



CONFERENCE
"Asia-Pacific: e-Tourism for Growth /
Matching Market Efficiency and Social Inclusion"

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FINAL REPORT

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Introduction

1. Tourism is one of the leading services for trade in many developing countries. It is among the highest producers of foreign exchange and accounting for a growing part of the GDP. Information and Communication Technologies (ICT), especially the Internet, have substantially changed the playing field for tourism stakeholders, providing new challenges and opportunities. The Asia-Pacific region experiences the highest growth in Internet use and a continuous increase in international tourist arrivals. ICT could serve as the bridge between Asian tourism stakeholders and the global tourism market, being therefore a key factor of economic development. In order to give a significant input to the development of e-tourism in the Asia-Pacific region, UNCTAD held the "**Asia-Pacific: e-Tourism for Growth / Matching Market Efficiency and Social Inclusion**" conference.

2. The conference took place at the Sutera Harbour Resort in Kota Kinabalu, State of Sabah, Malaysia, on 13 and 14 March 2007. Two workshops were organized on the first day for the benefit of tourism stakeholders at the political and operational levels. On the second and last day, the programme continued with a high-level welcoming ceremony chaired by Dr. Supachai Panitchpakdi, Secretary-General of UNCTAD, followed by specialized panels on various tourism themes: **ICT - its impact and role on tourism; ICT for sustainable tourism; ICT for tourism SMEs; a partnership-building approach; e-Marketing and tourism.**

3. The event was attended by delegates coming from 22 countries / territories of the sub-region, namely: Australia, Bhutan, Cambodia, Fiji Islands, Guam, Hong-Kong, India, Indonesia, Japan, Kazakhstan, Macau, Malaysia, Maldives, Mongolia, Nepal, Philippines, Singapore, Solomon Islands, Sri Lanka, Thailand, Tonga, and Vietnam. International and regional organizations, as well as international cooperation agencies committed to the development of ICT for tourism in Asia-Pacific were represented: UNCTAD, UNESCAP, ADB, UNDP, UNWTO, and GTZ, thereby increasing the total number of participating countries and territories to 28.

4. The purpose of the conference was to promote e-tourism as a tool for sustainable development in Asia-Pacific. It aimed at providing knowledge and raising awareness on the opportunities offered by e-tourism to tourism stakeholders.

5. The organization of the conference benefited of the cooperation of the Ministry of Tourism of Malaysia, the Sabah Ministry of Tourism and the Sabah Tourism Board. In addition, financial support was provided by GTZ and the Yayasan Sabah Group.

6. This report focuses on the various key issues that were presented throughout the two-days event and the exchange of discussions among participants on substantive issues. It consists of three parts, followed by the annexes to the conference:

Part I: Workshops A (e-Marketing and e-Payments) and B (Innovation and Knowledge Management)

Part II: Conference - opening statements and panels presentations

Part III: Closing remarks

Annexes

The views expressed are those of the author(s) and do not necessarily reflect those of the United Nations.

Part I: Workshops A (e-Marketing and e-Payments) and B (Innovation and Knowledge Management)

7. The workshops were designed to provide participants with presentations on specific topics made by experts. The presence of practitioners at senior and operational levels from Ministries, National Tourism Authorities and tourism businesses allowed the workshops to create useful interactions during the questions and answers sessions following each track.

A. Workshop A: e-Marketing and e-Payments

1. A1: e-Marketing

8. The main objectives of the session were to define e-marketing; to set up the principal bases of efficient e-marketing strategies and to present successful examples of ICT-based marketing. Forty people participated originating from 12 countries.

9. The first presentation was made by the University of Western Australia Business School, on the main principles of domain names and e-branding strategies. In today's world and its online environment, including the challenges of search engine listings, brands have gained a new importance. Therefore domain names and e-branding strategies must be reconsidered and converted into simple but proactive models. The foundations for such strategies must rely on strong ideas: names have to be short, memorable and easy to type. E-mails and website domains have to match with each other and have to be clear. Therefore, participants were advised to analyze their own branding strategies and to implement proactive methods. In addition, emphasis was put on two models, namely the renting versus the owning of brand and domain names.

10. Reference was then made by the Ministry to the main components of any good marketing strategy: the promotion of the destination and tourist information - both in the country and prior to the planned travel. These two components were integrated into the e-strategy that the Ministry implemented in the year 2001. From this date, the Ministry has privileged e-ways of marketing the destination. Such a decision was based on certified studies on the behavior of consumers. Nowadays, 80% of Internet users plan their holidays online, and the influence of Consumer to Consumer (C2C) and user-generated content is growing fast. Therefore, the Ministry implemented various e-marketing actions: web banners, search engines marketing, advertorials, newsletters etc. However, the Ministry's strategy does not only consist of the website "Bonjour Québec". It also consists of a Destination Management System (DMS), launched thanks to a Public Private Partnership with the company Bell in Canada. Currently, the Bonjour Québec website is being prepared to move to the web 2.0 that will allow new web applications. For instance users can be the owner of their own content and social networks can be created based on collaborative content management. The web 2.0 is a challenging opportunity for e-marketing encompassing a number of issues tourism stakeholders will have to face. The Ministry introduced a number of them.

