 38247 nos. of managerial positions in accommodation sector while 234 nos. in tour & travel agencies. Due to lack of quality professionals, basic etiquettes and communication skills especially in small and mid-range hotels etc., the positions are currently being fulfilled by expatriates.

5. HRD – 3: Build human capital for growing tourism industry by generating awareness; skill development of host communities with special focus on youth and women; encourage local employment and; Improve the job attractiveness of hospitality industry

Rationale: There is unavailability of sufficient skilled and specialized trained staff/ workers in Tourism & Hospitality industry especially beyond Dhaka. As per the “National Tourism Human Capital Development Strategy for Bangladesh: 2021-2030” (a study conducted by TEAB and BTB), it has been predicted that by the end of 2030 there will be a gap between demand (i.e. 38 lacs) & supply (i.e. 2.8 lacs). Thus, there is a need to increase the quantum of employment and also to upskill the existing workforce. This gap is due to multiple reasons such as Limited availability/ accessibility to training programs related to tourism across Bangladesh; Lack of market linkages of educational and training institutes at national and international level; Hotel Catering & Tourism industry is perceived as unattractive due to odd working hours, low salary/ wages, seasonal employment & low job status etc.

6. HRD – 4: Strengthen the capacity and capability of staff in MoCAT (Ministry of Civil Aviation and Tourism), BTB (Bangladesh Tourism Board), DTC (District Tourism Cell) etc.

Rationale: There is a lack of sufficient manpower and specialized experts in government departments to develop the Tourism industry in the country. This is due to shortage of capacity building programs like ICT skills, management skills, marketing skills, communication skills etc. which restricts the ability of government institutions to undertake tourism projects without external assistance.

4.4.5 Data requirements, statistics and KPIs for planning

Economic pillar:

Cementing Tourism as a major national industry delivering substantial growth to the Economy.



10 years KPI's:

International Tourist Receipts – To increase minimum by 10% p.a.

Number of International Tourist- To increase 2.6 million international visitors by 2035.

Average expenditure per trip per day –By 2030, 183\$ (15,000TK) for international visitors

Average Length of all International Visitation- By 2030, Increase from 2 days to 6 days.

Promotions pillar:

Getting the word out to all priority markets.



10 years KPI's:

International Tourist Receipts – To increase minimum by 10% p.a.

Number of International Tourist- To increase 2.6 million international visitors by 2035.

Average expenditure per trip per day –By 2030, 183\$ (15,000TK) for international visitors

Average Length of all International Visitation- By 2030, Increase from 2 days to 6 days.

People's pillar:

Creating valuable workforce and transferring benefits.



10 years KPI's:

Annual Labour Preference Ranking¹ – Tourism at first position by 2040.

Human Development Index (HDI) – To improve the ranking annually

Number of tourism and hospitality workforce (formally trained in specialized courses)- Annual growth rate of 3%-5%

Improved education standards in Tourism and hospitality institutes – One designated Centre for Excellence² in each division (for providing specialized training in tourism & hospitality sector)

Community Involvement³ – Formal benefit sharing with local communities functional at all national parks, by 2030.

Sustainability Pillar:

Tourism becomes the driver of green economy in Bangladesh.



10 years KPI's:

SDG Index Score – To improve the ranking annually

Composite of Environment Sustainability Indices: To improve atleast 10 rank in each index

% of tourism enterprises with a recognized environmental certification: By 2030, To promote minimum 30% enterprises

Blue Flag Certifications: By 2030, To include atleast 5 potential beaches

Eco Certification/Green Star Rating/ Green Building codes/ Green Hotels – Industry best practices to be outlined and incorporated in policy mandates.

Green Destination Standards (Certification of GSTC) – By 2030, Target atleast 10 number of destinations

Sustainable Travel Index - To improve the ranking annually. 2030, Increase from 2 days to 6 days.

Experiences pillar:

Unique and world class experiences to travelers.



10 years KPI's:

Bangladesh Destination Happiness Index – To improve the ranking annually

Travel and Tourism Competitiveness Index - Achieve below 100 rank in 10 next years

Level of Confidence in Tourism Products & Services – Target atleast 10% increase annually.

Visitor Satisfaction Ranking- To improve the ranking annually

Enabling environment pillar:

Creating environment for transformation and change.



10 years KPI's:

Implementation of E-Visa regime: By 2025, Visa processing time to be reduced to less than a week, through E-Visa regime.

Dedicated Budget allocations for tourism sector: Separate allocations for specified tourism segments (product development, market, Human capital and education, Capacity & Skill development etc.)

Henley Passport Index⁴: By 2030, Bangladesh to be recognized as top passport ranked better than neighbouring countries.

FDI: Significant increase in FDI through clear policy mandate for tourism sector.

Ease of doing business ranking: To improve the ranking annually

¹ Govt of Bangladesh is recommended to study carrier preferences as part of the improvement initiatives for ease of doing business.

² Govt of Bangladesh to develop norms and capacity to convert universities/ institutes for providing specialized courses and vocational trainings for tourism and hospitality sector. Such Institutions to be designated as "Center for Excellence" for the tourism industry.

³ As part of the safeguards: Framework for benefit sharing with local communities and extensive implementation

⁴ Bangladesh's passport shares 103rd rank whereas Myanmar ranks 97th on Global Index 2022

5 Summary of strategic recommendations, prioritization, and Phasing (3,5,15 years)

5.1 Market Development

Key Strategy	Existing Situation	Priority Actions	Institution (s)	*	**
MD-01: Boost Bangladesh's appeal within South Asia, via revamped marketing and branding campaigns through leveraging the role of different stakeholders (SDG-4, 17, Vision 2041- Strategy for Technology Breakthrough, Pg 22 8th YP – Tourism facilities and support services, Pg 276 NTP- 3.1.9, Pg 7)	Bangladesh is not popular as much as its regional counterparts such as India, Nepal, Bhutan, Sri Lanka, etc. and has largely gone unnoticed with respect to the broader global tourism market.	MD-01/A: Enhance capacity of Market Development Department of BTB (with neighbouring countries like India, Nepal, Sri Lanka & private sector participation) to conduct more aggressive marketing and promotional campaigns - to ensure effective marketing deliveries are aligned with tourist consumption preference and the goal of the country	BTB		
		MD-01/B: Promote joint marketing campaigns through familiarization trips, webinars targeting travel agencies and consumer advertising campaigns such as digital campaigns, ambient outdoor campaigns and radio advertisements – targeting countries which already has an established foreign tourist arrival base in the country such as India, UK, USA and China.	BTB, BD Inbound, TOAB, ATTA		
		MD-01/C: Identify brand champions (e.g. visiting celebrities, social influencers, visiting celebrities) as third party endorsement to promote Bangladesh as a tourism destination. Plan out annual programs to invite travel writers, journalists, celebrities and sports personalities on FAM tours Bangladesh.	BTB		
		MD-01/D: Prepare a comprehensive annual events calendar, with emphasis on home-grown events, regional events and events during the low seasons. Publicizing perks (such as low discount offers) on social media will create popularity for off-season tourism	BTB, BD Inbound, TOAB, ATTA		
		MD-01/E: Establish BTB representative offices or appoint representatives in identified key generating markets (such as India, China, UK and USA) to promote Bangladesh tourism. Through BTB overseas offices, create platform for local travel trade and hospitality sector to showcase their products and activities.	BTB		
		MD-01/F: Organize joint promotional campaigns with the national airport carrier – offering promotional deals to key target markets	BTB, Biman Bangladesh		
		MD-01/G: Undertake bi-annual mass awareness campaigns to educate local communities regarding the importance of using social media to enhance brand image of a region with support from local DMCs and TOs	BTB, TEAB		
		MD-01/H: Develop connectivity with the tourism cell/activities in the trans-national government organizations like SAARC, BIMSTEC, ADB, D-8, OIC, and UNWTO (National Tourism Policy'2010).	BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Existing Situation	Priority Actions	Institution (s)	*	**
MD-02: Strengthen and establish market research capabilities to create database required demand-centric tourism development. (SDG-4, Vision 2041- Moving from factor-driven stage to innovation-based economy, Pg155 NTP- Ch 2:(xxiii) Pg 5)	Successful tourism development strategy necessitates an understanding of market trends. Lack of VSD on domestic and international tourist restricting informed decision making Without comprehensive statistics and research, it will be impossible to quantify the effects of tourism investment and its return.	MD-02/A: Establish a dedicated tourism research unit within Marketing Department of BTB to manage, monitor and analyse online feedback about Bangladesh, to better understand the visiting tourist profile	BTB		
		MD-02/B: Conduct bi-annual short, random visitor surveys in summer and winter to obtain a picture of visitor demographics, activities, expenditure patterns, etc. at various tourism hotspots, in collaboration with local authorities, to establish an exhaustive tourism database	BTB		
		MD-02/C: Utilize statistical tools such as SPSS for interpreting data regarding Marketing and Consumer Behaviour while also integrating AI/machine learning for real-time solutions	BTB		
		MD-02/D: Revamp Beautiful Bangladesh website to integrate it with booking engine or reservations system. Other components which can be added include information regarding Things to do, Guidance for travelling to Bangladesh, Itinerary options, transport options and package deals.	BTB, BD Inbound, TOAB, ATTA		
		MD-02/E: Revise Marketing Plans annually through periodic regional competitor analysis to understand market position and to identify any potential markets which can be targeted to help Bangladesh compete better.	BTB		
		MD-02/F: Work closely with the Tourist Police and accommodation units to obtain and track the numbers of both international and domestic visitors	BTB, TP, Hotelier Association		
MD-03: Increase marketing effectiveness by launching campaigns catered to the profile and interest of tourists from key origin countries. (SDG-9,17, Vision 2041- Driving the growth of ICT and innovation industry, Pg 155 NTP- Ch(xiv) Pg 4))	Increasingly tourism, particularly high value tourism, is driven by experiences. As tourism is restarting from the Covid-19 pandemic, Bangladesh has the opportunity to selectively target the right group of tourist – targeting people who spend more and stay for longer duration, moving away from current generic tourism marketing	MD-03/A: Seek partnership with marketing partners in key target countries (India, China, UK and other European countries, USA, Middle East and Australia) for optimal digital marketing – such as country-specific social media pages or YouTube videos in local language of target countries.	BTB, Tourism Boards of target countries		
		MD-03/B: Utilize electronic/print PR marketing to create greater awareness/exposure of Bangladesh as a destination. Develop and execute at least one public relations campaign per source market per year	BTB		
		MD-03/C: Focus on content marketing for search engine optimization	BTB		
		MD-03/D: Focused marketing initiatives to be developed to involve volunteer foreign students/scientists in biodiversity conservation and climate adaptation projects, which can be marketed as an USP for Bangladesh	BTB, DU, KU		
		MD-03/E: Promote cultural events such as Dhaka Lit Fest, Dhaka Art Summit, Dhaka International Film Festival, etc. where tourists could participate and attract greater publicity for Bangladesh through such events	BTB, Ministry of Culture		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Existing Situation	Priority Actions	Institution (s)	*	**
	campaigns targeting the mass audience.	MD-03/F: Create a Bangladesh River Cruise brand and promote through digital and traditional media networks. This can also be marketed in key regional trade shows/tourism fairs	BTB, BD Inbound, TOAB, ATTA		
		MD-03/G: Market Bangladesh as a MICE destination hosting more international garment exhibitions and trade shows similar to Bangladesh Denim Expo, BIGTEX, INTEX South Asia, etc. – reinforce market intelligence efforts and support innovation for MICE sector	BTB, Industry experts		
		MD-03/H: Brand Bangladesh as a destination for eco-adventure by leveraging on its rugged tropical rainforest image. Design attractive mobile applications (such as Mobile Trekking applications for CHT areas) and focus on a targeted marketing campaign towards youth associations, and schools and universities.	BTB, MoCHT		
		MD-03/I: Develop personalised stories for historical monuments through audio-visual tools or through utilizing human storytelling methods to bring the story alive, thereby better engaging the average tourist	BTB, Dept of Culture		
		MD-03/J: Encourage films and documentaries to be produced in Bangladesh which will indirectly promote tourism. Appoint PR specialist to promote destination to movie studios and offering support in location scouting, media coverage, tax incentives, etc.	BTB, movie studios		
		MD-03/K: Use diaspora on promotional campaigns to generate tourism. Explore potential promotional tie-up opportunities with international Bangla chefs in countries like UK and USA showcasing authentic Bangla food.	BTB, Diaspora organizations		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.2 Product Development

Key Strategy	Key Findings	Priority Actions	Institution	*	**
ECO TOURISM					
PD-01: Position Bangladesh as a well-known ecotourism destination by developing high-quality products and implementing environmentally friendly practices. (SDG-4, Vision 2041-Develop a Sound Environment and Climate Change Financing Strategy, Pg 207 8th YP – Promoting Eco-Tourism, Pg 775 NTP- Ch 2(v) Pg 4))	Even in well-established ecotourism destinations like the Sundarbans, it has been recognized that a greater emphasis should be placed on the quality of tourist accommodations, food, hygiene, and safety and security facilities, etc. Bholaganj, Ratargul Swamp forest, and other popular eco-tourist destinations lack even the most basic amenities. It has been observed that environmentally friendly and sustainable practices should be prioritized when promoting and developing hiking trails, picnic areas, and bicycle trails, etc. Community involvement should also be bolstered in remote areas of the Sundarbans and other eco-tourism destinations.	PD-01/A: Develop and promote regional admissions policies that reward visitors and operators ³⁶ who travel using renewable energy sources. For instance, incorporate cycling into all new tourism initiatives, making sustainable transportation a critical component of a sustainable tourism strategy.	Shilpokala Academy, BTB		
		PD-01/B: Educate new and existing tourism providers about the benefits of green tourism in order to encourage environmental responsibility and sound business management.	BTB		
		PD-01/C: Developing standard operating procedures (SOPs) for tourism operators in accordance with responsible travel / eco-friendly practices.	BTB, ToAB		
		PD-01/D: Strengthening and updating co-management committees (CMCs) and co-management plans for protected areas management.	BTB, MoEFCC		
		PD-01/E: Promoting the acceptance of appropriate accreditation programs for regulating tourism operators' access to natural areas, particularly national parks.	BTB, ToAB		
		PD-01/F: Launch a continuous sustainable tourism development and investment program aimed at expanding and maintaining the range of tourism products and experiences available to visitors, as well as strengthening the capacity of local tourism service suppliers.	BTB, BPC, BIDA		

³⁶ Recognize and incentivize high quality certified ecotourism operators.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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PD-02: Conservation and preservation of the area's natural resources and biodiversity while providing high quality and responsive visitor services. <i>(SDG-4, Vision 2041-Develop a Sound Environment and Climate Change Financing Strategy, Pg 207 BDP- Pg 20, (GED) 8th 5YP – Challenges of forest sub-sector, Pg 506 NTP- Ch 2(x) Pg 5)</i>	Bangladesh's tourism resources are largely based on its natural resources and biodiversity. The combination of higher elevation hills and river valleys creates a diverse and unique biome that supports a variety of high-quality nature experience. Based on primary survey, the natural environment has been tragically neglected, and mass production and river pollution pose serious threats in certain areas. Given its location, the district's future tourism success will be determined by the environmental quality and sensitivity with which it develops tourism facilities. Since,	PD-02/A: Develop a National Ecotourism Policy/Plan to improve the planning, sustainable management, conservation, financing, promotion and operation of ecotourism sites (wetlands, Tiger conservation, Elephant sanctuary, Vulture safe zone, and rare biological diversity etc.).	BTB		
		PD-02/B: Developing a sustainability initiative, through sound environmental management, community engagement, or integration with local supply chains, which will likely improve the consumer offering and loyalty.	BTB, DoE		
		PD-02/C: Assist NGO's and relevant government ministries in increasing environmental awareness among tourism businesses and communities and in encouraging environmentally sustainable practices	BTB, NGO		
		PD-02/D: Strengthening of Sundarbans Travel Policy and a pilot project can be implemented which can be replicated at other eco-sensitive areas.	BTB, DoE		
		PD-02/E: Create a system for issuing online international entry permits to streamline the process and reduce security clearance time. Agree on a system and procedure for issuing conservancy entry tickets that also serve as travel permits.	DIP		
		PD-02/F: Ensure compliance with applicable laws and standards for wildlife interactions through annual tourism awards or certifications - such as Best Green Destination, Best Ecolodge, Best Community-Owned Green Enterprise, etc	BSTI, MoEFCC		
PD-03: Facilitate increased private sector and	The majority of tourism-related entrepreneurs in the region operate on a small scale. Seasonality has an	PD-02/G: Design National level Green criteria/standards to monitor the level of eco-friendliness in destinations – utilizing best practices such as GSTC certification for destinations, Green Destinations Standard, Sustainable Tourism Eco-Certification Program, etc.	BSTI, MoEFCC		
		PD-03/A: Establish Nature Education Centres at selected ecotourism sites thus promoting safe tourism in areas such as Sunderbans, Lawachhara NP, Tanguar Haor, etc. through partnerships with national and international universities, NGOs, exposure visits etc.	NHTTI, NGO, BTB		

Legend:

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community involvement in ecotourism development (SDG-4,11, Vision 2041-Ensure Sustainable Management of Forestry Resources, Pg 205 NTP- Ch 2(ix) Pg4)	impact on their businesses' sustainability, service quality is generally low, business knowledge is limited, and the majority of businesses face skill shortages. Numerous businesses lack the financial resources necessary to expand. While the government can undoubtedly contribute significantly to tourism development, private sector ownership or partnerships have proven to be the most effective and sustainable model for increasing the variety and quality of tourism accommodation, transportation, and other services. Private investment can take place in collaboration with the government or with local communities.	PD-03/B: Promoting Economic incentives and disincentives to encourage consumers and businesses to reduce waste generation and responsibly dispose of waste, thereby increasing demand for greening the waste sector. Taxes and fees; recycling credits; and other forms of subsidization can be promoted	BTB, DoE		
		PD-03/C: Investigate investment support options based on international best practice case studies. Formulate and approve a public-private-community tourism investment support program and package.	BIDA, BTB		
		PD-03/D: Establish an enterprise training and mentoring program, and where possible enlist the assistance of more established and successful local and national business owners as mentors.	NHTTI		
		PD-03/E: Commercialization of public-owned land for private sector investment and development of strong public-private tourism partnerships. It could include government land concessions, assistance with plan approval, tax breaks, and training assistance, etc.	MoL, PPP Authority, DoE		
		PD-03/F: Development of ecotourism training materials (for rangers, foresters, and nature guides) for the purpose of gaining knowledge of ethnic culture and nature, as well as practical skills in product interpretation, business planning, marketing, and management.	NHTTI, Shilpakala Academy		
RIVERINE AND CRUISE TOURISM³⁷					
PD-04: Ensure sustainable and integrated management of river systems by	Bangladesh has an abundance of waterways that are connected to form a unique transportation network. The majority of people live along rivers,	PD-04/A: Strengthening the Tanguar Haor Management Plan Framework and Guidelines, and implementing a pilot project that can be replicated in other haors throughout the region.	DoE, BTB, TP, MoL		
		PD-04/B: Integrating ICT in the tourism industry for tourism management and quality experience through developing ICT enabled TIC's	BTB, ICT D(MoST)		

³⁷ Riverine tourism includes, haors, baors, jheel and back water tourism. Cruise tourism includes river cruises and ocean cruises

Legend:

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enhancing the visitor experience <i>(SDG-4,9,16,17, Vision 2041: Strategy for Developing Inland Water Transport, Pg 176 BDP: (Goal 3, Pg-6 NTP- 3.2.4 Pg 7)</i>	<i>which results in a variety of attractions and cultural heritage on both sides of the river. However, sightseeing along the river is popular only in a few areas, such as Barishal, and there are few options for longer river tours that cover additional territory. Additionally, the quality of the boats and infrastructure is not up to safety standards and is inconvenient for tourists. Existing boat services and supporting infrastructure are dismal and should be improved to service the increasing demands of river tourism. Also river pollution pose serious threats, such as Tahirpur Boat Station, where piles of plastic trash were found on the river's bank.</i>	PD-04/C: Improving accessibility and creating infrastructure for barrier free tourism through piloting infrastructure upgradation, incorporating tailored information on tourism website, promotion of mobility maps, travel guides for differently abled etc.	RHD, BTB, LGED		
		PD-04/D: Enforcement of Environment and nature conservation acts, rules and procedures.	BELA, DoE		
		PD-04/E: Enforcement of laws to stop illegal sand mining and removal of encroachments from the rivers. – River management, excavation and smart dredging preceded by appropriate feasibility study. ³⁸	MoEFCC, BELA		
		PD-04/F: Monitoring and Control of Pollution ³⁹ : Control of pollution from ships, hazardous waste, and oil spills, as well as the incorporation of strategies such as the polluter pays principle. Implementation of CBD-related incentives, land-based waste dumping and management, and pollution abatement programs	DoE, BTB		
		PD-04/G: Assess where river ports/piers/jetties as well as river boats need improvement and improve them as necessary, with private sector investment	BWITA		
		PD-04/H: Establish partnership with the Bangladesh National River Protection Commission to align development, increase environmental commitments and for knowledge sharing purposes. Protection by development and improvement of embankments, barriers and water control structures for priority zones ⁴⁰ .	NRCC, DoE		
		PD-04/I: Develop strategies to showcase traditional way of life, cultural attractions and other activities – river fishing, tiger/bird watching, floating markets can be included as a unique product along these cruises.	BTB		
		PD-04/J: Design various river cruise routes, especially in the Barishal division, taking advantage of greater connectivity from Dhaka via the new Padma Bridge	BIWTA		
		PD-04/K: Channel navigation fees (from river users/tourists) will be established, and long-term leases for reclaimed land will be developed to revitalize the inland water transport ⁴¹ .	BIWTA		

³⁸ Strategy FR 2, Sub Strategy FR 2.5, BDP (Volume 1), page number -17.

³⁹ Strategy FW 2, Sub-strategy FW 2.2, BDP (Volume 1), page number -17

⁴⁰ Sub-strategy FR1.1- Bangladesh Delta Plan, Volume 1, page number – 16.

⁴¹ Bangladesh Delta Plan, Page 40.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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PD-05: Leveraging Bangladesh's extensive river network to develop cross-border river-based tourism. (SDG-17)	Possibility of expanding collaboration with India as a result of recent advancements in the opening of Protocol Routes between India and Bangladesh	PD-05/A: Enhance cross-border riverine/ocean cruise product development with India, with integrated destination management and joint marketing & promotion	BIWTA, BTB		
		PD-05/B: Develop custom clearances/security arrangements, immigration procedures for passengers and health clearances for all the foreign tourists looking to partake in cross-border tourism in a similar model to the Schengen visa	DIP, BTB, MoFA		
BEACH TOURISM					
PD-06: Protect and restore the fragile beaches to improve the quality of beach destinations in Bangladesh (SDG-4,13,15 Vision 2041: Strategy for Blue Economy, Pg 212 BDP: Strategy FR 1 (Volume-1) pg-16; BDP: Advancing the Blue Economy, pg-25.	The country is endowed with extraordinary natural beauty, as evidenced by the world's longest beach, Coz Bazar, and the unique coastal morphology created by the numerous rivers that intersect the coastline and merge with the Bengal Sea. Given the presence of such unique assets, the coastal tourism segment has enormous potential to generate socioeconomic benefits for the entire community.The beaches of Sabrang, Shahpuri Dip, and Nizum Dip are of particular interest because they have the potential to develop into	PD-06/A: Conduct carrying capacity studies and implement visitor management strategies at marine destinations islands facing high tourist visitations such as Cox's Bazar.	BTB		
		PD-06/B: Ensure systems to manage waste (waste water, solid waste, agricultural and industrial pollution), as well as a plastic-free regime ⁴² .	LGI, BTB		
		PD-06/C: Promoting selected beaches as a global benchmark for responsible beach tourism and investigating the feasibility of Blue Flag certification.	BTB, DoE		
		PD-06/D: Promoting sustainable Scuba/Snorkelling for tourist destinations like Saint Martin in Coz Bazar. To reduce the impact of tourism on coral reefs, Green Fins certification will be promoted to help dive operators become more eco-friendly.	DoS, BTB, LIG		
		PD-06/E: Regulate diving and snorkelling activities through stringent enforcement and use of visitor management techniques such as diving zonation and education	DoS, BTB, LIG		
		PD-06/F: Embark on comprehensive reef restoration programmes at Saint Martin's Island that combine initiatives to restore damaged coral reefs and the construction of artificial reefs.	LIG, DoE		

⁴² BDP (GED), page number 25

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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	a global beach tourism destination. There is an immediate need for regulatory reforms aimed at reining in the growth of tourism on islands like Saint Martin.	PD-06/G: Prepare and implement a climate change mitigation and adaption plan for coastal tourism that incorporates spatial planning for marine area and flood prone areas.	MoFCC, LIG		
PD-07: Revitalizing the coastal belt of Bangladesh as a high-quality tourism destination by monitoring and controlling development (SDG-4,9,16 BDP- P.1, Pg19)	At the moment, unchecked mass tourism has degraded the natural beauty of the majority of the beaches. Furthermore, the construction of new hotels and recreational facilities in Coz Bazar and Saint Martin results in an increase in tourist traffic. These activities are wreaking havoc on the local ecosystem, eroding it and, in the long run, destroying it.	PD-07/A: Empower locally-based NGOs to spearhead voluntary and CSR programmes related to conservation, such as beach clean-up, coral restoration and reforestation.	MoWCA, NGOs, LGI		
		PD-07/B: A rewards and incentives should be encouraged for outstanding sustainability practices. Developing ranking and scoring system for tourism destinations, particularly beach destinations, based on environmental quality (green awards) which can foster collaboration within communities and inspire competition among diverse communities to preserve the environment.	BTB		
		PD-07/C: Incentives to encourage private investment in environmentally friendly tourism, such as green hotels, should be established.	BIDA, PPPA		
		PD-07/D: Provide Development Control Regulations for controlling development around beach sites	DoE, LGI		
ARCHAEOLOGICAL & HISTORICAL TOURISM					
PD-08: Strengthening the preservation of Bangladesh's heritage assets	Each region in Bangladesh has a distinct heritage and history, such as Paharpur, which is known for its Buddhist heritage, Bagerhat, which is known for its mosques, and Dhaka, for its	PD-08/A: Develop a pilot project for retrofitting and adaptive re-use of heritage buildings (such as Puthia Rajbari) to ensure protection of the cultural identity of Bangladesh and provide opportunities for innovative collaborations and revenue generation.	Shipakala Academy, NSDA, BTB		
		PD-08/B: By incorporating standards and regulations into the architecture and design of buildings, zoning laws can be used to incorporate the region's unique cultures and heritage.	DoA, Shipakala Academy, , MoP		

Legend:

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(Vision 2041-Beyond Human Development: Values, Culture and Heritage, Pg 61 BDP- Sustainable Land Use and spatial planning, Pg 23; 8th YP – Strategies under the 8th Five Year Plan, Pg 691 NTP-3.2.3, Pg 7)	War Liberation Museum. However, not all aspects of ethnic cultures are fully integrated into tourism products, resulting in inconsistent offerings across regions, such as similarly styled buildings, restaurants, hotels, city centres, and even ethnic products.	PD-08/C: Piloting best practices and promoting the preservation of ethnic culture and heritage. Organizing an annual competition ("Authentic Awards") between communities to promote local authenticity preservation and providing incentives.	Shipakala Academy,		
		PD-08/D: Awareness campaigns to encourage preservation of local identities. Foster collaboration between local authorities and community leaders. Leveraging media to promote the identity and uniqueness of each region	Shipakala Academy, , BTB, LGI		
		PD-08/E: Develop tourist-friendly infrastructure at sites such as proper signage, interactive boards, etc.	DoA, RHD, LGI		
PD-09: Safeguard the cultural heritage ecosystem – both tangible and intangible (SDG-4, Vision 2041-Beyond Human Development: Values, Culture and Heritage, Pg 61 NTP- Ch 2(xix) Pg 5)	As per the site visits, the tour guide capacity is limited, particularly in rural areas and under-explored attractions. Locals know the fascinating story and history of the attraction, but knowledge transfer is limited. Additionally, the ethnic people lack the language proficiency necessary to convey the story to tourists. At the moment, there are few affordable and accessible avenues for ethnic people to acquire business and commercial knowledge and skills. This limits the locals' ability to generate economic value from their enormous cultural assets.	PD-09/A: Leverage diaspora investment for preservation of arts, culture and local heritage products (especially intangible heritage assets like Sitalpati & Jamdani weaving, Baul singing, Mangal Shobhajatra on Pahela Baishak etc.	BIDA, BTB		
		PD-09/B: Develop business skills among local communities in order to commercialize tourism offerings that capitalize on local and cultural heritage to generate wealth, including business fundamentals training curricula developed in collaboration with schools and local businesses.	NHTTI, NSDA, BTB		
		PD-09/C: The government should encourage more community-led development, such as pottery in Maheshpur and silk in the Rajshahi region. The government should assist local communities in developing a go-to-market strategy for high-quality souvenir products that leverage the region's culture and heritage			
		PD-09/D: Organize capacity building programmes for local communities in and around important heritage sites, to provide them with the necessary skills to show their culture to tourists			

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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PILGRIMAGE & SPIRITUAL TOURISM						
PD-10: Creating world-class religious tourist destinations with international recognition <i>(SDG-9,11 Vision 2041-Beyond Human Development: Values, Culture and Heritage, Pg 62 NTP- 3.2.5. Pg 8)</i>	Due to the abundance of religious attractions such as Hazrat Shah Jalal Mazar Sharif, the Dhakeshwari Temple, and the Buddhist Vihara in Paharpur, Bangladesh is considered a religious tourism destination. Bangladesh is the nineteenth most popular tourist destination for Muslims in the world [GMTI index]. The Sompur Mahavihara Paharpur monastery (UNESCO WHS) is the most notable Buddhist structure. The Golden Temple, perched atop a hill in Bandarban, is one of the Bangladesh's most enticing Buddhist temple To modernize the existing tourism infrastructure and facilitate the movement of pilgrims, funding for the development of religious tourism attractions and a re-evaluation of government policies are necessary.	PD-10/A: Retrofitting and renovation of existing religious monuments/structures through use of smart infrastructure/amenities	DoA			
		PD-10/B: Integrate existing infrastructure systems in religious destinations with smart/nature-based engineering solutions	RHD, LGI, ICTD			
		PD-10/C: Establish Halal ⁴³ rating and certification services utilizing existing standards such as Crescent Rating and TripFez' Salam Standard	BSTI, BTB, DHC (department of halal certification)			
		PD-10/D: Promote Visa facilitation/waiver programmes for OIC member countries such as a Common Visa Scheme	MoFA			
PD-11: Emphasizing Bangladesh as a religious travel destination that provides spiritual experience. <i>(Vision 2041-Beyond Human Development: Values, Culture and Heritage, Pg 62 NTP- 3.2.5. Pg 8)</i>		PD-11/A: Develop a Tran-boundary Religious circuit	BTB, MoC			
		PD-11/B: Facilitate and promote private investment in hospitality and tourism facilities	BIDA, BTB			
		PD-11/C: Develop new experiences near Buddhist destinations focusing on health and wellness through retreat centres offering yoga, meditation and digital detox	BTB			
		PD-11/D: Organise annual event commemorating Buddha Jayanti, inviting religious leaders from Southeast Asian countries.	BFACF			

⁴³ 20% of the tourist attractions of Bangladesh are halal attractions.

(Bhuiyan and Darda, 2018). [Include as motivation for travelers] Bhuiyan, A. H. and Darda, A. (2018). Prospects and Potentials of Halal Tourism Development in Bangladesh. *Journal of Tourismology*, 4(2): 93–106.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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MICE TOURISM						
PD-12: Developing a robust and vibrant ecosystem for MICE Business <i>(SDG-11, Vision 2041- Strengthening of the ICT ecosystem is stimulating vibrancy in the industry, Pg 150 NTP- 3.2.11 Pg 9)</i>	<i>Bangladesh is lagging behind other South Asian countries (such as China, Japan, S. Korea, etc) in terms of being recognized as a MICE destination, and is one of the lowest ranked countries in South Asia in ICCA MICE rankings</i>	PD-12/A: Improve civic infrastructure and services, provide last mile connectivity and facilitate development of core MICE infrastructure through financial incentives.	RHD, BPC, LGI			
		PD-12/B: Increase length of stay for MICE tourists by integrating local products, services, and activities into MICE package in the region – such as visiting iconic monuments in Dhaka such as Lalbagh Fort and Ahsan Manzil, luxury shopping in Gulshan or exploring unique food options in Old Dhaka area	BTP, BPC			
		PD-12/C: Develop at least one good international level convention centre (apart from Hotels) at each identified MICE destination	BPC, BTB, PPP, PWD			
		PD-12/D: Conduct annual ranking of destinations to foster competitiveness towards developing MICE industry.	BTB			
		PD-12/E: Develop a Conventions Bureau within BTB to work at destination level, collaborating with Industry Associations to ensure that any gap in the infrastructure and services are worked upon and empanelling service providers for different services	BTB			
PD-12: Improving ease of doing business to position Bangladesh as a leading business destination <i>(Vision 2041-Ease of Doing Business, Pg 99 NTP- 6.5.5 Pg 16)</i>	<i>Ranked at 168th position out of 190 countries in 'Ease of Doing Business' rankings 2019, ahead of only Afghanistan amongst other south Asian economies.</i>	PD-13/A: Develop one-stop services for companies looking to host events, and make it easier for MICE visitors and potential investors to enter the country (e-visa or visa-free)	FBCCI			
		PD-13/B: Amend existing regulations to be more conducive to logistic and movement of goods for MICE purposes				

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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ETHNO TOURISM⁴⁴& RURAL TOURISM⁴⁵					
PD-13: Improve product and service quality through tourism attractions and experiences (Vision 2041- Digitization and service transformation, Pg 148 NTP-Ch 2(v), Pg 4)	Currently many visitors are day-trippers from Dhaka and surrounding areas such as Chittagong and Cox's Bazar. One of the main reasons for this trend is the limited range and quality of tourism facilities and a limited awareness of existing tourism experiences, accommodation, and other tourism facilities on offer in the area. A major effort should be made to improve and expand the range of tourism products and services on offer and to communicate information regarding the existing range of products.	PD-14/A: Development of a calendar for year-round activities such as festivals, dance forms, and sports. Facilitating local community festivals to highlight the region's unique assets, attract tourists, and foster community involvement and pride. For instance, Ras Festival, Pohela Baishakh, etc.	BFACF		
		PD-14/B: Development of a policy for homestay registration and listing on the BTB website. All homestays shall be required to obtain professional certification and a quality-based rating every three years	BTB		
		PD-14/C: In order to promote tangible and intangible cultural products, "Artist villages" are identified and developed around themes such as Buddhist Heritage, Alpona, etc.	BTB		
		PD-14/D: Identify suitable ethnic products for the tourism market, such as Shitapati and Terracotta pottery, and engage local communities (particularly women) in discussing and agreeing on potential value-adding opportunities for such products, as well as improving their quality, packaging, and branding.	BTB, BPC		
PD-15: Develop local tourism skill	A realistic and well-planned strategy for training and skill development is required, with an equal emphasis on	PD-15/A: Providing skill development training and professional certification programs for adventure sports, sustainability, communication, hospitality, first aid, drivers, tourist guides, and cooks in host communities. It shall be widely distributed to tourists via appropriate media.	NSDA, NHTTI, BTB		

⁴⁴ Ethno-tourism is regularly interchanged with other descriptors such as "ethnic tourism", "cultural-tourism", "community-based tourism", and "anthropological tourism".

⁴⁵ The forms of tourism that showcases the rural life, art, culture, and heritage at rural locations, thereby benefiting the local community economically and socially as well as enabling interaction between the tourists and the locals for a more enriching tourism experience is termed as rural tourism. It comprises of Agro/Farm/ Forest/Gastronomy Tourism.