11. Several participants highlighted the difficulties to set up simple and proactive e-strategies for the marketing of their destinations, both at the domain name level as well as at the website content level. Ways to better select domain names and the coming of new Internet suffixes such as .travel or .info were discussed, as well as the value of common e-strategies such as mass mailing lists. The participants' concerns related to website management turned around adapting their portals to several target markets (translating the content and changing the graphical chart in order to match with the culture, values and expectations of their audience) and calculating a financial plan for an efficient e-marketing strategy compared to overall marketing strategy. As an example, the Ministry of Tourism of Quebec spends 10% of its marketing budget on the web strategy.

2. A2: e-Payments

12. The second track of workshop A focused on a technical and business approach of the theme of e-payments, without which there is no e-commerce. The links between e-payments and tourism, their impact on the competitiveness of a destination and the design of an adequate business model in order

to implement an e-payment system were some of the main objectives of the session which was attended by 29 participants from 9 countries.

13. The multinational VISA International presented its vision of e-payments applied to tourism. With the continuous growth of e-commerce, including in the Asia-Pacific region, significant opportunities are opened to address and enhance the full potential of the Internet and to move to an e-payment environment. A good sign is thereby the increase in the online use of credit cards. However, there is a call for matching the requirements of industry payments with consumers' needs and concerns. The main preoccupation is certainly security, an issue that tourism stakeholders have to tackle.

14. This problem was raised by several participants; it is indeed the main obstacle to a massive move by tourism stakeholders to online payment environments. The difficulty to find cost-effective e-payment systems that allow transparent and secure transactions between tourists from abroad - sometimes from other continents - and local large or small-scale tourism actors is a constant problem for tourism businesses. Online fraud is a shared threat by countries with highly developed e-commerce applications and those with less-advanced applications.

B. Workshop B: Innovation and Knowledge Management

1. B1: Innovation - new business models

15. About 30 participants from 10 countries attended this session that focused on the importance of innovation in the tourism processes and its impact on related organizational configurations. Corresponding strategic re-positioning strategies need to be designed carefully and have to be built on the human capital as a driver.

16. The University of Quebec at Montreal in Canada underlined the main reasons why human resources have to be integrated as a key factor for innovation. New market forces appeared in the last few years having three main implications: the "consumers' empowerment"; the increase in the number of tourism stakeholders and the sustainable values of tourism. Based on these observations, and taking into account the four components characterizing the quality of the tourism experience for consumers (expected / desired / delivered / perceived - quality), tourism stakeholders have to think of a suitable model for a new strategy whereby innovation should be included as a main driver. An innovation-driven strategy should not only cover training programmes for tourism employees at all levels, but should also develop a culture of excellence and to meet sustainable development objectives while increasing competitiveness and quality. The example of the Centre of Excellence for Destinations (CED) is interesting. It aims at developing a culture of innovation among destinations, based on a public private partnership. Another example is the model of geotourism, which basically aims at enhancing the geographical character of a place: environment, culture, aesthetics, heritage and well being of residents. Such a model can be easily set up and could be suitable for many Asia-Pacific destinations.

2. B2: Knowledge Management

17. The United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP), and the APETIT network (Asia-Pacific Education and Training Institutes in Tourism) emphasized the importance of knowledge management in terms of knowledge and information dissemination. Some ways and methods were presented to implement knowledge management strategies in an efficient manner. A concrete example on how knowledge management can support specific themes was put forward, including the topic of pro-poor tourism. Approximately 30 people from 13 countries attended the session.

18. According to UNESCAP, Asia-Pacific shows the highest raise in tourism figures compared to other regions, thereby offering a high potential. The quality of the services provided is however a major issue. In order to increase the quality, human capital has to be taken into account, in particular in areas of training and adaptation to ICT-based innovation. As a matter of fact, ICT is also a highly efficient tool for capacity building and education that need to be extensively used in knowledge / information collection and dissemination. UNESCAP decided to address these challenges by launching APETIT in 1997, a network that at present consists of 238 members in 43 countries, among which Vietnam, China, Thailand and India. APETIT offers an interesting model of knowledge

dissemination via the cooperation between tourism pedagogical structures: for each identified theme, two structures in different countries are nominated as focal points. Every tourism-related subject can be the topic for a member-to-member training: food, revenue management, MICE (Meetings, Incentives, Conventions and Exhibitions), tourism development, etc... Furthermore, APETIT is an open network that has developed regional projects with international and regional organizations. Even though the network is a model of efficient knowledge management through advisory services, training programmes and seminars, it cannot deal efficiently with all the major ICT-related issues in the sub-region, such as the digital divide between and within countries. The efforts made by APETIT in the tourism sector need to be consolidated by a deeper commitment at the political level, in order to harness the unprecedented opportunities created by ICT.