In the respective section the strategies for Ethno Tourism and Rural Tourism has merged to avoid confusion and overlap.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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and human resource <i>(SDG-4, Vision 2041-Emphasis on rural training, Pg 60 NTP-Ch 2 (xxii) Pg5)</i>	<i>skill and attitude development. These should be addressed directly to lodging providers, tour guides, and restaurant staff who cater to tourists. Priority should be given to women's participation in areas such as home-based accommodation, ethnic cuisines, crafts, and exposure to ethnic family culture.</i>	PD-15/B: Conducting Entrepreneur Development Programme for aspiring entrepreneurs especially women.	MoWCA, NSDA		
		PD-15/C: Promoting sustainable tourism by blending it in school and other institutional curriculum.	NCTB, UGC		
		PD-15/D: Developing a service training programme for local enterprises and staff, including a series of basic service training workshops, possibly in conjunction with local training colleges.	NHTTI, NSDA		
		PD-15/E: Empower sub-district/upazilla level functional committees and local community groups by building their capacities to manage businesses and services linking farm and non-farm based products with tourism supply chains and ensuring their participation in the decision making process.	LGI, NSDA		
		PD-15/F: Establish an enterprise training and mentoring programme, and where possible, involve more successful and established local and national business owners as mentors.	NSDA, BTB		
		PD-15/G: Provide training to improve product quality and packaging, financial start-up assistance, and assistance to local entrepreneurs in establishing supply chains in the country.	NSDA, NHTTI, BTB		
PD-16: To safeguard tourist destinations through sustainable interventions <i>(Vision 2041-Implementing the Delta Plan to Build Resilience and Reduce Vulnerability to Climate Change, Pg 203)</i>	<i>Based on primary survey and stakeholder consultations it has been observed that, there is a need for formulation of eco development guidelines, registration mechanism and monitoring mechanism and institutional mechanisms such as committees comprised of elected members representing various services to be established and strengthened. The committees should monitor</i>	PD-16/A: Strengthening and development of tourism management guidelines for sustainable tourism through formulation of thematic tourism codes of conduct for tourists and its dissemination through proper channel	BTB		
		PD-16/B: Assure complete registration/renewal of all service providers and control the number of operators in one location through a registration mechanism and the establishment of a monitoring mechanism.	BTB, ToAB		
		PD-16/C: Provisioning Carrying Capacity based tourism destination development	BTB		
		PD-16/D: At the sub-district/upazilla level, establish and elect functional member committees representing various services, such as guide committees, boat management committees, waste management committees, and yarn bank committees. Develop operational guidelines for the committees that are consistent with responsible tourism practices.	BTB, LGI		

Legend:

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BDP-Strategy FR 3, Pg17)	operating standards and ensure that environmental and cultural heritage are managed through inclusive, equitable, and responsible tourism development processes.	PD-16/E: Preparation of a special area plan for tourist areas in order to control haphazard growth due to tourism and to conserve hill architecture in CHT areas, and implementation of the plan.	LGI, BTB		
PD-17: Development of Destination control mechanism and encouraging green practices (SDG-16, Vision 2041-Reduce Air and Water Pollution, Pg 204; Strengthen Environmental Coordination and Environmental Institutions, Pg 206 BDP-Strategy FW 2, Pg 19)	The key to developing a 'sustainable' area is for all stakeholders to agree on a tourism management model. This may include identifying tourism development areas within and around paras, conservation areas with no development or limited development, trekking routes and circuits, etc. There should be clear guidelines regarding environmental impacts, building restrictions and sizes, materials and designs, and water, energy, and waste management practices, etc. Communities should be encouraged to preserve their unique cultural traditions (art, handicraft, music and dance, cooking, and so on) and architectural styles as tourism assets, as Munlai	PD-17/A: Creation of an online permit system for pristine areas in order to facilitate the growth of regulated tourism.	BTB, LGI		
		PD-17/B: Encourage guided tours to keep a check on visitor activities	TGAB, BTB		
		PD-17/C: Encouraging Destination planning and management- Decongestion planning for saturated destinations (such as St Martin's Island) through diversification to nearby new destinations, traffic regulations and management during peak seasons, green tax on entry points for tourists, green tax on development of new tourism units etc.	BIDS, MoP, LGI, BTB		
		PD-17/D: Encouraging green practices at all tourist destinations by offering incentives and recognition to visitors/operators/locals, etc. Promoting bicycles, electric buses wherever feasible. Converting CHT's popular and far-flung tourist destinations to zero-waste destinations in order to mitigate environmental stress.	Ministry of CHT, BTB, NGO		
		PD-17/E: Facilitation of the energy conservation building codes (ECBC) in tourism units throughout the country.	HBRI		
		PD-17/F: Making environmental audits mandatory for renewal of tourism registration for water conservation, energy conservation and waste minimization and segregation.	DoE, BTB, LGI		
		PD-17/G: Conducting "Clean Drives" on important dates like World Tourism Day, World Environment Day in collaboration with NGO's and through community participation.	LGI, NGO, BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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	Para, one of Bandarban's villages, has done successfully.	PD-17/H: Natural Heritage sites such as Sajek Valley, Boga Lake, Ruma, Vella Khum etc. should be open for access to a limited number of tourists having low impact and high income (Bhutan Example) with environmental standards being strictly followed.	BTB, TP		
PD-18: Developing agro-tourism as an important component of authentic Bangladeshi experience (SDG-4, BDP- Agriculture, Food Security, Nutrition and Livelihood, Pg 23 NTP- 3.2.9, Pg 8)	There are numerous opportunities for visitors to immerse themselves in Bangladesh's agricultural offerings, ranging from farm stands and farmers' markets to community-engaged experiences such as mango picking, pumpkin patches, and strawberry farms. Numerous agritourist assets are available between Rajshahi and Chattogram, with room for further growth in this niche. Collaboration with interested farmers should be promoted to enhance existing experiences, develop new ones.	PD-18/A: Promote regional tourism products and improving product quality, packaging, and branding, among other things - Establish “Locally sourced” labels for food produced through ingredients from local rural producers to guarantee authenticity.	BSCIC, BTB		
		PD-18/B: Promotion of Farm stays, farm tours and long table meals as experiential tourism	BTB		
		PD-18/C: Provide seed funding, appropriate training, and organizational support to producers of tourism-related products (handicrafts, foodstuffs, etc.) in order for them to produce adequate quantities and quality of such products, as well as package and present them attractively.	BSCIC, NGO		
		PD-18/D: Empower committees and local community groups by increasing their capacity to manage businesses and services that connect farm-based products to tourism supply chains and ensuring their participation in decision making.	MoWCA, BTB		
		PD-18/E: Providing concessions on government-owned land to local entrepreneurs, wherever possible, for farm-based activities, cultural activities, and adventure activities, with a preference for women entrepreneurs.	MoL, NSDA		
		PD-18/F: Encouraging tourism development in rural areas through financial incentives. Providing assistance to host communities in managing their cultural and natural resources.	MoC, BSCIC		
ADVENTURE TOURISM					
PD-19: Developing a sustainable adventure tourism	The various market segments in Bangladesh, particularly in Bandarban have varying requirements	PD-19/A: Develop safety and quality standards for adventure tourism activities (guide role, equipment, inspection and maintenance procedures, operating instructions, etc.) through ISO certification and specialised training courses	BTB, DoS, ATI, NSDA		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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market for Bangladesh (SDG-13,14,15 Vision 2041 Strategy for the Blue Economy, Pg 211) BDP: Sub-strategy FR 1.2 NTP: 3.1.7, Pg 6)	for various activities. These activities can range from simple and relaxing outdoor experiences (e.g. picnics, boat rides, short walks to waterfalls, shopping for local crafts and produce, and attending local cultural performances) to more challenging and adventurous activities (e.g. trekking, off-road drives, kayaking and riding the river rapids, mountain climbing, etc.). Bangladesh has ranked 7th position in the world for affordable adventures [Lonely Planet (2019)]. Site development plans for major attraction shall be prepared in consultation with local communities taking environmental threats also into consideration. A regulation governing adventure tourism in accordance with the current Tourism Policy should be drafted and integrated into the existing policy framework.	PD-19/B: Mandatory Formal Certification programs for management of high-risk adventure sports	DoS, ATI		
		PD-19/C: Developing trekkers app and tourist smart guide app to facilitate their safety. Replication of successful smart guide apps in key and emerging adventure tourist destinations.	BTB		
		PD-19/D: Develop ICT enabled Tourist Information Centres	BTB, BPC		
		PD-19/E: Encourage use of Radio Frequency Identification Tags (RFID) at important tourist destination such as Vella Khum, Keokardong etc.	BTB		
		PD-19/F: Construct adaptive and flood-storm-surge resilient tourism infrastructure and accommodation units ⁴⁶	PWD, LGED		
		PD-19/G: Establish Standard Operating Procedures to reduce and mitigate adverse effects of disaster on tourists.	BTB, MoDMR		
		PD-19/H: Launch a trail development program in collaboration with local communities and tour operators.	ToAB, BTB, LGI, NGO		
		PD-19/J: Identify and spatially locate all potential tourism hiking and boating routes in the area; assess each route for safety; and rate trails based on difficulty, time required to complete, and other factors via mobile app.	ATI, BTB, LGI		
		PD-19/K: Look for opportunities to host international competitions and tournaments in Bangladesh such as the annual Asian Cycling Championships.	DoS, BTB		

⁴⁶ Sub-strategy FR 1.2, BDP, page number -16.

Legend:

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5.3 Tourism Infrastructure

Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
ACCOMODATION					
TI-1.1: Support the growth of underutilised but potentially lucrative travel segments, such as long-stay tourism, by enhancing the variety and quality of accommodation facilities. (SDG-1,2,8,9 NTP- Ch 2(xxvii) Pg 5))	According to visitor preferences, international tourists avoid lengthy stays in Bangladesh due to a lack of amenities, high property prices, etc. Therefore, strategies must be developed to ensure a steady flow of tourism-related revenue, through an increase in the number of long-stay tourists. In addition, the government should support the development of accommodations aimed at foreign retirees and seasonal long-term tourists, with a particular emphasis on Sylhet, Coz Bazar, Khulna, Rajshahi, and CHT, etc. The quality and visitor readiness of commercial products (i.e.	TI-1.1/A: Development of community homestays, supporting infrastructure, and expatriate-friendly requirements can promote Bangladesh as a destination of choice for long-term stays and retirement, resulting in an increase in tourism revenue. Improve national regulations to facilitate long-term stays, subject to national security.	MoCAT, DC office, BTB		
		TI-1.1/B: Developing community homestays in some of the prioritized clusters such as Thanchi, Sundarbans, Tangaur Haor ⁴⁷ , Rangamati etc.	MoCAT, DC office, BTB, DoF, MoE		
		TI-1.1/C: Creation of national one-stop service centre, to facilitate foreigners looking to retire in Bangladesh, as well as those looking for winter getaways, which provide assistance in all related matters, such as visas and accommodation.	MoCAT, BPC, BTB		
		TI-1.1/D: Involvement of third party (Private sector) for quality assurance mechanism.	BTB, Private agency		
		TI-1.1/E: Identify tourist-oriented hospitality facilities (accommodations, restaurants) and advise them on how to improve quality while monitoring their progress. Specifically, female ownership and participation should be encouraged.	THISC		
		TI-1.1/F: Improve and enhance nature based experiences, activities, tourist accommodation, eco-glamping, camping, and other facilities	MoE, DoF		

⁴⁷ Tangaur Haor is one of South Asia's greatest natural water reservoirs. The IUCN designated it as a Ramsar site because to its diverse natural and marine features. To attract travellers from all around the world, the site changes its appearance with the seasons. During the rainy season, the Haor transforms into a sea with large waves, and cruising over the Haor is a once-in-a-lifetime experience for visitors. Wintergreen pastures for miles and miles, hundreds of canals, thousands of migratory birds, and fisherman in ditches are just fantastic for tourists.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
	accommodation, restaurants, entertainment, tours, etc.) and public attractions need to be improved to increase the competitiveness of the destination.	TI-1.1/G: Ensure that high-end green hotels or eco-hotels are certified through global certifications such as GSTC Criteria for Hotels, ECOTEL Certification, Green Globe, etc. Alternatively, National level Green criteria/standards can be developed to monitor the level of eco-friendliness in hotels – utilizing best components from above-mentioned certifications.	MoE, BTB, MoCAT		
		TI-1.1/H: Develop a centralized customer feedback system, for collection and analysis of visitor feedback.	BTB, MoCAT		
		TI-1.1/I: Utilize green technology for accommodation units such as utilizing solar power for electricity, rainwater harvesting mechanisms, environmentally-friendly sewage & solid waste system, etc.	MoE		
TI-1.2: Promote specialized skills training to support the development of multi tourism segments (SDG-4,8, Vision 2041 Strategy for Training and Skills Formation, Pg 60 8th 5YP – Tourism facilities and support services, Pg 276 NTP- 6.6, Pg 16)	The quality of workers already working in the service industry needs to be improved through basic trainings that includes language, hospitality, etc. Certified training programs for development of new skill (training in specialized handicraft or handloom work) and development of entrepreneurship/business skills (for homestay operator) as per the requirement of the district/division (specific to cluster-based themes) through the existing network of institutes in coordination with district tourism cell is needed.	TI-1.2/A: More specialist public-private academies as training centers for segment-specific skills.	NHITTI, THISC, BTB		
		TI-1.2/B: Designing training programs for specialist skills.	NHITTI, THISC, BTB		
		TI-1.2/C: Build human capital for hospitality sector through awareness, capacity building, skill development of host communities with special focus on youth and women	NHITTI, THISC, BTB		
		TI-1.2/D: Engage with the local community in providing opportunities within the hospitality sector and evaluating their potential benefit/impact. Ensure periodic guidance and training, with support of the private sector, to build their capacity.	NHITTI, THISC, BTB, DC Office		

Legend:

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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**

Key Strategy	Key Findings	Priority Actions	Institutions	*	**
TRANSPORTATION					
TI-2.1: Support the development of unpopular but promising travel segments, such as river tourism (SDG-9, Vision 2041- Strategy for Developing Inland Water-Transport, Pg 176 BDP- Renewable Energy, pg- 26; Dynamizing Inland Water Transport System, Pg 24 8th 5YP – 8 FYP Vision for the transport sector, Pg 394 NTP- 3.1.4, Pg 6)	The rivers have been the focal point of Bangladeshi culture. Bangladesh has numerous waterways that are interconnected to form a unique transportation network, particularly in the divisions. Bangladeshi people have always lived in close proximity to rivers, resulting in an abundance of attractions and cultural heritage on both sides of the river. However, only in certain areas, such as Barishal, is sightseeing along the river common, and there are few options for longer river tours that cover more areas. In addition, the quality of the boats and the infrastructure do not yet meet safety standards, nor are they the most convenient for tourists.	TI-2.1/A: Opportunity to best exhibit the riverside Bengalese way of life by designing various river tourism routes, particularly along the Padma River, the Shitalakhya River, etc.	BTB, MoCAT, DOE		
		TI-2.1/B: Boat services and supporting infrastructure should be improved to service the increasing demands of river tourism and to enhance the quality of the sector. In addition, climate-resilient considerations should be incorporated into all infrastructure development and other investment decisions. Examples include flood-resistant infrastructure for riverbanks and transportation systems, the promotion of a multimodal transit system, the promotion of renewable energy sources etc.	BTB, MoCAT, DOE		
		TI-2.1/C: The development and refurbishment of riverside attractions should be implemented. This implementation may take the form of private business alliances for riverside man-made attractions or a public-led initiative to develop cultural attractions.	BTB, MoCAT, DOE		

Legend:

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TI-2.2: Develop air transportation networks for incoming tourists, including upgrades to international airports and the addition of direct international flights to Bangladesh's major cities (SDG-9,17 Vision 2041 - Strategy for Air Transport, Pg177 8th YP – Strategy for Air Transport, Pg 405 NTP - (xxix) Pg 5)	Bangladesh still needs to improve the quantity and quality of its airport infrastructure in order to become a BIMSTEC hub. To increase intra-BIMSTEC travel and reinforce Dhaka as a stopover for long- and medium-haul flights to BIMSTEC destinations, the government should promote more flights from more cities, especially within the BIMSTEC region. In order to compete with other regional hubs, the airlines should consider enhancing the availability, variety, and quality of stopover packages.	TI-2.2/A: The government should encourage airlines to offer more flights between major cities in BIMSTEC and other regions of the world in order to increase the number of direct international flights to secondary cities. The routes should prioritise connecting BBIN nations with other major cities in Bangladesh, such as Sylhet, Chattogram, Coz Bazar, Rajshahi, and Khulna.	MoCAT, CAAB		
		TI-2.2/B: The government and stakeholders should look into improving the efficiency of international arrival at leading international airports by implementing these following actions. • First action is to execute the quick-win measures that reduce immigration queues, for instance, improve staff availability and better leverage advanced passenger processing system. • Second is to invest and promote the use of more self-service facilities such as e-check-in and automated immigration to reduce immigration queues. • Third is to invest in technologies and other measures that reduce waiting time for luggage.	MoCAT, CAAB		
		TI-2.2/C: Developing Dhaka as a regional and international hub with stopover facilities ⁴⁸	MoCAT, CAAB		
TI-2.3: Support and enhance efficiencies and conveniences in traveling to Bangladesh via land and water transport (SDG-7,9,13,14, Vision 2041 - Strategy for Developing Inland	The aim of this initiative is to support the growth of border tourism and multi-country tourism corridors to reinforce Bangladesh as a BIMSTEC Hub.	TI-2.3/A: Efforts to improve efficiencies and conveniences at border crossings ⁴⁹ should be supported.	BTB, MoCAT		
		TI-2.3/B: Revising regulations for more conducive border crossings. Visa rules for land arrival should also be in-line with those of air arrival.	BTB, MoCAT		
		TI-2.3/C: To improve the accessibility of borders. Road quality to key border check-points should be improved with pavements and lighting installed. More reliable and higher quality public transport services are encouraged as a means to facilitate land border crossing. Bangladesh should consider offering a single transportation ticket that can be used for all modes of transportation among the divisions in 22 prioritized clusters, including the	RHD, LGED, BRTA		

⁴⁸ To increase intra-BIMSTEC travel and reinforce Dhaka as a stopover for long- and medium-haul flights to BIMSTEC destinations, the government should promote more flights from more cities, especially within the BIMSTEC region. In order to compete with other regional hubs, the airlines should consider enhancing the availability, variety, and quality of stopover packages.

⁴⁹ Clear information regarding visa rules for border crossing should be made available at ease. Investment in technologies, such as automated passport control kiosks, can significantly improve efficiencies. Having more information signs at borders, preferably in multiple languages, to clarify the documents required, visa fees and the related rules, can help reduce confusion and potential fraudulent behavior

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Water Transport, Pg 176 8th 5YP – Strategy for Developing Inland Water Transport (IWT), Pg 403)		installation of card readers on vehicles. Moreover, it should identify and produce maps that show all modes of public transports in each of the strategic clusters including train, ferries, shuttle buses, public bus, and public vans			
TI-2.4: Optimize domestic air transport to improve connectivity between primary and secondary cities (SDG-9,11, Vision 2041- Strategy for Air Transport, Pg 177 8th 5YP – Strategy for Air Transport , Pg 405)	The limitation of airport access is one of the hindrances to develop the secondary areas into key tourism attractions. The expansion of air transportation capacity should prioritise cities with a high potential for tourism. In addition to improving its capacity, air transport facilities, as well as airport services and amenities such as restaurants and shops should also be improved.	TI-2.4/A: Expanding airport capacities and enhancing airport facilities.	MoCAT, CAAB		
		TI-2.4/B: Feasibility studies should be conducted on the establishment of a new airport at tourist destinations. The government should also consider collaborating with airlines to optimise domestic flight routes, increase affordability, and launch more direct flights between cities not subject to Dhaka connections. Domestic flight frequency and schedules should be accommodating for tourists.	MoCAT, CAAB		
TI-2.5: Improve domestic land transport such as extensions and improvements of motorways, to promote safety in traveling for tourists as well as establish shuttle bus systems that cover key tourist attractions (SDG-7,9,	This is intended to support the development of tourism corridors, thereby encouraging visits to more destinations and longer overall stays, by facilitating domestic and foreign travel. Well-designed criteria and scoring systems for transport infrastructure and services should be established, to rate different types of providers and cover various quality	TI-2.5/A: The improvement in motorways to and within the strategic cluster will enhance the experience of road transportation. Motorways out of Dhaka to different key regions should be widened to 4 lanes to improve accessibility by road in and out of the capital. Motorways connecting primary cities and secondary cities in each region and roads to key border checkpoints should also be expanded according to the traffic demand forecasts.	Bangladesh Roads and Highway Department (RHD), Local government Engineering Department (LGED)		
		TI-2.5/B: Enhance services that facilitate tourists' travelling by road, by developing high-quality tourist-oriented shuttle buses (based on renewable energy) between cities, providing clear route maps and information on scheduling.	RHD, LGED, BRTA, BTB		
		TI-2.5/C: Technologies should also be leveraged to deliver more convenient experiences for tourists, such as the offer of user-friendly online booking platforms and information portals in various languages.	RHD, LGED, BRTA, BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Vision 2041 - Strategy for road transport, Pg 174 8th 5YP –Strategy for Road transport, Pg 399,400)	dimensions: efficiency, cleanliness, ease of accessibility to elderlies and disabled tourists; this will support tourism for all.	TI-2.5/D: Emphasize on enhancing road safety. Laws and regulations with regard to quality of bus services and quality of car rental companies, should comply with the international standards.	Bangladesh Road Transport Authority (BRTA)		
TI-2.6: Improve train transportation network through development of network covering destinations across Bangladesh and connects with neighboring countries as well as the standard level of travel supporting facilities (SDG-9,11,17, Vision 2041 - Strategy for Railway Development, Pg 175 8th 5YP – Strategy for Railway Development , Pg 402)	In GCR 2018, Bangladesh was ranked 121 out of 140 on road connectivity index. It performed better on railroads parameters: 40 for railroad density and 68 for efficiency of train service. This strategy will help in to reduce travel time and improve passengers' experiences in order to elevate railway as common mode of tourist transportation and not only for the budget tourists.	TI-2.6/A: To elevate the quality of Bangladesh railway transportation is to invest in improving the passenger experience. The quality of the trains and the stations should be improved to meet international standards, especially in terms of safety and hygiene.	Bangladesh Railways		
		TI-2.6/B: Booking and purchasing platform should be refurbished, leveraging technologies to provide greater accuracy and ease of access to both domestic and foreign users.	Bangladesh Railways,		
		TI-2.6/C: To enhance the efficiency of train travel, investments /improvements should be made to reduce train travel time	Bangladesh Railways		
TI-2.7: Promote intra-city transportation such as extension and improvement of quality of transportation services, as well as	Based on primary surveys, it was observed that, light transportation options are recommended especially for key tourist cities that lack public transportation infrastructure, such as	TI-2.7/A: To improve the quality of existing transport options in Dhaka. This can be achieved by extending mass transit networks, and improve capacities and quality of public boat services.	RHD, LGED		
		TI-2.7/B: The range of transportation options between key tourist cities should be developed.	RHD, LGED		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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the widening of choices in travel (SDG-9,11 Vision 2041- Strategies for Urban Transport Development, Pg 179)	monorail or Tram. To better support the tourism industry, tourist-oriented sightseeing buses within or around the cities should be established, similar to hop-on hop-off bus in the European cities	TI-2.7/C: To improve the infrastructure for bike/bicycles in areas with lots of tourist attractions	RHD, LGED		
		TI-2.7/D: Improving the walkability of streets to promote sightseeing on foot in key cities including in old town Dhaka will create greater convenience and satisfaction for both tourists and local citizens	RHD, LGED		
TI-2.8: Develop and improve apps that facilitate and provide nationwide comprehensive information across all modes of transportation. (SDG-9, Vision 2041- Strategies for Urban Transport Development, Pg 179)	According to primary surveys, booking trips, planning trips, and navigating around Bangladesh using smartphone apps and other technologies is quite difficult for independent travelers.	TI-2.8/A: Build and launch integrated information databases and booking platforms, such as Tourism Gateway, with a comprehensive database of tourism offerings in the country, including hotels, transportation, activities, and bundled offerings, to facilitate trip planning and booking for these independent travelers.	BTB, Bangladesh Road Transport Authority (BRTA)		
		TI-2.8/B: Develop and distribute apps that make it easier for tourists to navigate Bangladesh, possibly by creating a Virtual Reality app that provides 3D maps and directions and thus facilitates navigation. The application should be able to easily suggest and guide tourists to attractions.	BTB, Bangladesh Road Transport Authority (BRTA)		
		TI-2.8/C: Develop a Journey Planning App, which displays all travel options from the searched routes including schedule, price, and recommended transportation routes. This one-stop app can facilitate tourist in navigating around Bangladesh.	BTB, Bangladesh Road Transport Authority (BRTA)		
		TI-2.8/D: Implementation of Intelligent Traffic Management System (ITMS)	BTB, Highway Police, traffic Police		

Key Strategy	Key Findings	Priority Actions	Institution	*	**
FACILITIES					
	Only 3% of destinations have signage facilities. Most	TI-3.1/A: Design and develop navigation signage on access roads leading to the destination	BTB, LGED, RHD		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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TI-3.1: Developing Signage as per international standards (SDG-11)	of the tourist sites specially for the remote ones, no signages has been provided on access roads leading to the destination. As a result, it is very difficult for the tourist to find out the location of the site.	TI-3.1/B: Design and develop signage providing information regarding different types of amenities (accommodations, restaurants, washrooms, etc) in and around tourist destinations.	BTB, LGI		
		TI-3.1/C: Design and develop informative boards at public places such as Entry and Exit points of Airport, Rail Station, Bus Station, River/Sea Port/landing stations.	BTB, LGED, RHD		
		TI-3.1/D: Install multi-lingual signage boards with information provided in both Bangla and English language.	BTB		
		TI-3.1/E: Develop Audio/Visual digital guides for assisting elderly or physically handicapped people	BTB		
TI-3.2: Boosting service quality of public restrooms and waste management facilities at tourist destinations (SDG-6,11,13,15, Vision 2041- Vision for Urban Sector, Pg 187)	None of the infrastructure facilities is available in more than 50% of the tourism sites. This is very alarming considering the fact that Bangladesh is trying to attract foreign tourist to increase tourism sector contribution in GDP. Lack of facility also results in depleting the environment of the sites and its values to the tourists	TI-3.2/A: Construct new toilet facilities to ensure sufficient availability - facilities should be self-reliant, with the support of local community/administration to ensure toilet maintenance.	BTB, LGI, DPHE, Concerned owner of the site		
		TI-3.2/B: Ensure information signs is visible onsite with instructions on appropriate etiquette to maintain proper hygiene. Enforce through usage of fines in case of non-compliance	BTB, LGI		
		TI-3.2/C: Provide separate trash containers (based on type of waste) at strategic locations for all tourist destinations.	BTB, LGI, Concerned owner of the site		
		TI-3.2/D: Work with the private sector to develop waste disposal and recycling centres in key locations, with input from communities and the public sector. ..	BTB, Private sector		
		TI-3.2/E: Develop hygiene standards targeted to all stakeholders and the general public. Provide annual incentives to management organizations/service providers/local businesses based on compliance.	BTB, LGI, DPHE		
TI-3.3: Improving safety services to	Only 25% of the sites have security facilities and among these only a negligible percentage is having a good	TI-3.3/A: Install additional CCTVs (if required) and smart LED street lighting to reduce blind spots and dark areas at tourist destinations.	BTB, Police Dept, Concerned owner of the site		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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maintain visitor confidence (SDG-11, 16)	quality security facility. This is one of the reasons why foreign tourist don't feel comfortable to visit the sites alone in Bangladesh	TI-3.3/B: Ensure provision of walkie talkies to security personnel at areas where mobile network frequency is limited (such as in hilly areas or forests)	BTB, Police Dept,		
		TI-3.3/C: Ensure women safety through appropriate safety features incorporated in proposed tourism app, providing information such as safety tips, emergency hotlines, real-time location sharing, etc.	BTB, Police department, District Administrator office		

Key Strategy	Key Findings	Priority Actions	Institution	*	**
COMMUNICATION AND INFORMATION					
TI-3.4: Combining elements of the latest ICT technologies, for data collection and analysis (SDG-9, 16 Vision 2041- Strategy of Exploiting Digital and Innovation Opportunities , Pg 156 8th 5YP –Strategy directions for digital economy in the 8 FYP, Pg 659)	Even though Bangladesh is working towards digital Bangladesh, still now many of the activities regarding the tourism development is being done manually including the data collection and processing. For automation and better decision-making latest technologies need to be adopted.	TI-3.4/A: Foster cross-sector and inter-Ministerial collaboration to harmonise and implement ICT regulations and policies.	BTB, ICT- Division		
		TI-3.4/B: Optimise the use of big data and analytics to inform tourism planning and development	BTB		
		TI-3.4/C: Adopt contactless data acquisition technology for acquiring real-time visitor information/feedback at entry and exit points	BTB, CAAB		
		TI-3.4/D: Facilitate knowledge transfer and strengthen digital competence particularly among MSMEs and regional/local governance bodies	BTB, ICT-Division		
		TI-3.4/E: Invest in sensor-based technology for information collection – such as weather monitoring, early disaster warning, pollution control, etc.	BTB, DoE, MoDMR ICT-Division		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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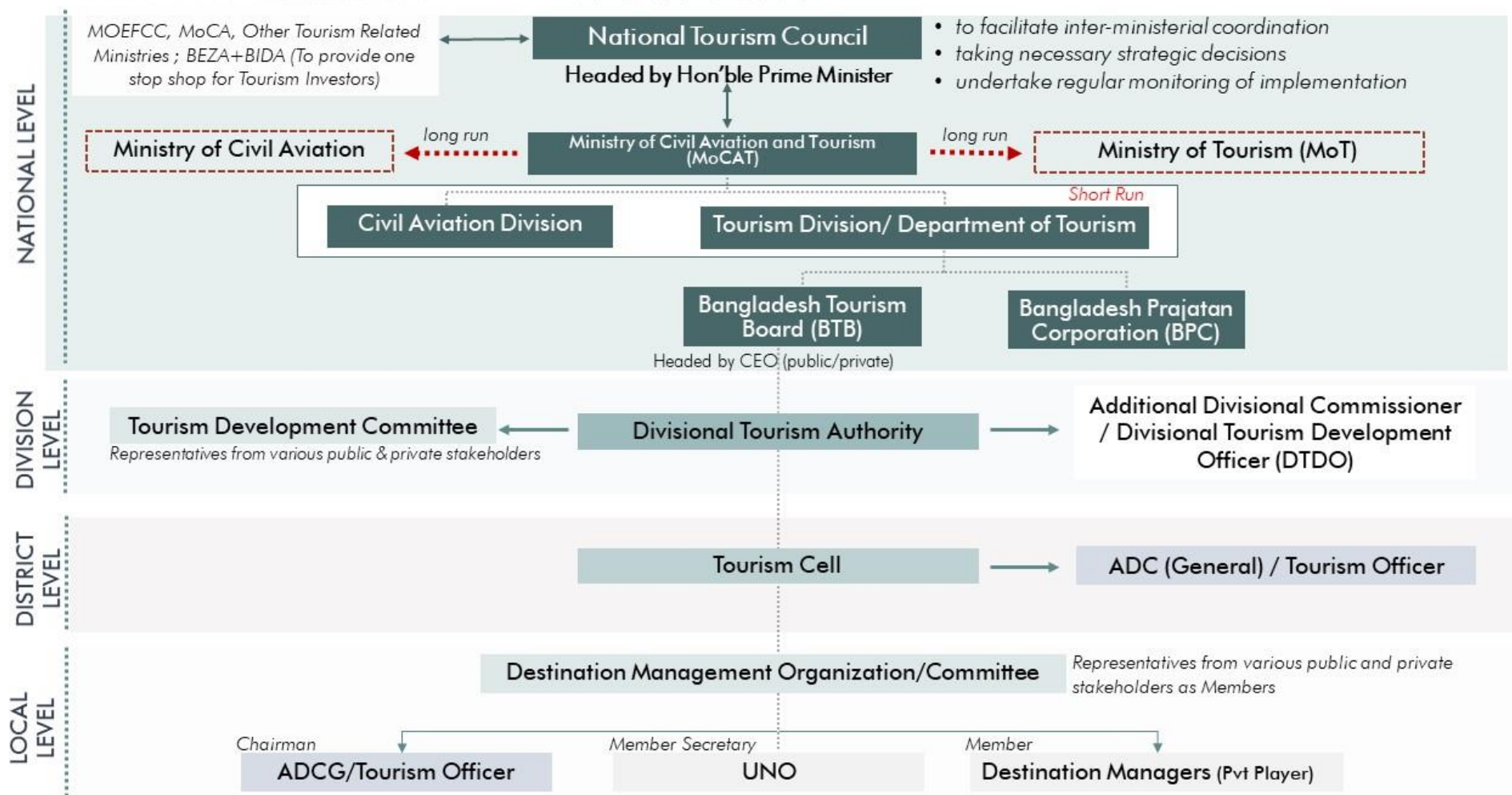
TI-3.5: Improve information availability for tourists at tourist destinations/public places (SDG-11,16 Vision 2041- Communications, Pg 179 NTP- Ch2 (xiv) Pg 5)	No availability of organized Tourism information Centres (TIC) which is equipped with all the information which a tourist would be needed during his / her travel. Tourist needs a one stop service like centre where he/ she can find all the information related to travel in one place.	TI-3.5/A: Install Wi-Fi hotspots at Tourist nodes and Public Places (Terminals, shopping mall, Tourist Information Centre etc.) .	LGI, BTB, BR, BRTA, CAAB		
		TI-3.5/B: Develop well-equipped Tourist Information Centres at airport terminals, stations and other public places providing free Wi-Fi, cheap SIM cards, information related to transport, hotels, guides etc.	MoCAT, BTB, CAAB		
		TI-3.5/C: Develop standard visitation centres and food/water kiosks outside the national parks with strict waste management measures	LGI, BTB, FD		
TI-3.6: Develop and improve apps to better facilitate tourists (SDG-9,16, Vision 2041- Communications, Pg 179)	At the moment in only a few districts under the tourism cell, the District Administration office has developed app with the information of the sites and its location. So, there is huge scope of developing a tourism apps incorporating all the districts' sites and locations along with other facility details like hotel, restaurant, transport service etc.	TI-3.6/A: Develop and launch tourism app incorporating features such as navigational maps, transportation routes, hotel prices, itinerary planning, etc.	BTB, ICT-division		
		TI-3.6/B: Collaborate with local telecom providers to promote usage of tourist SIM cards with promotional offers for free data/calls.	BTB, BTCL, Telco service providers		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.4 Institutional and regulatory framework

DRAFT INSTITUTIONAL FRAMEWORK



Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
IR-01: Re-establish the National Tourism Council (NTC) as a PM-led Cabinet Committee. (SDG-16 NTP- Ch 2(xv) Pg 5)	It is evident that presently the NTC is not convened very regularly, leading to a lack of supervision and coordination in implementations of major tourism specific programme	IR-01/A: Proposal in this regard may be sent to the Cabinet Division through the office of Secretary/Minister MoCAT	The Cabinet is to take a final decision in this regard. Minister/Secretary of MoCAT may be responsible, with support from CEO BTB		
		IR-01/B: Cabinet division to take decision under guidance of the Hon'ble Prime Minister			
IR-02: Creation of a separate tourism division under MoCAT and separate tourism ministry in long run (SDG-16)	Major focus of the MoCAT currently is taken up by issues of Civil aviation and O&M of Biman Bangladesh airline, rather than on Tourism development issues	IR-02/A: Creation of Separate Tourism Ministry	The authority for creation of a Ministry lies with the cabinet led by the Hon'ble Prime Minister. The Minister/Secretary of MoCAT should be responsible for forwarding the proposal.		
		IR-02/B: The cabinet led by the Hon'ble Prime Minister may take the decision regarding the same.			
IR-03: Transform BTB as a tourism board with elaborately defined roles and responsibilities and increased Private Sector representation (SDG-16)	There is a perceptible lacuna in terms of availability of technical personnel in the administration of the BTB. Officials are posted in the board for a few years and then transferred out. Representation from the Private sector in high level decision making is	IR-03/A: Provisions regarding the new structure of the Board and its roles and responsibilities shall be made part of the provision of the new National Tourism Act	Secretary/Minister in charge of Tourism may propose this bill for the consideration of the Cabinet, who may then take a decision to get it passed in Parliament.		
		IR-03/B: The bill for the new National Tourism Act can be drafted by the BTB and forwarded for the consideration of the Secretary/ Minister of Tourism			