19. Focus was then put on how knowledge management can play a role in implementing pro-poor tourism strategies. Knowledge is not static; it implies cognitive capabilities and methods to manage it. Basically, knowledge management refers to practices that allow the identification, creation, representation and the distribution of knowledge. Knowledge management is present everywhere. For instance, it refers to the work of data collection, analysis and evaluation necessary to set up relevant policies within the framework of pro-poor tourism. Therefore, when focusing on "unlocking opportunities for the poor", knowledge management can be used in 3 key areas: capacity building, last mile connectivity and sustainability. APETIT took the lead in the crosscutting theme of knowledge management in pro-poor tourism by launching its Tourism Open Educational Resources (TOER) that addresses the capacity-building issue. Based on Free and Open Source Software (FOSS) and on low cost last mile connectivity, TOER aim at providing a community of users educational resource for consultation, use and adaptation. The purpose of TOER - which is shared by e-tourism - is to serve as an instrumental tool in social inclusion for economically disadvantaged geographies. It can be considered as one of the most important activities in ICT4D (ICT for Development). Integrating this theme in the pro-poor tourism value chain (NGOs, donors / investors, DMOs (Destination Management Organizations) and international/regional organizations) can help these disadvantaged geographies to gain a new role on the tourism market.

Part II: Conference - opening statements and panels presentations

20. Following the operational workshops carried out on Day 1, the plenary sessions on Day 2 focused on the main policy issues to convert e-tourism into an effective and concrete tool to improve tourism economies of developing destination countries.

A. Opening of the high-level session

21. Under the patronage of Dr. Supachai Panitchpakdi, the Secretary General of UNCTAD, the ceremony was opened by Datuk Dr. Victor Wee, Secretary General of the Ministry of Tourism of Malaysia; H.E. Mr. Ishaq Khan Khakwani, Minister of Information Technology and Telecom of Pakistan; H.E. Dr. Kim Hak-Su, Executive Secretary of UNESAP and Y.B. Tan Sri Datuk Chong Kah Kiat, Deputy Chief Minister and Minister of Tourism, Culture and Environment of the State of Sabah of Malaysia.

22. Dr. Supachai Panitchpakdi opened the official part of the conference by expressing the great honor and pleasure for UNCTAD to organize such an event jointly with the government of Malaysia and the State of Sabah in Malaysia. According to the Secretary General, the tourism sector offers a number of benefits such as job creation and economic diversification and it is a stimulus for entrepreneurship and the development of infrastructures. Trends in international tourism are now in favor of developing countries, which attracted 34.5 %¹ arrivals in 2004. One of the drivers of this increase is the technology revolution. There is no doubt that the use of ICT in tourism, the so-called e-tourism, has played an important role in this regard, particularly in Asia-Pacific. For instance, a Cambodian hotel was making 70% of its revenues online in 2005. E-tourism is therefore a tool that can help bypassing a number of obstacles linked with traditional tourism and tackle market dominance. However, there are still some challenges that Asian developing destinations need to face. Major

¹ All figures and programmes mentioned in this report refer to the speakers' presentations (available on <http://etourism.unctad.org>) and are not UNCTAD official records. For more information on sources, please consult the presentations.

improvements in the connectivity level (broadband, wireless, etc.) have allowed the use of new e-marketing tools, however the costs of the creation and maintenance of destination websites are often too high. There is a tremendous need for telecom infrastructure and skilled workforce; but the most important that remains is the one for coordination and partnerships between public and private sectors. Such alliances will help keeping in touch with rapid Information Technology (IT) changes. Also, they will enable the implementation of efficient IT tools, including a Destination Management System (DMS) that requires a platform of financial, regulatory and administrative skills. Hence the main challenge would be to build human capacity at the regional and local level, and this is precisely what UNCTAD intends to do with its e-Tourism Initiative programme that was launched in 2004. Basically, the Initiative seeks to encourage destinations to take ownership of their brands and products, including key side assets (arts, crafts, culture, etc.). In order to help developing countries to become more and more self-sufficient, the e-Tourism Initiative develops training material, aims to build consensus among concerned stakeholders and designs IT tourism tools. With this business-oriented programme, UNCTAD is ready to assist developing countries in the development of tourism entrepreneurship, with a special attention for tourism SMEs.

23. The Secretary General of the Ministry of Tourism of Malaysia, Datuk Dr. Victor Wee, stressed that travel and tourism rank on the sixth place of the interest consumers show when accessing the Internet. The Tourism Malaysia website meets a tremendous success. Each month, it receives several millions of visitors. Therefore, there is a demand for in-depth and high quality web content, and this is what e-tourism is about. The use of ICTs for tourism promotion and development not only consists of creating a website as a one-time exercise. If properly used, e-tourism can extend the dissemination and exchange channels between tourism stakeholders and potential tourists, as well as assist users with intelligent services. Of course these new opportunities are accompanied with a number of challenges, such as the need to share knowledge, expertise and know-how. In this regard the Kota Kinabalu conference can provide a decisive input for tourism players in their way to upgrade knowledge and revise strategy.