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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	insufficient. Roles and Responsibilities of the board are not sufficiently defined in the current BTB Act.	IR-03/C: The Minister of Tourism can forward the bill for the consideration of the cabinet. Cabinet can then get the bill enacted in the Parliament.		
IR-04: Initiate a programme to Privatised public assets in civil aviation (including Biman Bangladesh Airline) (SDG-16)	Service quality of Biman Bangladesh Airline, needs to improve drastically if it is to compete with the best in the world. The financial drain on the exchequer is another major concern of operating a National Airline. International experience with Privatisation of National carriers have shown promising results. Free market competition between private commercial airlines operating from a level playing field, leads to improvement in service standards for passengers.	IR-04/A: Feasibility studies, Stakeholder consultations and wide-ranging discussions must be carried out first in order to create public opinion in this matter. Based on these studies, a decision should be taken on: • Disinvestment- operating the airline in partnership with an experienced private airline operator • Complete Privatization of the Airline	Minister/Secretary of MoCAT should be responsible for moving the proposal/bill. Cabinet will take the final decision.	
		IR-04/B: Proposal/Bill in this regard may be sent to the Cabinet Division through the office of Secretary/Minister MoCAT		
		IR-04/C: After approval of the Cabinet led by Hon'ble Prime Minister, the Bill can be moved on the floor of the Parliament and be formally enacted therein.		
IR-05: Initiate a programme to increase private sector participation in operation of BPC assets like Hotels, Guest Houses, etc. (SDG-16 NTP- 3.2.7 Pg 8)	Quality of service in most of the properties (hotels/motels) being operated by BPC, is much below international standards. Involvement of experienced private operators can help drastically improve the management of these properties. In the long run it should be noted that services like Hotel and	IR-05/A: Feasibility studies to be undertaken for considering the possibility and modes of private sector involvement in the operation of assets of the BPC including hotels and motels.	Minister/Secretary of MoCAT should be responsible for moving the proposal. Cabinet will take the final decision.	
		IR-05/B: Proposal/bill in this regard needs to be sent to the Cabinet Division through the office of Secretary/Minister MoCAT.		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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8th 5YP – Tourism facilities and support services, Pg 276)	Restaurant are best operated by the private sector.	IR-05/C: After approval of the Cabinet led by Hon'ble Prime Minister, the Bill can be moved on the floor of the Parliament and be formally enacted therein.		
IR-06: BEZA/BIDA (or equivalent) to provide a one-stop-shop for tourism investors (SDG-16 NTP- (xi) Pg 5)	Complex procedures and related delays make investments less attractive in Bangladesh. There is no dedicated organisation for providing a one stop solution for investments in tourism sector.	IR-06/A: A dedicated Tourism Wing to be established in BEZA/BIDA which will look at Tourism and Hospitality related investments both in SEZs and outside SEZs. IR-06/B: BEZA/BIDA to have permanent representation of BTB in order to advise on matters relating to investments in the tourism sector.	BEZA/BIDA as instructed by the Cabinet Division. A proposal for the same may be moved from the office of the Secretary/ Minister MoCAT.	
IR-07: Divisional Level Offices of the BTB and Destination Management Organizations (DMO) at cluster and local level (SDG-16 NTP- (xvi) Pg 5)	Divisional level coordination and supervision of tourism related projects is missing. There is a lack of coordination between the Dhaka level planning and ground level execution of key tourism projects.	IR-07/A: Tourism Cadre should be created. These can be set up under the BTB with funds allocated in the Budget for the same.	CEO BTB should propose and the Secretary MoCAT has to get the budget approved	
IR-08: Promulgation of a National Tourism Act as an umbrella legislation for the tourism sector (SDG-16)	There is a pressing need for a legislation which accommodates all major aspects of tourism. At the moment there are multiple laws which govern different aspects of Tourism with little synergy between them.	IR-08/A: The Bill can be drafted by a Committee of the MoCAT and sent to the Cabinet Division for approval. IR-08/B: After approval of the Cabinet led by Hon'ble Prime Minister, the Bill can be moved on the floor of the Parliament and be formally enacted	Ministry responsible for tourism should be the authority designated for setting up a drafting committee for the bill, with the Cabinet led by the Hon'ble Prime Minister having ultimate responsibility of enacting the legislation	

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.5 Business enabling environment for investments

Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
BI-01: Expansion of BIDA's activities for investment marketing (SDG- 16,17 Vision 2041- Digitization and service transformation, Pg 148 8th 5YP – Tourism facilities and support services, Pg 276 NTP- 5.4 Pg 12)	Limited marketing initiatives for proactive promotion of investment opportunities taken up by national investment promotion agency (BIDA) with little to no focus on tourism industry	BI-01/A: Increasing footprint in target international markets BI-01/B: Adoption of modern marketing tools such as digital marketing BI-01/C: Maintaining investor database and facilitating tie-ups between local and foreign investors BI-01/D: Clear categorization of FDI inflow in tourism sector for effective tracking BI-01/E: Representation of tourism sector at par with other priority industries on BIDA website and other marketing platforms BI-01/F: Upgradation of 'One Stop Service' portal for inclusion of tourism related services	Bangladesh Investment Development Authority		
BI-02: Establishing Tourism as Priority Industry (SDG- 16,17 NTP- 3.1.1, Pg 6)	Lack of focus on tourism centric policies and development plan	BI-02/A: Granting 'Industry' status to Tourism BI-02/B: Promotion of tourism initiatives on national forums BI-02/C: Preparation of detailed National Tourism Policy document underlining key strategies and plan of action for development of tourism assets BI-02/D: Establishing 'Project Development Cell' for tourism development via PPP mode BI-02/E: Creation and regular updating and maintenance of tourism centric datasets	National Tourism Council		
BI-03: Digital overhaul of taxation system (SDG-16 Vision 2041- Approach to Fiscal Operations, Pg 30)	Low overall tax collections caused by limited registered tax base and inadequate measure for payment enforcement	BI-03/A: Data synergy between government departments for identification of tax evasion attempts BI-03/B: Incentivization for adoption of digitized book-keeping and point-of-sale systems for MSMEs Review and simplification of tax e-filing infrastructure	National Board of Revenue		
BI-04: Tax Incentives for development of tourism industry (Corporate and Consumer) (SDG- 9,16 8th 5YP – Tourism facilities and support services, Pg 276 (NTP- 5.4(c), Pg 12)	Limited attractiveness of tourism industry due to nascent stage and unproven market appeal	BI-04/A: Granting 'Infrastructure' status to hotels, cruises and other capital-intensive hospitality projects BI-04/B: Tax exemptions (limited tenure) for hospitality infrastructure development projects in line with other priority sectors BI-04/C: Tax breaks to MSMEs providing tourism/hospitality services to incentivise digitization and promote adoption of green practices BI-04/D: Deductions against domestic tourism receipts from taxable income BI-04/E: VAT reimbursement for foreign inbound tourists	National Board of Revenue with inputs from National Tourism Council		
BI-05: Government backed specialized	Limited access to specialised financing for	BI-05/A: Provision of structured credit for development of tourism/hospitality centric businesses	Bangladesh Tourism Board (BTB) with support of		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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tourism financing institution and improving access to finance for MSMEs in the industry (SDG- 16 NTP- (xi) Pg 5)	tourism/hospitality development and lack of credit availability to MSMEs for providing tourism-based services	BI-05/B: Provision of relevant business advisory services and frameworks for best practices in tourism operations BI-05/C: Policy structure to provide credit guarantee to MSMEs in the sector	Bangladesh Infrastructure Finance Fund Ltd (BIFFL)		
BI-06: Additional funding options for tourism-based development projects (NTP- 3.1.4 Pg 6)	Limited offerings in terms of financially feasible tourism projects offered by the authority and unavailability of enabling/support infrastructure to attract additional financing	BI-05/D: Identification of key enabling infrastructure projects for private development with access to 'Viability Gap Funding' where required BI-05/E: Identification of well-structured and financially viable hospitality projects for development via PPP mode	Bangladesh Tourism Board (BTB) with support of National Tourism Council		
BI-07: Overhaul of business registration and permit procedures	Complicated and time intensive procedures for starting a business and obtaining relevant permits	BI-07/A: Detailed review of construction clearance process and identification of key bottlenecks BI-07/B: Adoption of modern tools and end to end online procedures for automation and increased processing capacity BI-07/C: Fixed approval timeline mandates and deemed approvals if delays from department BI-07/D: Preparing basket of pre-approved projects for private participation under PPP model	City Development Authorities (i.e., RAJUK, Chittagong Development Authority, etc.)		
BI-08: Consolidation of land parcels (SDG- 16, National Land Use Policy; BDP NTP- (xxv) Pg 5)	Limited availability of encumbrance free land and challenging land acquisition process	BI-08/A: National level survey for identification of available government landbank BI-08/B: Digitization of land ownership records and improved access to dataset BI-08/C: Identification of tourism zones for development of projects under PPP model	Land Record and Survey Department		
BI-09: Improvement of debt recovery process (SDG- 16 NTP- 5.4(f) Pg 12)	Poor recovery rate and time-consuming resolution in cases of bankruptcy and insolvency	BI-09/A: Review and enhancement of existing National Bankruptcy Law BI-09/B: Establishing specialized tribunals for fast tracking priority cases BI-09/C: Enabling collaboration between lending institutions regarding exchange of credit data	Ministry of Commerce		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.6 Safeguards and management

Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
SG-01: Development of tourism industry while ensuring healthy communities, promoting girl education, and enhancing livelihood conditions in the region (SDG-3,4,5,11,16, 8)	Project related activities may directly, indirectly or cumulatively change community exposure to hazards. So, health of the community should be undermined while development of tourism projects and the risks should be mitigated. People should be free to move from agriculture to tourism, but it's crucial that this drift is monitored with appropriate adaptation made.	SG01/A: Encourage the introduction/expansion of environmental infrastructure for host communities, whenever there is tourism development, as this will mitigate the risk of resentment towards tourism and also help improve the health and well-being as the local community, from which many employees are likely to be drawn.	MoE NDMC, Ministry of Food and Disaster Management, Planning agencies		
		SG01/B: Manage the risk of children (esp. girls) drifting out of education and into employment in tourism and hospitality, including the informal sector (including child labour and abuse). Incentivise families to keep their children in school, and disincentivise businesses from employing and exploiting children (including through trafficking and prostitution)			
		SG01/C: The drift from agriculture to tourism sector should be monitored with appropriate adaptation measures. The harvest (and agricultural production generally) needs to be safeguarded.	MoE, NDMC, Ministry of Food and Disaster Management		
SG-02: Ensuring Cultural and communal integrity (SDG-11,12)	Sometimes, tourist activities offend the sentiments and cultural values of the local population. So, there is a need for code of conduct to make tourist aware about the tradition and values of the host communities and what activities should not be conducted to ensure harmony.	SG02/A: Tourism activities should be conducted in harmony with the attributes and traditions of the host regions and in respect for the laws, practices and customs	NDMC, MoE		
		SG02/B: The host communities, on the one hand, and local professionals, on the other, should acquaint themselves with and respect the tourists who visit them and find out about their lifestyles, tastes and expectations	NDMC, MoE		
		SG02/C: Code of conduct should be prepared for tourist behaviour listing the guidelines about the necessary behaviour to be conducted in front of the local communities, such that it doesn't harm their sentiments.	NDMC, MoE, Ministry of Food and Disaster Management		
SG-03: Formulate national level regulations on tourism	Unregulated Development in environmentally sensitive areas	SG03/A: Develop guidelines for eco-tourism at national level to restrict tourism activities (like unsustainable water extraction, inadequate waste management)	BTB, Ministry of Environment		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
development within a goal to promote sustainable and responsible tourism development while safeguarding environmental resources. (SDG-16,17, Vision 2041- Strengthen Environmental Coordination and Environmental Institutions, Pg 206 NTP- 3.2.2 Pg 7 BDP- Goal 4, Pg 15)	and around eco-tourism assets is a major concern which can deter Bangladesh from leveraging the potential of important targeted international themes such as eco-tourism/wildlife tourism, beach tourism, river tourism, etc. There are guidelines for formulation of CMCs, with revenue sharing mechanism but its on ground implementation is questionable.	with clear articulation of carrying capacity and other interventions/roles and responsibilities.			
		SG03/B: Strengthen and implementation of the protected area with respect to management of tourism activities with proper zones identified for tourists, clear methodology and enforcement of carrying capacity and benefit sharing (tourism and related activities) and co-management with the local communities	BTB, MoE		
		SG03/C: Creation of wildlife corridor for unhindered movement of wild animals and prohibiting tourism activities in those zones for ensuring safety of wildlife.	MoE		
		SG03/D: Maintain public access to all beaches, and no tourism facility (hotel, restaurant) can be built within 30 (?) metres of the high water mark.	BTB, Ministry of Environment, UDD		
		SG03/E: Strengthening of the existing Co-management committees (CMCs) ⁵⁰ with efficient regulation and revenue sharing mechanism of tourism activities. This inline is likely to benefit the conservation effort and promote local livelihoods.	BTB, MoE, CMOs, DoF		
		SG03/F: Ensure all projects get necessary environmental clearance before initiation and strict monitoring after clearance needs to be done with timely renewal of EC for all the projects	MoE		
SG-04: Information Disclosure and Stakeholder Consultation (SDG-11,12)	Lack of recognition, sensitisation and management of ethnic population to tourist activities in Tribal areas. Exploitation of resources without appropriate benefits accruing to the local communities	SG-04/A: Project related necessary information much be made public at all stages of the project, so that all the local communities would be aware about the benefits or impacts arising from the project.	Ministry of Environment		
		SG-04/B: Identify and assess risks to, and potential impacts on, the safety of affected communities during all stages of the project and Involving ethnic people as a major key stakeholder for tourism related development projects	Ministry of Environment		

⁵⁰ In Bangladesh, the Co-Management Committee area responsible for overall management of the protected area. It prepares an action plan for protecting the forest specifying roles and responsibilities of specific people selected for the purpose.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
SG-05: Promoting sustainable tourism operations (SDG-9,11,13,16,17 BDP- P.6, Pg 25)	Resource efficiency and energy security can be a major issue in future for tourism industry. No guidelines for operationalisation of tourism activities and tourist operators: There is a need to establish national level guidelines for safety, operationalisation, and ensuring quality of different activities. No green standards at national level for energy efficiency: As of now, there are no green standards for buildings that are being followed up.	SG-05/A: Formulation of transportation management plan for all ITRZ and major tourism sites and tourism clusters with special provision on segregation of traffic, use of NMT, eco-buses, bicycle & pedestrian routes, etc. Promoting and incentivising tour operators using energy efficient transportation systems	Ministry of Roadways, Ministry of Environment		
		SG-05/B: For any new tourism development to be approved (or at least to receive any kind of public support and/or subsidy), it must be carbon-neutral and avoid fossil fuels. In the case of boats, for instance, this means using electric engines, and constructing them out of wood rather than plastic.	Ministry of Environment, BTB		
		SG-05/C: Develop national ecolabels/ standards/ green star ratings for green & energy efficient accommodation facilities including hotels, restaurants, cruises, eco-lodges, homestays.	SREDA, PWD, Ministry of Environment		
		SG-05/D: Develop national level guidelines for operationalisation of activities (including tour operators) related for riverine, beach, adventure sports to ensure the safety of activities and quality of its infrastructure	BTB		
		SG-05/E: Promote accreditation to international ecolabels such as Blue flag for beach tourism, green fins for diving, snorkelling, and other water activities etc.	Ministry of Environment, BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.7 Enabling Environment for Access and Movements

Key Strategy	Key Findings	Action Points	Institution(s)	*	**
AM-1: Creating a tourist-friendly visa process (SDG-17 8th 5YP – Tourism facilities and support services , Pg 276 NTP- 6.3 Pg 15)	Stakeholder consultations revealed the need for a transparent online visa application process. Notably, only Nepal and India do not grant On Arrival Visas to Bangladeshi tourists. The Bangladeshi government should also work towards visa-free travel.	AM-01/A: Permitting visa on arrival for the targeted source countries such as BTB and DIP should work towards changing the “on arrival visa facility” for India, Sri Lanka and Nepal	BTB, DIP, MoFA		
		AM-01/B: Developing policies for E-visa facility	BTB, DIP		
		AM-01/C: Provision of Visa similar to Schengen visa for BIMSTEC, and BIBN countries	BTB, DIP, MoFA		
		AM-01/D: Facilitation of Visa at Cruise ships for international tourist entering through Ocean Cruises.	BTB, DIP, BCG		
AM-2: Organisation of public-private-public collaboration and integration in tourism development and management, including international cooperation (SDG-17 NTP- 6.8 Pg 17)	As part of stakeholder consultations, an emphasis was placed on enhancing regional travel convenience through collaborative efforts between the countries (BIMSTEC) to reduce administrative hurdles and create a regional visa. Exorbitant visa fees is also the hurdle for less well-off travellers.	AM-02/A: Creation of unified regional visa and reducing administrative barriers to entry	BTB, MoFA		
		AM-02/B: Creation of National one-stop service centers, to facilitate foreigners in Bangladesh, as well as those looking for winter getaways, which provide assistance in all related matters, such as visas and accommodation	BTB, DIP		
		AM-02/C: Propose and initiate the formation of a multinational taskforce to investigate the implementation of a single required visa -BIMSTEC hub	DIP, BTB, MoFA		
AM-3: Relaxing Regulations at Border	Currently, the convenience of land border crossings is not great with several issues reported, such as	AM-03/A: Efficiencies and conveniences at the border crossing should be enhanced	BTB, DIP		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Action Points	Institution(s)	*	**
(SDG-17 Vision 2041- Strategy for road transport, Pg 174 8th 5YP – Border Guard Bangladesh, Pg 190 NTP- 6.3 Pg 15)	limited and misaligned opening hours, less generous visa rules than by air arrival, and long queues. Improvements are critical in supporting tourism at border areas and in the development of multi-country tourism corridors	AM-03/B: Clear information regarding visa rules for border crossing should be made available at ease	DIP		
		AM-03/C: Investment in technologies, such as automated passport control kiosks, can significantly improve efficiencies.	MoCAT, BTB, DIP		
		AM-03/D: Establishing more information signs at borders, preferably in multiple languages, to clarify the documents required, visa fees and the related rules, can help reduce confusions	BTB, BGB, DIP		
		AM-03/E: Visa rules for land arrival should also be in-line with those of air arrival. To support tourism by car, the government should also encourage car rental companies to ease out inter-regional car crossing permits. These regulation adjustments should consider national security and the safety of tourists as priorities.	BTB, DIP, BGB		
		AM-03/F: Reexamine regulations pertaining to tourism segments and revise them so as to promote the segment's growth; for example, in Marine tourism (yacht rental, visas parking of yacht), Homestay tourism, and Long-stay tourism (retirement visas).	BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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5.8 Human Resource Development

Key Strategy	Key Findings	Priority Actions	Institutions	*	**
HRD – 1: Improve education standards in Tourism and hospitality institutes that tailors the industry needs with special focus on practical training and as per market needs. (SDG-4, Vision 2041- Strategy for Training and Skills Formation, Pg 60 NTHCDS ⁵¹ : SG 1, SO 2, Pg 170 NSDP- Sec 4.2.2.3, Pg 82 NTP- (xxii) Pg 5)	At present, there are 52 nos. institutes which provides diploma, degree and management courses in tourism and hospitality industry which generates 3218 manpower every year (only 1081 have done BBA in Tourism and Hospitality Management and the rest have passed form training institutes). However, the quality of resource created is found to be below standard as per industry specialists. This is attributed to outdated curriculum (lack of practical training, no knowledge about ICT skills etc.), lack of qualified teachers, gap between knowledge being provided in educational/training institutions and the practical skills required in the tourism and hospitality industry etc.	HRD-1/A: Establish a 'National Council for Tourism and Hotel Management' (NCTHM) under MoCAT which will affiliate institutions; review and improve courses curriculum as per international standards (include practical training, ICT skills etc.), add new courses as per market requirements, prescribe standards for buildings and equipment; allocation of funds, prescribe educational qualifications of staff/ trainers and provide training, accordingly, monitor standard of education etc.	MoCAT, BTB, TEAB and universities		
		HRD-1/B: Encourage existing training institutions/ universities by affiliating with NCTHM	NCTHM, Universities		
		HRD-1/C: Enhance the university and industry linkages nationally and internationally by organizing seminars with industry experts, collaboration with international institutions, formation of placement cells at university level etc.	BTB, Universities		
		HRD-1/D: Encourage international hotel chains to take initiatives in hospitality and tourism management through in-house training programs/ courses etc.	NCTHM, international hotel chains		
		HRD-1/E: Organize annual career fairs in Dhaka or divisional capital which will help students/ youths get internships and jobs both nationally and overseas. The placement cells from all respective universities will participate in this fair.	BTB, NCTHM and universities		
HRD – 2: Improve the quality of workers already working in the service industry through training programs (SDG- 3,4,10, Vision 2041- Strengthening the Human Capital Base of the Poor, Pg 44)	There are many employment opportunities at all levels in Tourism and hospitality industry in Bangladesh. For instance, currently there are 38247 nos. of managerial positions in accommodation sector while 234 nos. in tour & travel agencies. Due to lack of quality	HRD-1/F: Develop norms and capacity to convert universities/ institutes for providing specialized courses and vocational trainings for tourism and hospitality sector. Such Institutions to be designated as “Center for Excellence” for the tourism industry.	NCTHM, Universities		
		HRD-2/A: Provide certified training/blended (hybrid) educational facilities at three levels: 1. Basic/primary skills (tier I) training to staff that come into direct contact with tourists (tour and trail guides, host coordinators, airline & Immigration staff, tourist police) i.e. language courses, communication etc. 2. Middle/tertiary skills (tier II) training to middle or clerical level staff who have basic qualifications or years of industry experience (e.g., front office, tourism management, travel and tour operations). i.e. journalism and travel writing, environmental and cultural heritage workshops, trainers course etc.	A select group of instructors will provide training at the national level while taking into account regional requirements. (BTB, NHTTI)		

⁵¹ NTHCDS: National Tourism Human Capital Development Strategy for Bangladesh: 2021-2030

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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NTHCDS: SG 2, SO 4, Pg 172 8th YYP – Tourism facilities and support services, Pg 276 NSDP- Sec 4.2.2.3, Pg 82)	professionals, basic etiquettes and communication skills especially in small and mid-range hotels etc., the positions are currently being fulfilled by expatriates.	3. Advanced skills (tier III) training will include project management, marketing, effective communication, property management and specialized tourism products or services. Target groups will be middle- and senior-level personnel who are at a decision-influencing level and who will be responsible for project conceptualization, design, execution, relationships with the private sector, and marketing.			
HRD – 3: Build human capital for growing tourism industry by generating skill development of host communities with special focus on youth and women; encourage local employment and; Improve the job attractiveness of hospitality industry. (SDG-, 4,5,8,10 Vision 2041- Strategy for Training and Skills Formation, Pg 60 NTHCDS: SG 1, SO 1, Pg 170 NTP- Ch 2(vii) Pg 4)	There is unavailability of sufficient skilled and specialized trained staff/ workers in Tourism & Hospitality industry especially beyond Dhaka. As per the “National Tourism Human Capital Development Strategy for Bangladesh: 2021-2030” (a study conducted by TEAB and BTB), it has been predicted that by the end of 2030 there will be a gap between demand (i.e. 38 lacs) & supply (i.e.2.8 lacs). Thus, there is a need to increase the quantum of employment and also to upskill the existing workforce. This gap is due to multiple reasons: • Limited availability/ accessibility to training programs related to tourism across Bangladesh; • Lack of market linkages of educational and training institutes at national and international level; • Hotel Catering & Tourism industry is perceived as unattractive due to odd	HRD-3/A: Raise awareness about benefits of tourism and educate locals through awareness campaigns and outreach programs on the existing cultural heritage & other assets of tourism in their region, gender equality, to increase their participation etc. thru media, short video clips, testimonials and informative materials. So that they become ambassador of tourism for their districts/region and take pride in associating with the industry.	District tourism cell (DTC) to facilitate Grameen, BRAC, NGOs, other private players etc.		
		HRD-3/B: Develop and provide incentivized certified training programs for development of new skill (training in specialized handicraft or handloom work, computer skill) and development of entrepreneurship/business skills (for homestay operator or cruise operators) as per the requirement of the district/division (specific to cluster-based themes) through the existing network of institutes in coordination with district tourism cell. Special reservation/incentives of women participants in training programs should be provided.	District tourism cell (DTC) to facilitate Local colleges/training institutions, Grameen, BRAC, NGOs etc.		
		HRD-3/C: Efforts must be taken to link the trained local community with the market by giving them platform of showcasing their skills in fairs, events and marketing through online platform	BTB and District tourism cell		
		HRD-3/D: Promote the participation of private players with emphasize of women as role models in outreach programs to improve job attractiveness through individualized career paths.	District tourism cell and business owners		
		HRD-3/E: Encourage women participation by providing employment benefits at workplace such as childcare, safe transportation, staff housing etc.	Min. of labour & employment, Tourism enterprises		
		HRD-3/F: A nationwide hospitality award should be deployed to incentivize hospitality workforce and to showcase the value of hospitality services.	BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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	working hours, low salary/ wages, seasonal employment & low job status etc.				
HRD – 4: Strengthen the capacity and capability of staff in Government institutions related to Tourism and Hospitality industry such as MoCAT, BTB, DTC etc. (SDG-4, Vision 2041- Strategy for Training and Skills Formation, Pg 60)	There is a lack of sufficient manpower and specialized experts in government departments to develop the Tourism industry in the country. This is due to shortage of capacity building programs like ICT skills, management skills, marketing skills, communication skills etc. which restricts the ability of government institutions to undertake tourism projects without external assistance.	HRD-4/A: Enhance skills of government officials by organizing capacity building workshops/ training programs at national and local levels related to management, marketing, etc. The training can be provided by national or international institutes or private players to raise the standard of professionals as per international requirements.	MoCAT and BTB to facilitate NHTTI, national or international institutes		
		HRD-4/B: Involve sector-specific experts in planning and management of tourism activities.	BTB and DTC		
		HRD-4/C: Prepare annual training plans to address the requirements manpower in multi-segment tourism sector. The training programs on sustainable tourism management and other-related topics should be a fundamental training for government officials.	MoCAT and BTB to facilitate BIDS and private industry players		
		HRD-4/D: Specific tourism-related training module should be added in BCS (Bangladesh Civil Service) training.	MoCAT, NCTHM and BCS academy		
		HRD-4/E: Develop a formal licensing system for tourism staff to standardized measurement of skills in key professions including tourism and tourism-related professions.	MoCAT and BTB		

5.9 Cluster Development Strategies

Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
CD-1: Improve and expand the range of	According to the findings of the situation analysis, the range and	CD-01/A - Develop events as tourism catalyst ⁵²	Shilpokala Academy, BTB		

⁵² A raft or boat race on the River Sangu or a trail running race around the Ruma and Boga lake area are two examples of events that could fall under this category. Local community festivals organized by tourism and community organizations to highlight the region's unique assets, attract tourists, and foster community involvement and pride. For instance, this could be a local food festival or a local music/choir festival.

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
experiences, facilities, and services (collectively referred to as "products") available in the clusters in order to meet the needs of target markets. (SDG-11,17 Vision 2041- Commitment for Strategic Trade Integration with World Markets, Pg 13 NTP- (xviii) Pg 5)	quality of tourism products available in the entire country, particularly in the outlying tourism areas of Jafong (Sylhet), Ruma and Tanchi (Bandarban), Sundarbans etc. are limited. The government and the private sector must invest in improving tourism products in order to encourage visitors to stay longer and spend more money. Depending on the activity, different market segments (Adventurers, Tourists, VRF, etc.) have different requirements. There are a variety of options available, ranging from simple and relaxing outdoor activities (such as picnics, boat rides, short walks to waterfalls, scenic vehicle trips, shopping for local handicrafts and produce, meals at local eateries, and local cultural performances) to more challenging and adventurous activities (such as mountain biking, trekking, off-road drives, kayaking and riding the river rapids, mountain climbing, etc.). All possible tourism experiences should be identified, documented, and communicated to potential tourists in a clear and understandable manner.	CD-01/B - Consideration and funding to be given to off-season tourism marketing, promotions and communications, group meetings and destination development activities such as infrastructure development, product development, events & festivals; and other co-produced activities related to cultural arts activities including galleries, live music, performance venues and museums to extend stays and help reduce seasonality issues.	Department of Culture, Ministry of Hill District, BTB		
		CD-01/C - Initiate a sustained tourism development and investment program aimed at expanding and maintaining the range of tourism products and experiences available to visitors, as well as strengthening the capacity of local tourism service providers. Priorities should include expanding and improving tourist accommodations/homestays, improving the quality, hygiene, and variety of food available, as well as providing and upgrading basic amenities in popular tourist destinations.	BTB, BPC, LGI		
		CD-01/D - Provide grant concessions on government-owned land to ethnic entrepreneurs (wherever possible), with primary goal of establishing more tourist attracting infrastructure/activities that will complement the existing tourist destinations	CHT Ministry, Min. of Land, MoWCA		
		CD-01/E - Contact tour operators and tour guides to discuss the possibility of incorporating tourism experiences into a larger regional package.	BTB		
CD – 2: Improve the business and investment climate		CD-01/F - Launch a trails development programme in CHT in partnership with local communities and tour guide which will lead to socio-economic development and create livelihood avenues for the community.	CHT Ministry, BTB, Law Enforcing Agencies		
		CD-02/A - Develop a program and package of public-private-community investment support for tourism. Such an investment could include government land concessions, assistance with plan approval, tax breaks, and training assistance, etc.	BTB, MoL, NBR		

Legend:

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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
(SDG-4,9, Vision 2041- Commitment for Strategic Trade Integration with World Markets, Pg 13 NTP- 3.1.2 Pg 6)	development, private sector ownership or partnerships have proven to be the most effective and sustainable model for increasing the variety and quality of tourism lodging, transportation, and other services. Partnerships with the government or with local communities can facilitate private investment. The vast majority of tourism-related entrepreneurs in the region are small-business owners. Seasonality has an impact on their businesses' long-term viability, service quality is generally poor, business knowledge is limited, and the majority of businesses are facing a skills shortage. A large number of businesses do not have the financial resources to expand.	CD-02/B - Establish an enterprise training and mentoring programme and where possible involve more successful and established local and national business owners as mentors.	FBCCI		
		CD-02/C - Establish a small business loan program/scheme (possibly in collaboration with local financial institutions and with support from donor agencies) to assist local entrepreneurs with tourism start-up capital. To address gender imbalances, female entrepreneurs should be prioritized.	FBCCI, Min of Finance		
		CD-02/D - A capacity building program will be required to assist small businesses (with a preference for women-owned businesses) in establishing themselves, improving service levels, and developing business management skills. Two training tiers may be considered:	FBCCI, BTB		
		i) an entry level program that provides basic training in hygiene, customer service, pricing, and basic financial management to community level entrepreneurs; and	BSCIC, BPC, BTB, NASCIB		
		ii) an intermediate program that may include cooking, housekeeping, and online marketing.	BPC		
		CD-02/E - There should be avenues for local SMMEs (Small, Medium, and Micro Entrepreneurs) to obtain financing and form business partnerships in order to improve their facilities and profits.	BSCIC, NASCIB		
CD-3: Market Bangladesh as an attractive and safe tourism destination (SDG-11,16 NTP- 3.1.6 Pg 6)	It will be critical to establish and promote Bangladesh's authentic and largely untouched natural and cultural experiences as unique and special. Bangladesh has a strong emotional impact on visitors, particularly the sense of liberation and enjoyment associated with escaping to a lush and pristine environment. It also has a number of elements that could help it become a brand celebrity – the Largest Mangrove forest (Sundarbans), the Longest sandy sea beach (Coz's Bazar), the hill	CD-03/A - Promote Bangladesh as a must-see destination and make it easy for high-spending domestic travelers to plan and arrange trips through online promotion, promoting the area to travel agents and tour operators in the country, and encouraging positive media coverage, among other strategies.	MoFA, BTB, CAAB, BIMAN		
		CD-03/B - Apply and promote the brand identity at all relevant 'touch points' for tourists.	BTB		
		CD-03/C - Create and endorse sub-brands under the "parent" brand where appropriate.	BTB		
		CD-03/D – The process should be suspended and requirement removed	CHT Ministry, BTB, MoFA		
		CD-03/E - Along key roads, improved tourist road signs and multi-lingual directional signs indicating the major scenic points and directions to towns, resorts, and other destinations.	BTB, RHD		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
	topography (including Keokradong and other mountain peaks), the Sangu River Valley with its numerous waterfalls, Boga Lake, the diversity of cultural groups, and traditional jhum cultivation methods are all newsworthy and could help build a strong brand.	CD-03/F - Start a programme of community volunteerism to assist visitors and look out for visitor safety.	BTB, TP		
		CD-03/G - Create a database of all attractions and experiences with GPS coordinates and use it as the content and interactive map for the website, Facebook page, and proposed information office.	BTB		
		CD-03/H - Initiate a road safety programme with road improvements and driver training.	BTRC		
CD-4: Community Enhancement through the Promotion of Community-Based Tourism (SDG-10,11 NTP- 3.2.9, Pg 8)	The Chittagong Hill Districts/Sundarbans/Buddhist Circuit/ Alpona villages are primarily an exploration destination, with the majority of the region's major attractions located in rural areas. A successful tourism industry in these areas will rely heavily on the local community's willingness, ability, and passion to share and open up their resources, way of life, and culture to tourists. The residents of these areas are unfamiliar with tourism.	CD-04/A - Develop and/or invest in initiatives and projects that foster positive interactions between residents and visitors, celebrate Bangladesh's multicultural heritage, and foster improved relations between communities and the tourism industry.	BTB, Social Welfare Dept.		
		CD-04/B - Develop a policy and ownership structure to support community-based tourism and collaborating with local communities to implement community-based tourism products such as homestays.	BTB, ToAB		
		CD-04/C - To foster a "tourism culture" in the area, practical demonstrations of tourism benefits and opportunities should be made to the local community, and efforts should be made to facilitate and encourage community participation in tourism.	BTB, LGI		
		CD-04/D - Creating an enabling environment that promotes the participation of vulnerable and marginalized groups	BTB, LGI, NGO		
CD-5: Strengthen integrated supply chains by facilitating showcases of local suppliers. (SDG-4,10, Vision 2041- Lack of Easy Credit to Small Farmers and Other Market Intermediaries, Pg 74)	Most aspects of the traditional integrated tourism clusters of enterprises (e.g. suppliers of produce, equipment, transport, maintenance and hospitality services, etc.) are underdeveloped in many clusters. While local communities produce valuable products such as fruit, vegetables, sunderban honey, Shitalpati, and tea, their consumption by tourists and the tourism industry is limited	CD-05/A - Promoting regional tourism products and involving local communities in the process of improving product quality, packaging, and branding, among other things.	BTB, Chambers BSCIC, NASCIB		
		CD-05/B - Providing training to improve product quality and packaging, financial start-up assistance, and assistance to local entrepreneurs in establishing supply chains in the country.	BTB, Chambers BSCIC, NASCIB		
		CD-05/C - Contribute seed funding and organizational support to producers of tourism-related products (handicrafts, foodstuffs, etc.).	Chambers BSCIC, NGO		
		CD-05/D - Strengthen supply connections with hotels, restaurants, and retailers in more developed areas (e.g. Cox Bazar) to ensure that supply chains in less developed areas (e.g. Bandarban) develop in tandem with the industry's expansion.	NGO, Hotel/ Restaurant Association		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
	and a programme should be initiated into increase local tourism supplies (B2C) and tourist expenditure.	CD-05/E - Formation of Self-Help Groups (SHGs) at the community level and capacity building for their management of businesses and services connecting farm and non-farm based products to tourism supply chains, as well as ensuring their participation in decision-making	NGO, DAF		
CD-6: Develop the skills and human resources of the local tourism industry (SDG-4 Vision 2041- Strategy for Training and Skills Formation, Pg 60 NTP- 6.6 Pg 16)	A realistic and well-planned strategy for training and skill development is required, with an equal emphasis on skill and attitude development. These should be targeted at lodging providers, tour guides, and employees of tourist-oriented restaurants, with a particular emphasis on women.	CD-06/A - Develop and present short, practical training courses to local tourism providers in partnership with local training institutes, with a special effort to involve local women	BPC Institution's		
		CD-06/B - Developing the capacity and skills of ethnic peoples so that tourism can contribute to increased income sources, improved living standards, and the overall development of the region	LGI, CHT Board, BTB		
		CD-06/C - Identify local champions and experts. Train them as trainers to ensure long term sustainability and facilitate cross fertilisation between clusters.	LGI, CHT Board, BTB		
		CD-06/D - Sensitizing and raising awareness among local communities about the importance of co-managing tourism in their areas and capitalizing on it to the fullest extent possible.	BTB, ToAB, Hotel Associations		
CD-7: Establish & Empower the functional committees at local level (Vision 2041- Decentralization, Pg 20 NTP- 4.2 Pg 11)	According to stakeholder consultations, tourism committees should be established and supported at the local level in order to function effectively on behalf of community members and organizations.	CD-07/A - Establish sub-district / upazilla-level functional committees and consistently apply guidelines for good management and development of clusters.	UNO, LGI		
		CD-07/B - Establish a Destination Management Council within the cluster, comprised of representatives from district administrations, agencies, private tour operators, and locally elected officials, to oversee the destination's development and management.	BTB, DA, TOAB		
		CD-07/C - Facilitate meetings within each cluster to explore opportunities for sites to collaborate	BTB, DA, TOAB		
		CD-07/D - Develop and promote guidelines for the effective operation of each group, based on the principles of responsible tourism.	BTB, TOAB		
CD-8: Ensure the conservation and protection of the cluster's	The combination of higher elevation hills and river valleys creates a diverse and unique biome	CD-08/A - Support NGOs, and relevant government ministries in raising environmental awareness among tourism enterprises and stakeholder groups and encouraging sustainable environmental practices.	BTB, DoE, BELA		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
natural resources and biodiversity (SDG-4,7,9,11,12,14,15 Vision 2041 - Ensure Sustainable Management of Forestry Resources, Pg 205 BDP - Sub-strategy FW 1.6, Pg 19)	that is conducive to a variety of high-quality nature experiences. According to interviews and site evidence, the country's natural environment has been tragically neglected, and mass production and river pollution pose serious threats in some areas, such as Tahirpur Boat Station, where piles of plastic trash were found on the river's bank. Plastic waste in and around Ratargul Swamp Forest (Bangladesh's only freshwater forest) is posing a threat to the environment. Given its geographic location, the destination's future success will be determined by the environmental quality and sensitivity with which tourism facilities are developed.	CD-08/B - Conduct an audit of waste management practices and collaborate with local communities and authorities to improve waste management practices and technologies	LGI, NGO, Waste Concern		
		CD-08/C - Considering that Bangladesh's positioning and appeal are heavily reliant on its unique and authentic natural environment, sound environmental management practices (such as renewable energy technologies, water management practices, etc.) should be incorporated into tourism policies and legislation governing the region.	LGI NGO		
		CD-08/D - Promote green tourism business ideas to new and existing tourism clusters, particularly in the ECA, in order to instil environmental stewardship and sound business management.	BTB, DoE, DoF		
		CD-08/E - Creation of Eco Tourism Guidelines for the areas like Sundarbans, Ratargul Swamp Forest, Haor Region etc.	BTB, DoE, DoF		
		CD-08/F - Establish a levy on tourists entering the conservation zone in the form of a Green Tax/Tourism Tax/Sustainable Tax (existing & proposed clusters), which will be used to fund site management and development.	BTB, DoF		
CD-9: Improve quality of tourism attractions and experiences (SDG-6,11 BDP - Strategy FR 3, Pg 17)	To increase the destination's competitiveness, the quality and visitor readiness of commercial products (i.e. lodging, restaurants, entertainment, tours, etc.) and public attractions must be improved even in well-established tourist destinations such as Sunderbans, St Martin and others. Enhancements to product quality may include the implementation of a basic quality assurance system and a concerted effort to upgrade visitor facilities such as accessibility, restrooms, water, seating, signage, walkways, riverfront boat mooring, and visitor	CD-09/A - Create adequate visitor infrastructure that is climate resilient, environmentally friendly, and sustainable.	Concern Dept, RHD, LGED		
		CD-09/B - In consultation with local communities, develop detailed site development plans for major tourist destinations such as Kukata, Boga Lake, Jafalong, Tanguar Haor, Sunderbans, Alpona Village, Keokradong, and Shoilo propat. This set of documents should include plans for existing structures as well as new proposed developments. Environmental threats must also be considered.	BTB, BPC, TOAB, TEAB		
		CD-09/C - The implementation of a simple quality assurance system, which would involve providing businesses with a checklist of quality criteria relating to visitor comfort, safety, hygiene, and cleanliness, as well as a certificate of approval issued by the appropriate authority could be considered.	BSTI, BTB, BPC, Hotelier /Restaurant Associations		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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Key Strategy	Key Findings	Priority Actions	Institution(s)	*	**
	boarding facilities, which are currently insufficient to accommodate growing tourism numbers.				
CD-10: Increase the accuracy of visitor statistics and research. (Vision 2041- Emphasis on services exports:, Pg 102 NTP- Ch 2(xxiv), Pg 5)	Successful tourism development strategy necessitates an understanding of, and vigilance over, market trends and performance. While international visitors are accurately counted via entry permits, domestic tourists are not adequately accounted for, making it impossible to estimate the number and growth of tourists in Bangladesh. Without comprehensive statistics and research, it will be impossible to quantify the effects of tourism investment and its return.	CD-010/A - Work closely with the Tourist Police, BBIS and other relevant departments to obtain and track the numbers of both international and domestic visitors	TP, SB, Hotelier Association		
		CD-010/B - Conduct bi-annual short, random visitor surveys in summer and winter to obtain a picture of visitor demographics, activities, expenditure patterns, etc.	BTB, BPC Institutions		
		CD-010/C - Create an online dashboard to manage the arrivals data at BTB.	BTB		