24. H.E. Mr. Ishaq Khan Khakwani, Minister of Information Technology and Telecom of Pakistan, highlighted in his speech the potential of tourism for Pakistan and the added value that ICT could bring in boosting this sector. Pakistan is a country of 165 million inhabitants. It is involved in a process of improving its telecom infrastructure as well as willing to develop a stronger tourism sector. Therefore, e-tourism could serve as an instrumental tool for ensuring good conditions of development for the Pakistani tourism economy.

25. The core theme of the statement of Dr. Kim Hak-Su, Executive Secretary of UNESCAP, was the vital role of tourism in the socio-economic enhancement of Asia-Pacific developing countries. In many national cases within the region, tourism is one of the valid development options. Furthermore, its numerous connections with the implementation of the Millennium Development Goals (MDGs) need to be stressed. Firstly, in the fight against poverty, tourism has to be considered as a great employment and infrastructure generator, thereby leading to a rise in the standard of living. Secondly, it can help empowering vulnerable populations - women, youth - and plays an increasing role in the development of disadvantaged areas. At last, it deals with environmental sustainability, as it can be a powerful tool for awareness raising and promotion of yield management. The application of ICTs in tourism is not recent; it is evolving. ICTs can at present help translating the potential of tourism as an essential contribution to socio-economic development into reality. By facilitating the access to information and knowledge as well as by fostering the collection of best practices, ICTs offer unprecedented opportunities for tourism businesses, especially SMEs that are often kept aside of the information cycle. However, the bottleneck in the diffusion of ICT for tourism is the lack of adequate human resources, an issue that UNESCAP has been tackling for a long period. It began with the programme "One Village, One Product" in 1979 in Japan, followed by national experiences in Malaysia, Philippines and Thailand where UNESCAP aimed at supporting the development of local economies. One of the conclusions is that local entrepreneurs need guidance and support, especially when dealing with IT-oriented sectors. This is the reason why UNESCAP established the Asian and Pacific Training Centre for ICT for Development (APCICT) with the support of the Republic of Korea. In addition, UNESCAP is involved in tourism related plans and programmes such as the above-mentioned APETIT or PASTA (Plan of Actions for Sustainable Tourism Development in Asia and the Pacific). UNESCAP is ready to extend cooperation with other organizations, with the ultimate goal of a sustainable development of the region.

26. Y.B. Tan Sri Datuk Chong Kah Kiat, Deputy Chief Minister and Minister of Tourism, Culture and Environment of the State of Sabah, Malaysia, closed the ceremony with a statement highlighting the important contribution e-tourism can make to the tourism sector. Considering that ICTs are one of the most effective ways to reach out to the rest of the world, e-tourism can be an instrumental tool in the process of improving developing economies. Nevertheless, the rapid growth of e-commerce components (airline reservation, hotel booking, transportation information, etc.) requires that particular attention should be given to the security aspects of electronic transactions. Furthermore, for now e-tourism is addressed to credit card users, which excludes a significant part of the potential tourists. These aspects can be improved, and given its remote location, a destination like Sabah needs to develop its capacities in e-tourism. The State is already well advanced in the use of ICT for tourism promotion, and intends to improve it. Sabah considers e-tourism as a crucial issue for its tourism development.

B. Panels: sharing experiences and best practices

27. Following the opening ceremony, four panels were organized aiming at providing concrete examples on the use of e-tourism as a key factor of growth and empowerment. Various Asian success stories were then presented. Projects and programmes, steps to undertake, achievements to reach and lessons learned were part of the agenda.

1. Panel 1: ICT - its impact and role in tourism

28. Its objectives were to provide a brief overview on ICT for Development (ICT4D) issues, and to measure their impact on daily tourism businesses. The presentations highlighted the importance of ICT as a valuable instrument in policies aimed at developing sustainable tourism. Three case studies showed the different levels of ICT for the implementation of projects related to tourism through the experience from the province of Quebec (Canada), Thailand, and India. The business perspective of an IT company completed the frame of this first panel.

29. UNCTAD is among the leading agencies in the process of the WSIS (World Summit on Information Society; Geneva-Tunis, 2003-2005) follow-up. It is one of the first United Nations entities to have recognized and assessed the full potential of ICT for Development. Since its real boom at the end of the nineties, ICTs and even more so the Internet, are at the core of all international development strategies. As a driver for development and a catalyst for diversified economic opportunities, ICTs should be used as one of the tools for the achievement of the Millennium Development Goals (MDGs). ICT4D is a transversal issue, related to many economic and social topics, which is the reason why the United Nations Secretary-General launched the Global Alliance for Information and Communication Technologies (G@ID) in 2005. G@ID's goal is to be an open and inclusive forum. Being the product and somehow inheriting from these global initiatives, the UNCTAD e-Tourism Initiative is directly connected with their goals and expected accomplishments. To put it in a nutshell, the e-Tourism Initiative draws an inclusive and multi-stakeholders approach for ICT4D - applied to the tourism sector - that is coming directly from several internationally agreed development objectives.