Legend:

*Timeline	Short (0-3 Yr)	Medium (3-5 Yr)	Long (5-15 Yr)	**Importance	High	Medium	Long
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6 Annexure

Annexure I-A: Denmark: The promotional value of a happy investor

The Danish investment promotion agency, Invest in Denmark, uses satisfied investors as a promotional tool. The homepage of Invest in Denmark lists an array of statements from various international investors, which describe their reasons for investing in Denmark. Similar cases are used in the same way in the different brochures and promotional material that Invest in Denmark disseminates.

The emphasis is put on Denmark's factor endowments rather than on what the investment promotion agency has to offer. The different investors point to various advantages, such as location and infrastructure, market access, cluster advantages, work force and level of education.

Altogether, 36 investors have contributed their comments to the "why Denmark" section on the Web site. Existing investors are also invited to take part in seminars held by Invest in Denmark, which typically feature the presentation of case studies, which describe certain company experiences in locating and operating in Denmark.

Invest in Denmark is convinced that statements by investors constitute the best possible argument in favour of Denmark as an investment location. This was confirmed in a survey in which the existing investors were asked about their motives for investing in Denmark. Furthermore, Invest in Denmark emphasizes the importance of the bandwagon effect, whereby the potential investors are influenced by other companies' choices to invest there. Major industrial players - such as IBM in the information technology sector - or key Danish companies play an important role in convincing the investor of the favourable business environment.

Source: UNCTAD based on information provided by Invest in Denmark.

Annexure II

Table 2: Preferred Travel Time for a Cluster based on Google Algorithms

Road Design	Road Name	Distance	Hours	Speeds	Average
NH	Dhaka to Patuakhali NH	284	9	33	35
NH	Dhaka to Rangpur NH	297	8	38	
NH	Dhaka to Sylhet NH	243	6	41	
NH	Dhaka to Khulna NH	273	8	34	
NH	Dhaka to Mymensingh NH	114	4	29	
NH	Dhaka to Mawa NH	46	1	36	
RH	Amtali to Kuakata RH	40	1	40	31
RH	Barguna to Amtali RH	23	1	23	
RH	Patuakhali (Chowrasta) - Kakchira (Barguna)	60	3	24	
RH	Bhola (Paran Takukder Hat) - Char Manika	90	4	26	
RH	Barisal-Pirojpur Highway	52	2	26	
RH	Patiya - Eidmoni (Chakaria)	69	2	35	
RH	Jessore Satkhira	72	2	32	32
DR	Rajapur - Patharghata(Goal Chattar)	77	2	36	
DR	Charkhali(Bismillah Chattar) - Patharghata	57	2	33	
DR	Hajiganj(Ghonia) - Laxmipur(Bagmara)	38	1	33	
DR	Bakerganj - Barguna	58	2	29	
DR	Kurigram to Nageshwari	23	1	28	
DR	Vandaria - Kathalia road	16	1	27	
DR	Ullapara - Tarash Rd	34	1	42	
DR	Daudkandi Bridge - Matlab Uttar(Bhangarchar)	38	1	32	32
SDR	Sagordeghee-Sokhipur Road	13	0	33	
SDR	Saghata-paschim Kachua Road	378	11	34	
SDR	Gazipur Sadar to Sreepur	28	1	31	
SDR	Kaligonj - Jamalpur - taraganj Road	174	5	35	
SDR	Kalidah-Laskarhat Road	323	10	34	

SDR	Kalibari-Terki rd	111	4	31	
SDR	Kalia Chapail Rd	10	0	28	
SDR	Kalhati-Dewpara rd	15	0	34	

Annexure III – Prioritization of Clusters

Table 3: Parameters identified for prioritization of Cluster

Parameters	Sub Parameters	Weightage Index	
The Pull & Push Factor	Tourist Catchment	1.2	3
	Significance & Performance Evaluation	1.2	
	Differentiating/Unique Products	0.6	
Infrastructure Readiness	Transportation	1.2	3
	Accommodation Facility	0.9	
	Tourist Infrastructure	0.9	
Social Impact	Cultural Sensitivity	0.9	3
	Community Willingness	1.2	
	Safety & Security	0.9	
Economic Impact	Duration of Stay	0.8	2
	Seasonality	0.8	
	Livelihood	0.4	
Development Potential	Investors preference or Investment friendly Climate	1	2
	Land Availability	1	
Environmental Impact	Use of Renewable Energy Sources/Local construction materials	0.5	1
	State/Condition (Pollution levels and sensitivity - Anticipated Irreversible major impacts)	0.5	

Table 4: List of all sites under prioritized clusters

Cluster	Division	District	Name of the sites	Potential Theme
Bagerhat	Khulna	Bagerhat	Singair mosque	Archaeological and Historical Tourism
		Bagerhat	Shat gumbuj pond/ khanjalir dighi	Eco-Tourism
		Bagerhat	Bibi begana mosque	Archaeological and Historical Tourism
		Bagerhat	Nine Dome Mosque	Pilgrimage/Spiritual Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Bagerhat	Shaat Gombuj Mosque	Archaeological and Historical Tourism
		Bagerhat	Chandra Mahal Eco Park	Eco-Tourism
		Bagerhat	Shundorbon Resort and Picnic Corner	Adventure and Sports Tourism
		Bagerhat	Reza khuda mosque	Archaeological and Historical Tourism
		Bagerhat	Bagerhat musuem	Archaeological and Historical Tourism
		Bagerhat	Khan Jahan Ali Mazar Dighi	Eco-Tourism
Bandarban	Chattogram	Bandarban	Meghla Parjatan Complex	Eco-Tourism
		Bandarban	Sambu Prara/Tripura Para	Ethno Tourism
		Chattogram	Shil Bandha para	Ethno Tourism
		Bandarban	Nilachal	Eco-Tourism
		Bandarban	Milanchhari	Eco-Tourism
		Bandarban	Keplong Para	Ethno Tourism
Barisal	Barisal	Barishal	Trish Godown	Riverine Tourism
		Barishal	Padrishipur church	Pilgrimage/Spiritual Tourism
		Barishal	Oxford Mission Church	Pilgrimage/Spiritual Tourism
		Barishal	Bhatikhana Twin mosque	Pilgrimage/Spiritual Tourism
		Barishal	Girza Mahalla	Pilgrimage/Spiritual Tourism
		Barishal	Sher-e bangla A k Fazlul Haque's house	Archaeological and Historical Tourism
		Barishal	Mia Bari Jame Mosque	Archaeological and Historical Tourism
		Barishal	Bard Mukuanda Das's House	Pilgrimage/Spiritual Tourism
		Jhalokathi	Nesarabad Madrasa	Pilgrimage/Spiritual Tourism
		Jhalokathi	Kabi Jibonanondo Dad's Homestead.	Pilgrimage/Spiritual Tourism
Bogura	Rajshahi	Bogura	Babur pukur mass grave	Archaeological and Historical Tourism
		Bogura	Parshuram Palace	Archaeological and Historical Tourism
		Bogura	Soudia city park	Ethno Tourism
		Bogura	Bibir mosque	Pilgrimage/Spiritual Tourism
		Gaibandha	Bardhankuthi	Archaeological and Historical Tourism
		Bogura	Mohastangor museum	Pilgrimage/Spiritual Tourism
		Bogura	Gokul Medh(Behular Bashor Ghor)	Archaeological and Historical Tourism
		Bogura	Bihar Dhap	Archaeological and Historical Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Bogura	Hazeat Shah Sultan Mahmud	Archaeological and Historical Tourism
			Bolkhi Mahiswar Mazar	
		Bogura	Mankali	Archaeological and Historical Tourism
		Bogura	Mohastan Gor(Jahazghata)	Archaeological and Historical Tourism
		Bogura	Pachpir mazar	Eco-Tourism
		Bogura	Boiragir Vita	Archaeological and Historical Tourism
		Joypurhat	Nandail dighi	Rural Tourism
		Bogura	Tamra Duyar	Pilgrimage/Spiritual Tourism
Chittagong	Chattogram	Chattogram	Chittagong Court Building	Archaeological and Historical Tourism
		Chattogram	Ethnological Museum	Archaeological and Historical Tourism
		Chattogram	Naval Sea beach and port	Beach Tourism
		Chattogram	Bhatiari Lake	Eco-Tourism
		Chattogram	Chandanpura Mosque	Pilgrimage/Spiritual Tourism
		Chattogram	Kumira Jheti Ghat	Riverine Tourism
		Chattogram	Majar of Hajrat shah Amanat Khan (R)	Pilgrimage/Spiritual Tourism
		Chattogram	Patenga Sea Beach	Beach Tourism
		Chattogram	Sripur Bura Mosque	Pilgrimage/Spiritual Tourism
		Chattogram	Andarkilla Shahi Jam E Mosque	Pilgrimage/Spiritual Tourism
		Chattogram	Hilltop Park	Eco-Tourism
		Chattogram	Kalachand Thakur Bari	Pilgrimage/Spiritual Tourism
		Chattogram	Bashbaria Sea Beach	Beach Tourism
		Chattogram	Foys Lake	Eco-Tourism
		Chattogram	Bottoli Sharbojonin jetobon bihara	Pilgrimage/Spiritual Tourism
		Chattogram	Parki Sea Beach	Beach Tourism
Comilla	Chattogram	Cumilla	Chandimura mandir	Pilgrimage/Spiritual Tourism
		Cumilla	Elahabad Central Mosque	Pilgrimage/Spiritual Tourism
		Cumilla	Itakhola mura	Archaeological and Historical Tourism
		Cumilla	Lotikot mura	Archaeological and Historical Tourism
		Cumilla	Nawab fayzunnesa's house	Archaeological and Historical Tourism
		Cumilla	Comilla club	MICE Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Cumilla	Rajeshpur eco park	Eco-Tourism
		Cumilla	Shahid Minar	Archaeological and Historical Tourism
		Cumilla	Sri Sri Rashastholi Temple	Pilgrimage/Spiritual Tourism
		Cumilla	Comilla town hall	MICE Tourism
		Brahmanbaria	Kallapathor Martyr-Burial Ground	Archaeological and Historical Tourism
		Cumilla	Khadi Bazar, Moynamoti Canton	Ethno Tourism
		Cumilla	Dharmasagar dighi	Riverine Tourism
		Cumilla	Nanuwa Dighi	Cruise Tourism
		Cumilla	Ranir Dighi	Riverine Tourism
		Cumilla	Lalmai Forest	Eco-Tourism
		Cumilla	Shah suja mosque	Pilgrimage/Spiritual Tourism
		Cumilla	Utkhara Shirine	Pilgrimage/Spiritual Tourism
		Cumilla	Chotra Koloni Jame Mosque	Pilgrimage/Spiritual Tourism
		Cumilla	Rani Moynamotir Palace	Archaeological and Historical Tourism
		Cumilla	BARD(Bangladesh Academy for rural Developmen)	MICE Tourism
Cox's Bazar	Chattogram	Cox's Bazar	Himchari National Park	Eco-Tourism
		Cox's Bazar	Laboni Beach Point Cox's Bazar Sea Beach	Beach Tourism
		Cox's Bazar	Sri Sri Ramkut Tirthodham	Pilgrimage/Spiritual Tourism
		Cox's Bazar	Ukhia Central Ananda Bhaban Buddha Vihara	Pilgrimage/Spiritual Tourism
		Chattogram	Ramu Rubber Garden	Eco-Tourism
		Cox's Bazar	Adinath Temple	Pilgrimage/Spiritual Tourism
		Cox's Bazar	Mohasingdogri	Pilgrimage/Spiritual Tourism
		Cox's Bazar	Moheshkhali Adinath Jeti	Eco-Tourism
		Cox's Bazar	Inani Sea Beach	Beach Tourism
		Cox's Bazar	Patuartek Beach	Beach Tourism
		Cox's Bazar	Rangkut Buddha Vihara	Pilgrimage/Spiritual Tourism
Dhaka	Dhaka	Dhaka	Bangladesh National Parliament	Archaeological and Historical Tourism
		Dhaka	Dhakeswari Temple	Pilgrimage/Spiritual Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Dhaka	Dhaka Cristhian Cementry	Archaeological and Historical Tourism
		Dhaka	Ruplal House	Archaeological and Historical Tourism
		Dhaka	National Botanical Garden	Eco-Tourism
		Dhaka	Aparajeyo Bangla	Archaeological and Historical Tourism
		Dhaka	Joy kali Temple	Pilgrimage/Spiritual Tourism
		Dhaka	SAARC Foara	Other
		Dhaka	Bahadur Shah park/Victoria park	Archaeological and Historical Tourism
		Dhaka	Choto katra	Archaeological and Historical Tourism
		Dhaka	Dhanmondi Eidgah Math	Pilgrimage/Spiritual Tourism
		Dhaka	Guruduari nanok shahi mondir	Pilgrimage/Spiritual Tourism
		Dhaka	Hazi Khwaja Shahbaj Mosque	Pilgrimage/Spiritual Tourism
		Dhaka	Rayer Bazar Boddho Bhumi	Archaeological and Historical Tourism
		Dhaka	Tara Mosque	Pilgrimage/Spiritual Tourism
		Dhaka	Bangla Academy Library	Other
		Dhaka	Hatirjheel	Eco-Tourism
		Dhaka	Zinzira Palace	Archaeological and Historical Tourism
		Dhaka	Bangabandhu Square monument.	Archaeological and Historical Tourism
		Dhaka	Dhanmondi Lake	Eco-Tourism
		Dhaka	chokbazar Shashi Jame Mosque / Boro Katra	Archaeological and Historical Tourism
		Dhaka	Bangabandhu Military Museum	Archaeological and Historical Tourism
		Dhaka	Dhaka Mohanagar Natto Moncho	MICE Tourism
		Dhaka	Azimpur Graveyard shahi Mosque	Pilgrimage/Spiritual Tourism
		Dhaka	Buddhijibi Shahid Minar	Archaeological and Historical Tourism
		Dhaka	Bangabandhu National Stadium	Adventure and Sports Tourism
		Dhaka	SadarGhat Launch Terminal	Riverine Tourism
		Dhaka	Musa khan Mosque	Pilgrimage/Spiritual Tourism
		Dhaka	Bhuiyapara Jame Mosque	Pilgrimage/Spiritual Tourism
		Dhaka	Tin Netar mazar	Archaeological and Historical Tourism
Jaflong	Sylhet	Sylhet	Shapla beel (dibir haor)	Eco-Tourism
		Sylhet	Jointa Rajar Bari	Archaeological and Historical Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Sylhet	Bichnakandi	Eco-Tourism
		Sylhet	Jaflong	Riverine Tourism
Khagrachhari	Chattogram	Khagrachhari	Risang waterfall	Eco-Tourism
		Khagrachhari	Khagrachari Horticultural Park	Eco-Tourism
		Khagrachari	Mayung Kopal	Ethno Tourism
		Chattogram	alutila cave	Eco-Tourism
Khulna	Khulna	Khulna	Gollamari Monument	Archaeological and Historical Tourism
		Khulna	Seikh Rasel Eco park,Khulna	Eco-Tourism
		Khulna	Rana Resort & Amusement Park	Adventure and Sports Tourism
		Khulna	Adamma Bangla Monument	Archaeological and Historical Tourism
		Khulna	Rabindra Complex	Archaeological and Historical Tourism
		Jashore	11 Shiv Temple complex	Archaeological and Historical Tourism
		Kushtia	Jhaudia Shahi Masjid	Archaeological and Historical Tourism
		Kushtia	Tagore Lodge	Archaeological and Historical Tourism
Mymensingh	Mymensingh	Kushtia	Rabindranath Tagore's Shilaidaha Kuthibari	Archaeological and Historical Tourism
		Mymensingh	Alexander Castle	Archaeological and Historical Tourism
		Mymensingh	Darirampur, Trishal,Reminiscent of National Poet Kazi Nazrul Islam	Eco-Tourism
		Mymensingh	Botanical garden	Eco-Tourism
		Mymensingh	Muktagachha palace	Pilgrimage/Spiritual Tourism
Rajshahi	Rajshahi	Mymensingh	Shashi Lodge	Pilgrimage/Spiritual Tourism
		Rajshahi	Kismat Mariya Mosque	Eco-Tourism
		Rajshahi	Hazrat Shah Makhdum Ruposh(R.) Shrine	Archaeological and Historical Tourism
		Rajshahi	Kala Chand Shah Mazar	Pilgrimage/Spiritual Tourism
		Rajshahi	PanchuBari Central Mosque	Pilgrimage/Spiritual Tourism
		Rajshahi	Ratha bagicha or Hawakhana	Other
Rangamati	Chattogram	Rajshahi	Padma Garden	Riverine Tourism
		Rangamati	Kaptail Lake	Eco-Tourism
		Chattogram	Karnaphuli Paper mills	Ethno Tourism
		Rangamati	Kaptai National Park (Proshanti Park)	Eco-Tourism
		Rangamati	Furomon Hill	Eco-Tourism

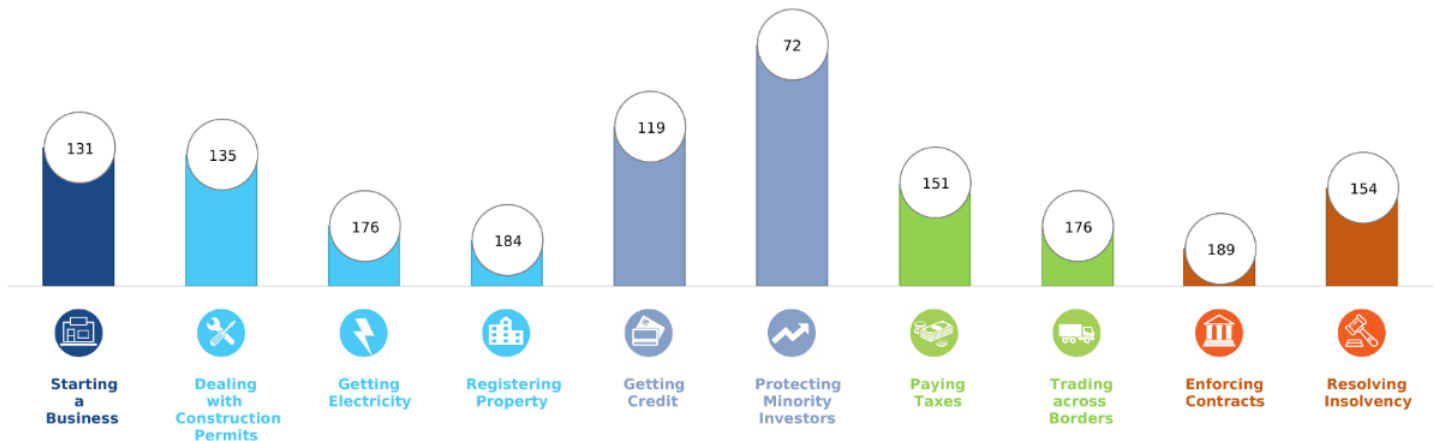
Cluster	Division	District	Name of the sites	Potential Theme
		Rangamati	Banashree Parjatan Complex	Eco-Tourism
		Rangamati	Chakma Rajbari	Archaeological and Historical Tourism
		Rangamati	Panorama Jum Restaurant and Picnic Spot	Eco-Tourism
		Rangamati	Lake View Island	Eco-Tourism
		Rangamati	Shuvolong Falls	Eco-Tourism
		Rangamati	Rajban Vihara	Pilgrimage/Spiritual Tourism
Rangpur	Rangpur & Khulna	Rangpur	Hazrat shah ismail gazi dargah	Pilgrimage/Spiritual Tourism
		Rangpur	Collectorate Surabhi Udyan	Eco-Tourism
		Rangpur	Karamatia Mosque and Mazar	Pilgrimage/Spiritual Tourism
		Lalmonirhat	Shree shree vobotarini Kali Mandir	Pilgrimage/Spiritual Tourism
		Rangpur	Begum Rokeya memorial and paternal home	Archaeological and Historical Tourism
		Rangpur	Mithapukur mosque	Archaeological and Historical Tourism
		Satkhira	Puraton Mayer barir mondir	Archaeological and Historical Tourism
		Narail	Jomidar bhari	Archaeological and Historical Tourism
		Satkhira	Lake view cafe and restaurant	Adventure and Sports Tourism
		Satkhira	Mojaffar garden and picnic spot	Adventure and Sports Tourism
Sreemangal	Sylhet	Moulvibazar	Tripura Rajar Kachari Bari	Archaeological and Historical Tourism
		Moulvibazar	Baikka bell	Eco-Tourism
		Moulvibazar	Madhavkundu eco-park	Eco-Tourism
		Moulvibazar	Madhabpur lake	Eco-Tourism
		Moulvibazar	Adi nilkantha tea cabin	Rural Tourism
		Moulvibazar	Lasubon canyon	Eco-Tourism
		Moulvibazar	Sreemangal Tea Resort and Museum	Archaeological and Historical Tourism
		Moulvibazar	Boddhovumi 71	Eco-Tourism
		Moulvibazar	Lawachara national park	Eco-Tourism
Sundarban	Khulna	Satkhira	Goyailbhari jele para	Eco-Tourism
		Satkhira	Ishwaripur Hammam Khana	Archaeological and Historical Tourism
		Satkhira	Jeshoreshwari Kali Temple	Archaeological and Historical Tourism
		Bagerhat	Jamtala Sea Beach Katka	Beach Tourism
		Satkhira	Prabajpur Shahi Jame Mosque	Archaeological and Historical Tourism

Cluster	Division	District	Name of the sites	Potential Theme
		Satkhira	Tenga Ishwaripur Mosque	Archaeological and Historical Tourism
		Bagerhat	Harbaria Sundarban Eco-Tourism Center	Eco-Tourism
		Khulna	Dublar char	Rural Tourism
		Satkhira	Prabajpur Shahi Jame Mosque	Archaeological and Historical Tourism
		Satkhira	Kolagaciya eco tourism	Eco-Tourism
		Satkhira	Akash nila eco tourism center	Eco-Tourism
		Khulna	Karamjol	Eco-Tourism
		Khulna	Kali Char	Eco-Tourism
		Bagerhat	Trivuj Chor	Eco-Tourism
		Bagerhat	Tiar Chor	Eco-Tourism
		Bagerhat	Katka Beach	Beach Tourism
		Bagerhat	Dimer Char	Beach Tourism
		Bagerhat	Kochikhali Sea Beach	Beach Tourism
		Satkhira	Dobeki Forest Camp	Eco-Tourism
		Bagerhat	Dhoenchabaria Island	Beach Tourism
		Khulna	Kalabogu Dacope	Eco-Tourism
Sylhet	Sylhet	Sylhet	Hazrat Shahjalal Mazar sharif	Pilgrimage/Spiritual Tourism
		Sylhet	Malnicherra tea estate	Eco-Tourism
		Sylhet	Bais thilla	Eco-Tourism
		Sylhet	Sylhet Nagri Script	Archaeological and Historical Tourism
		Sylhet	Osmani Museum	Archaeological and Historical Tourism
		Sylhet	Lakatura tea garden	Eco-Tourism
		Sylhet	Museum of rajas	Archaeological and Historical Tourism
Tangaur Haor	Sylhet	Sunamganj	Shimul Bagan	Eco-Tourism
		Sunamganj	Shohid shiraz lake	Eco-Tourism
		Sunamganj	Tangaur Haor and its catchment	Eco-Tourism
Teknaf	Chattogram	Cox's Bazar	Shah Pari Island	Beach Tourism
		Cox's Bazar	Oceanic Scuba Diving Center	Adventure and Sports Tourism
		Cox's Bazar	Teknaf beach	Beach Tourism
		Cox's Bazar	Naf River	Cruise Tourism

<i>Cluster</i>	<i>Division</i>	<i>District</i>	<i>Name of the sites</i>	<i>Potential Theme</i>
Thanchi	Chattogram	Bandarban	Naikkhongmukh	Adventure and Sports Tourism
		Bandarban	Maya Lake	Eco-Tourism
		Bandarban	Boro Pathor	Adventure and Sports Tourism
		Bandarban	Nicolas Para	Ethno Tourism
		Bandarban	Shatbhai khum	Adventure and Sports Tourism
		Bandarban	Dim Pahar	Eco-Tourism
		Bandarban	Baktali Waterfall	Adventure and Sports Tourism
		Bandarban	Cryxyong Fountain	Adventure and Sports Tourism
		Bandarban	Simtalaming Para	Ethno Tourism
		Bandarban	Nafakhum Waterfall	Adventure and Sports Tourism

Annexure IV: Ease of Doing Business Metrics: Bangladesh

Rankings on Doing Business topics - Bangladesh



Topic Scores



✓ Starting a Business (rank)	131	✓ Getting Credit (rank)	119	Trading across Borders (rank)	176
Score of starting a business (0-100)	82.4	Score of getting credit (0-100)	45.0	Score of trading across borders (0-100)	31.8
Procedures (number)	9	Strength of legal rights index (0-12)	5	<i>Time to export</i>	
Time (days)	19.5	Depth of credit information index (0-8)	4	Documentary compliance (hours)	147
Cost (number)	8.7	Credit registry coverage (% of adults)	5.2	Border compliance (hours)	168
Paid-in min. capital (% of income per capita)	0.0	Credit bureau coverage (% of adults)	0.0	<i>Cost to export</i>	
				Documentary compliance (USD)	225
Dealing with Construction Permits (rank)	135	Protecting Minority Investors (rank)	72	Border compliance (USD)	408
Score of dealing with construction permits (0-100)	61.1	Score of protecting minority investors (0-100)	60.0	<i>Time to export</i>	
Procedures (number)	16	Extent of disclosure index (0-10)	6.0	Documentary compliance (hours)	144
Time (days)	274	Extent of director liability index (0-10)	7.0	Border compliance (hours)	216
Cost (% of warehouse value)	1.6	Ease of shareholder suits index (0-10)	7.0	<i>Cost to export</i>	
Building quality control index (0-15)	10.0	Extent of shareholder rights index (0-6)	4.0	Documentary compliance (USD)	370
		Extent of ownership and control index (0-7)	3.0	Border compliance (USD)	900
		Extent of corporate transparency index (0-7)	3.0		
✓ Getting Electricity (rank)	176	Paying Taxes (rank)	151	Enforcing Contracts (rank)	189
Score of getting electricity (0-100)	34.9	Score of paying taxes (0-100)	56.1	Score of enforcing contracts (0-100)	22.2
Procedures (number)	9	Payments (number per year)	33	Time (days)	1,442
Time (days)	125	Time (hours per year)	435	Cost (% of claim value)	66.8
Cost (% of income per capita)	1,745.8	Total tax and contribution rate (% of profit)	33.4	Quality of judicial processes index (0-18)	7.5
Reliability of supply and transparency of tariff index (0-8)	0	Postfiling index (0-100)	44.4		
Registering Property (rank)	184			Resolving Insolvency (rank)	154
Score of registering property (0-100)	29.0			Score of resolving insolvency (0-100)	28.1
Procedures (number)	8			Recovery rate (cents on the dollar)	29.1
Time (days)	271			Time (years)	4.0
Cost (% of property value)	7.1			Cost (% of estate)	8.0
Quality of the land administration index (0-30)	6.5			Outcome (0 as piecemeal sale and 1 as going concern)	0
				Strength of insolvency framework index (0-16)	4.0

Annexure V: Tourism Masterplan of Thailand, 2016

Promote a culture of domestic tourism "Thais travel in Thailand" through increasing attractiveness of domestic tourism and tailored sales mechanism such as tax-reduction scheme

Objective

This initiative aims to encourage locals to travel within Thailand by organizing events of their interest and providing incentives for domestic tourism.

Rationale

Number of domestic trips per capita in Thailand is equal to global average but is still much lower than regional leaders such as China, South Korea, and Japan. Traveling abroad is still viewed as more prestigious option than domestic travelling among middle-class and high-income Thais and low-income earners are unable to afford to spend much on leisure travelling. A development of domestic tourism is needed to create balance and increase resilient of Thailand, tourism

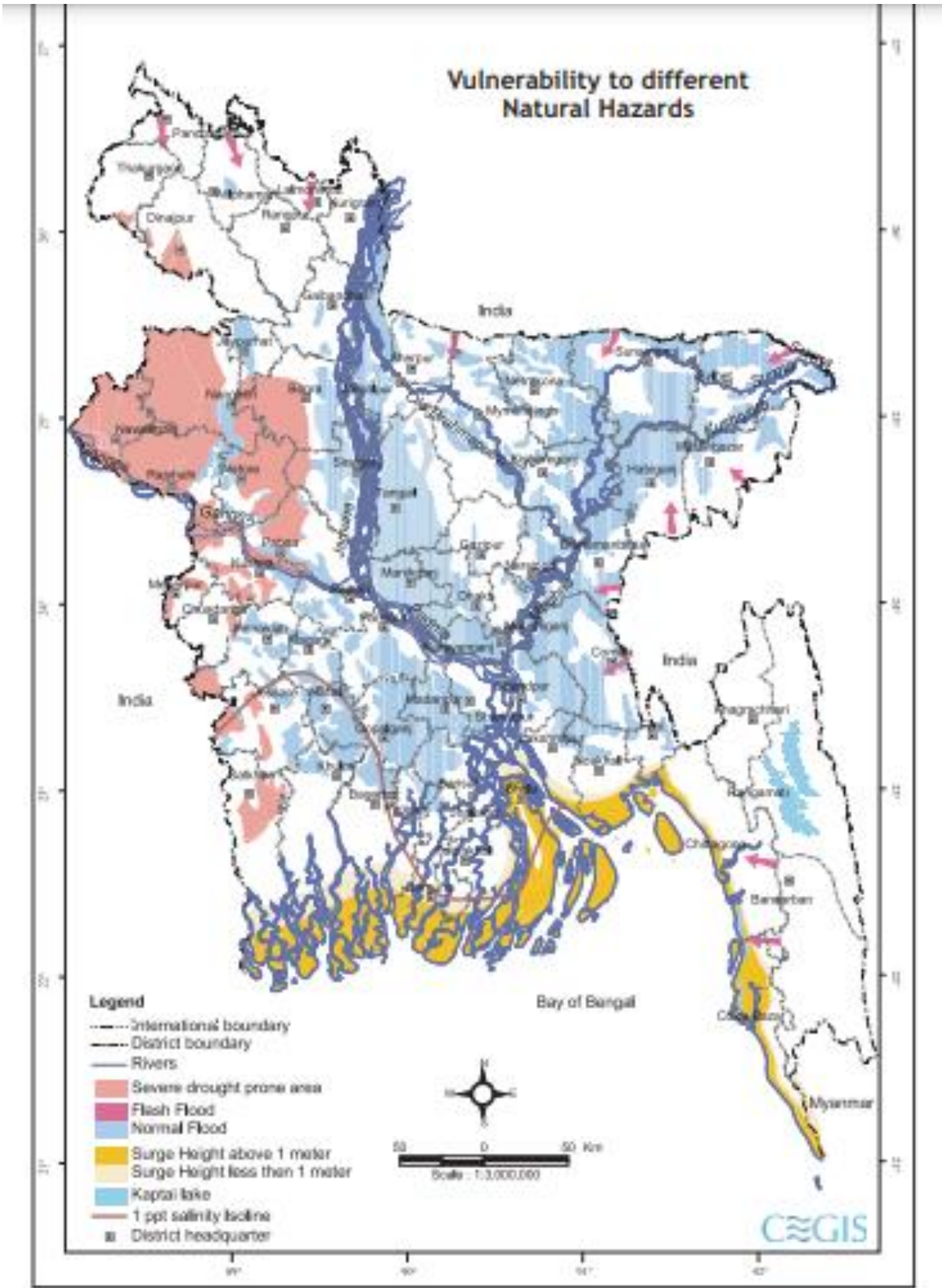
Recommended Actions

The quick-win is to increase the attractiveness and perception of domestic holidays. One of the ways is to utilize buzz media to create attractiveness for domestic tourism, such as creative campaigns with comparable scenery from local vs. international destination, TV series, reality shows. There are several internationally renowned attractions in Thailand, such as UNESCO World heritage sites that can be improved to Appeal to domestic holidays. In addition most of Thai travelers are not aware of the high-end tourism offerings in Thailand. Therefore, the effort to promote high-end offerings that are currently targeting foreigners is recommended. Promotional packages for specific types of domestic tourists, for instance, 'Elders honeymooners', 'Experiential volunteers', 'School break family get-together, and 'Wonderful weekdays vacations should be developed and promoted. Hosting variety of events and festivals in different parts of the country can help create diversity and options for domestic tourists and encourage repeat visits, such as music festivals and marathon events.

Another effective way to induce domestic tourism is through the offering of incentives for domestic travel. The government has recently devised tax incentive to boost domestic tourism and has seen positive result. Tax rebates for spending on domestic tourism products such as flights and accommodation should be continue. Other discounts such as waive of toll fees on expressway, free entry to attractions in certain places or at certain times can also help motivate and encourage domestic tourism. Subsidy for transportation for the lower income travelers are advised to support the growth of domestic tourism. Furthermore, tax incentive should also be given to other tourism segments, such as MICE by granting tax incentives for corporate hosting MICE activity in Thailand.

Lastly, Thailand should allow for more flexible work schedule to create more opportunities for domestic travels precisely, the government should encourage paid holidays to be on Mondays and Fridays to increase the number of short trips. Flexible work week will also allow for more weekdays traveling. Finally, the government should be the key to encourage corporates to allow their employees to use the vacation quota.

Annexure VI



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