30. The success story of Thailand in tourism is considered as a model in the region. The country received 13.82 million tourists in 2006. According to the Tourism Authority of Thailand (TAT), this was partly due to a result-oriented strategy, relying among others on two pillars, namely the use of ICT and capacity-building. Based on its assessment that the world Internet usage has been multiplied by 1000 between 1996 and 2006, with Asia in the leading position, TAT launched a proactive online strategy by stating that tourism business required more online information - both for enterprises (B2B for business to business) and for clients (B2C for business to customer). Three main themes had been identified and a multi-channel method was implemented that consists of creating and maintaining a website for each particular issue or expected relationship between TAT and its partners or clients. With regard to the issue of information provision, the TourismThailand website was launched in 2002 and has excellent ranks on search engines. In terms of e-marketing, TAT created its B2B website in 2004. The "Hotdeal" website for the B2C relationship was launched in October 2005. This was a post-tsunami recovery project, which met an immediate success. On the other hand, the capacity-building component of the TAT strategy - the "ICT training for SMEs" project - reached 550 stakeholders in 2006 (countrywide) and shows good results in terms of business awareness and competitiveness enhancement. There are certainly challenges remaining, such as SMEs e-inclusion where the lack of

e-skills is a major issue. But the key words for succeeding in ICT implementation in the tourism sector are partnerships, cooperation and networking.

31. The multinational Microsoft presented the challenges and opportunities of e-tourism for development from a business point of view. It is committed to sustainable development and has been developing a strong interest on tourism. Furthermore, it already offers various solutions for tourism businesses (not only websites but also web alert systems, booking systems and more). Microsoft mentioned to have identified on the one hand a number of obstacles and on the other hand logical solutions to these challenges among which a lack of basic access, infrastructure and common standards that can be addressed by capacity-building activities. There is also a need for long-term political commitment and sustainable business models that need to rely on a wide consensus. Fortunately opportunities are various and promising. The emerging markets are growing fast and the share of tourism (business + leisure) in this commerce is high - the boom of China in the tourism sector is particularly important. A partnership was signed between Microsoft and the United Nations World Tourism Organization (UNWTO) with the aim to support digital inclusion and capacity building in the tourism sector. Both organizations tend to raise awareness and develop communication activities as well as to foster the exchange of best practices, in order to give a substantial support to the development of sustainable tourism.

32. The University of Quebec in Montreal, Canada - a leading university in the field of tourism studies - explained how the regional expansion of Tourism Quebec relied on the development of a multi-functions and adaptable Destination Management System (DMS). Quebec's branding motto can be summed up by this expression: "the tourism experience". The Ministry of Tourism of Quebec (MoT) identified several problems therein, such as the diversity of tourism offices and management structures that led to a lack of common standards, resulting in a less efficient welcoming of tourists. Therefore the Ministry launched a new objective for the Province: to set up a network of regional tourism offices that would aim to improve the quality of tourism services. The method chosen was based on simple pillars: the Ministry selected a number of RTO (Regional Tourism Offices) on the basis of restricted criteria; both structures (the RTO and the MoT) signed a contractual agreement in which the Ministry - through its website BonjourQuebec.com - agreed to provide intranet access, client survey, data entry, pedagogical material and training, etc. A pilot project was launched in 2005 and involved 6 RTO in online training and onsite coaching. After one year - and the launching of a phase 2 involving 43 RTO, the results obtained were an improved client and agent satisfaction, a faster update of the tourism database, and a high increase in reservations of 192% between 2005 and 2006. The experience is now considered as a sound success, and the Ministry is in the process of launching the project for a greater number of RTOs, with some improvements such as an additional database on restaurants. , The Quebec experience and its regional expansion based on an ICT-oriented method is of great interest for other countries that are committed to the development of ICT-based strategies for network building and enhancement of the national identification of tourism information.

33. The "Incredible India" campaign has found a certain success over the recent years. According to the Ministry of Tourism and Culture, the place of India as one of the five favourite destinations worldwide is not due to hazard. The tourism institutions in the country made a lot of efforts, particularly in the areas of human and financial resources in order to end up with the successful campaign "Incredible India" that relies very much on website usage. The Ministry provided participants with an interesting overview of this 35 million USD marketing budget strategy (among which 13 million USD was assigned to electronic tools), which resulted in 85,79% traffic growth between 2003 and 2006. Another measurable impact of this integrated global campaign is the number of page views, which have been multiplied by 5 just between August and December 2006. Designed as an innovative, worldwide and multi-facets campaign, "Incredible India" launched a brand new avatar in tourism promotion: the so-called "kitsch look". It was developed on various media supports: printed (leading newspapers and magazines, outdoor giant posters in important locations - international airports with highest traffic, well-known sites such as Times Square, etc.), electronic media and TV (major TV channels). Two different target markets were identified, namely the "traditional ones" and the "emerging new markets", among which South America, China or Korea. The most relevant was undoubtedly the online strategy. Not only was the campaign referenced on major electronic portals (MSN, Yahoo!) but the Indian tourism institutions also developed other e-methods: thematic or niche micro sites, e-commerce platform, e-mail tracking, e-newsletters - the latter counting with 100 000 registered users in 4 languages, with a website adaptation in function of the targeted countries. With all these characteristics, the "Incredible India" campaign is certainly an impressive model that has to

be analyzed and re-appropriated by other Asian countries, in order to improve their communication strategies and results through ICT-based result-oriented campaigns.

34. Participants mentioned during the questions and answers session following the presentations of the panellists that the role and involvement of public and private sectors have to be re-defined in tourism promotion strategies that rely both on ICT-use and capacity-building. If the private sector often has the leading role in the launching and funding of innovative initiatives, the role of the public sector is not to be ignored and its position has to be reaffirmed. Similar remarks are valid for media campaigns and training projects as well.

2. Panel 2: ICT for sustainable tourism

35. The second panel of the conference aimed at presenting the positive impact that ICT can have on sustainable tourism and revenue generating tourism strategies. Various definitions of sustainable tourism and its segments (pro-poor tourism, eco-oriented tourism, etc.) were given after which several experiences were highlighted through the presentation of relevant case studies. In the Asia-Pacific region, a promising share of the overall tourism product relies on new trends such as eco/nature-based tourism, cultural and religious travels, adventure trips, food tourism, community-based tourism, agri-tourism to name a few. As the speakers underlined, ICT can help developing these trends for the benefits of all stakeholders.

36. The presentation of the United Nations Development Programme (UNDP) in Malaysia focused on the pro-poor strategies deriving from sustainable tourism. Tourism is labour intensive and gender balanced, uses assets that poor have access to and provides disadvantaged areas with an export product that is often their only asset. Sustainable development of tourism is thereby an opportunity for the poor, considering that its approach has to be multi-stakeholders and has to include the poor as one of the groups involved. ICT serving sustainable tourism objectives is an even greater opportunity for the poor: for instance, e-commerce applications are a way for small enterprises, even in rural areas, to be included in the global business market. However, various barriers to ICT adoption by the poor still exist such as the lack of a telecommunication infrastructure, human skills and credit card facilities, as well as instability of power supply and high costs of connectivity. A positive relationship has been observed in Malaysia between the increase of tourist arrivals and the level of employment in the country. This relationship is however not sufficient to explain the results in MDG achievement of different Malaysian regions. For instance, the State of Sabah, one of the most popular in terms of tourism arrivals, is still in a lag in poverty reduction (around 22% of households were still under the poverty line in 2004) when compared to other Malaysian regions. UNDP is now implementing various projects in order to develop sustainable paths of tourism relying on the key assets of Malaysia, among others fauna and flora resources. In the States of Sarawak and Penang, UNDP has programmes to foster tourism activities linked with forest management and prevention of unsustainable practices. These are a part of the answer to the challenges for poverty eradication in Malaysia.

37. In order to sensitize tourism operators to responsible and sustainable tourism, incentives have to be created to foster changes; this is the motto of Wild Asia, an organization launched in Malaysia in 2003. Among the various possibilities to support the sustainable development of tourism, Wild Asia based its promotion not only on ICT-based communication but also on the provision of awards. In fact, Wild Asia was designed to convince tourism operators to "make a difference". By highlighting sustainable practices with the aim to attract tourists, the organization believes that "bothering with responsible tourism" corresponds to customers' demands and will have finally a positive impact on the concerned brand. Actions are based on three core values: minimal impact on environment, support to local economies and respect of local cultures. In this same vein, Wild Asia launched in 2003 - 2004 its first Responsible Tourism Awards. These are good incentives for tourism stakeholders as Wild Asia's awards have good media coverage on the web - by using a variety of tools (from website homepage through e-campaigns to travel shows and videos), value experiences and lessons from practitioners. With this strategy, Wild Asia succeeded in creating recognized, Asia-known awards that are making a difference for the sustainable development of tourism in Asia.

38. The United Nations World Tourism Organization (UNWTO) mentioned that with the rise of sustainable tourism and the wide awareness on tourism as a high-potential economic sector for the achievement of the MDGs, many development-oriented organizations have now included tourism in their programmes. Within the various facets of the sector, sustainable tourism has shown its economic

and environmental potential over the last few years. The positive impact of ICT for developing a sustainable path of tourism is undeniable. Its use brings along great changes in the tourism sector organization, the decreasing role of travel agents and tour operators to be among the most visible ones. Nevertheless the role of ICT cannot be reduced to this aspect only. ICT is a potential generator of many key assets for tourism stakeholders.

39. A sustainable path of developing tourism has to be implemented in tourism areas where fauna and flora are abundant and damaged. Therefore the location of the conference – on an island such as Borneo - provided an excellent case study on the links between environmental conservation and development of tourism, as expressed by the company Borneo Eco Tours. Tourism operators need to bear in mind that sustainable tourism includes inter-related tourism domains (ecotourism, adventure tourism, nature tourism, etc.). All these fields rely on four main pillars: they have to be nature and culture-based; ecologically sustainable; have an education and awareness-raising component and must be at the benefit of the local community. To give an example, ecotourism is a form of tourism that promotes conservation, has low visitors impact and benefits from active socio-economic involvement of the local population. How can ICT help these sustainable tendencies to rise? Easier niche segmentation - designing special websites or web pages for niche markets (special age or interest groups - fans of botanic, wildlife, diving, cultural tours, etc.) - and by reducing marketing and communication costs (and adding visual impact, with videos and images) should be allowed, thereby fostering a simpler marketing of competitive advantages. ICT also fosters the implementation and promotion of environment and community projects. These are easier to set up and to promote. Furthermore, they disseminate the results of such advances. Therefore, ICT is a key asset in the process of building an ecologically sustainable path of tourism, a crucial problem for protected regions such as the island of Borneo.

3. Panel 3: ICT for tourism SMEs: a partnership-building approach

40. The session focused on the ins and outs of ICT-based policies for tourism SMEs. From the perspective of the Asia-Pacific tourism small-scale businesses, there is a growing need to be integrated into the market at global, regional and national levels; ICT is an effective mean for such an inclusion. The IT tool can foster economic linkages and support poverty alleviation programmes with rural and community-based experiences. It helps bridging the digital divide within countries and within a region whereby the expected results are benefiting to SMEs. Strategies for ICT inclusion of tourism SMEs rely on a strong partnership-building approach. They require community and business mobilization in order to capitalize on the implementation of ICT. Wherever ICT-oriented strategies have been implemented to help tourism SMEs in their sustainable development, it has resulted in an increase of tourism incomes and community integration, as the speakers highlighted in their presentations. Therefore, ICT is an instrumental tool in the distribution of leadership as well as in the improvement of local opportunities for the tourism sector.

41. The Tourism Planning Research Group of the Universiti Teknologi Malaysia developed an expertise for the sustainable development of their sector through the analysis of Malaysian tourism SMEs behaviour and their use of ICT - especially in remote areas. There is a great number of SMEs in the country: 92, 2% of its enterprises are small and medium-scale businesses, among which 80% are considered as "micro-enterprises". 48% of these SMEs report a low usage of computers in their daily activities and 19% of Malaysian SMEs want government advisory services in the IT field. Among tourism SMEs are the budget hotels. Only 20% of them state that they use ICT for booking or promotion. As a consequence of this low figure, there is a clearly identified need for ICT capacity-building for Malaysian tourism SMEs, which goes with an increasing demand for in-depth content and e-relationship from customers to tourism businesses. To illustrate this, two Malaysian examples can be analyzed: firstly, the homestay providers (1089 providers registered in 2006). According to tourists, this high-potential accommodation possibility experiences a lack of online information. This issue can be addressed through financial assistance in order to foster the use of ICT by training the stakeholders. Providers, government and industry stakeholders should agree on a vast training plan both for the Malaysia Homestay association members who need to improve the use of ICT in marketing and promotional activities and for the travel agents, who will tend to become travel consultants. Secondly, the striking example of the Perhentian Islands, a well-known location composed by small and medium-scale resorts that only accept walk-in. The Perhentian tourism SMEs make a limited use of e-promotion; this low usage tends to discourage the linkages between the local tourism stakeholders. A new strategy was set up, with the objective of establishing an Internet-based

booking system, thereby allowing better economic opportunities (reduction of leakages, increase of alternative employment opportunities) and improved environmental awareness (dissemination of information and codes of conduct on sustainable practices, etc.). The installation of IT-based systems was completed by the organization of training for local youths and IT staff, thereby bypassing traditional resistances to ICT-based direct promotion by concerned stakeholders.

42. The multinational Visa International highlighted the relevance of e-commerce as an economic opportunity for the regional tourism business when talking about tourism SMEs and their inclusion into e-commerce based systems. Visa International delivers 21% of Asia-Pacific tourism revenues and has 325 million member cardholders in Asia-Pacific. The adoption of IT tools by tourism SMEs is not easy; but it is crucial for small-scale businesses to remain open to innovation and to consumers' trends. The role of credit card enterprises is to support the tourism authorities with data collection and analysis, as well as to identify high-value spending patterns. The consumers' needs must not be left behind in this strategy-building approach: security of payment means, accessibility of e-services. Tourism institutions and credit card companies have to capitalize on their converging expertise to foster the adoption of ICT-based systems by tourism SMEs, thereby improving the tourism incomes.

43. The Asian Development Bank (ADB) identified tourism as a leading sector for the region. It showed impressive figures of growth (1990 - 2004) in international tourist arrivals, especially for North East Asia; some countries like Vietnam, Philippines or Cambodia present excellent results in this regard. ADB acknowledged the potential of ICT in the sustainable development of tourism. The ADB e-Asia and Knowledge Partnership Fund is a programme that aims to contribute to poverty reduction and socio-economic development in the developing member countries through the reduction of the digital divide. Through regional cooperation, open-mindedness to innovation and pilot approaches that rely on three pillars (analysis and research, capacity-building and human resources, information dissemination and networking) ADB intends to support the construction of a fair information society in the region with the highest growth in Internet use.

44. Besides being a regional model for the development of tourism, Thailand is also well advanced in the use of ICT for tourism, further to the presentation made by the Software Industry Promotion Agency of Thailand. The country welcomes more than 2000 travel agencies and there are 5525 hotels registered. With this multiplicity of stakeholders and the national tourism potential, the question of how to enhance competitiveness has been addressed by the creation of the Thai Tourism e-Commerce (TCC) platform. In a nutshell, TCC is a collaborative platform for Thai travel suppliers. It is an interactive and multi-function portal hosting product inventories, a search engine and a centre for messages and documents to name a few functionalities. Its first objective is to cut down costs through public-private partnerships, allowing the pooling of resources and the improvement of productivity. This contributes to the reduction of leakages, a phenomenon that has to be backed-up by the development of innovative software systems. However, the service provided by TCC faces some risks and barriers that are not only related with the digital divide, but also with the issue of interoperability. The collaboration has to prove both solidity and sustainability of the business model for the partners. Nevertheless key factors of success exist: a) TCC is backed-up by the most important tourism institutions (the Tourism Authority of Thailand, the main tourism industry associations), b) the quality of information provided is recognized, and c) the distribution channels are multiple. The platform aims at benefiting to tourism stakeholders, from the travel agents (more choice in products, reduced marketing costs) to the tourists (more choice and flexibility), and from the tourism SMEs (more sales channels, more flexibility) to the software vendors.

45. Community-Based Tourism (CBT) should be considered as a significant opportunity for many Asian countries. ICT is the most efficient tool to support CBT, allowing flexibility and independence in the design and marketing of tourism products. Such assets can lead to a growing income generation. The NGO Asian Encounters aims to promote CBT in the sub-region. It presented the parallel emergence of two similar movements: the multiplication of rural, community-based telecentres for a shared access to ICT, and the growing importance of CBT and travellers' stays in homes of villagers. Combining both movements will help consolidating them and will result in "e-CBT". Basically, within the scope of e-CBT, villagers operate tourism and market and manage it directly through ICT. Local entrepreneurial opportunities are thereby created without high infrastructure investments. In addition, it helps de-intermediating the tourism value chain and it is a solution to the marketing issue often faced by communities that tend to implement CBT. E-CBT implies the use of rural telecentres for tourism purposes by villagers but also for further development activities. The target population for e-

CBT activities goes from backpackers to richpackers. It is an audience that highly values authenticity, that is sensitive to the tourism impact on environment and that is reluctant to the mass advertising proposed by traditional tour operators. E-CBT experiences had already been implemented in the region: such as in Malaysia (with the e-Bario project in Sarawak, the organization of a Knowledge Fair in December 2007; and the Sabah Homestay programme); in Vietnam and in Lao where a pilot project is to be launched. These pilot projects necessarily derive from the multiplication of the installation of telecentres; among others India, Nepal, Malaysia and Bhutan have been pilot countries for the experience of telecentres installation. Tackling the issue of community development, in regions where communities are often isolated and badly integrated in the national economy, e-CBT can participate in poverty reduction strategies. This is obvious in Nepal, where a "Tourism for Rural Poverty Alleviation Programme" has been set up. Relying on technical adequate conditions, e-CBT activities also imply human involvement: the will to set up a community partnership, with a need for the integration of new stakeholders and the mobilization of the whole community. E-CBT has to be bottom-up, while the traditional DMS (Destination Management System) has to be top-down; these are the main lessons that we can learn from e-CBT experiences.

4. Panel 4: e-Marketing and Tourism

46. The last session dealt with e-marketing and tourism and gave a complete overview of the e-marketing for tourism-related issues. It involved three different points of view: university / researcher, service provider and content provider. The panel tended to give to practical guidelines to set up cost effective e-marketing strategies. Through the presentation of success stories, the fourth and last panel offered to participants a useful insight into the high-potential field of e-marketing.

47. The University of Western Australia presented the risks and opportunities when doing e-mail marketing. The e-mail is undoubtedly the most popular Internet application. It is easy in use, inexpensive and offers a wide range of communication possibilities (from the sender to one recipient or many recipients). It is as powerful as it is problematic and even potentially dangerous. With e-mails and ICT diffusion, a bandwagon effect has been observed. Many economic stakeholders simply want to have a website because everyone has a website, and they launch their own portal without any defined strategy. This ignorance leads to major errors in e-marketing, the first being that e-mails are ignored. To avoid common traps, three simple steps need to be observed. The first is e-mail branding; how to extend brand efforts through the choice of domain branded e-mail addresses. The second is e-mail customer services; how to answer e-mails properly, this task implies training of employees or at least, the provision of guidelines. The last is e-mail permission marketing, the stakeholder involved must go slowly, respect privacy and get permission. By following these recommendations, tourism stakeholders will improve the potential of their use of e-mails.

48. As a Malaysian Internet service provider, Telekom Malaysia has assessed the potential of e-commerce for a number of years. Figures now confirm that Malaysia experiences a growing demand for e-marketing and e-commerce. Today, 19 million people go daily online to search for a product. This is a normal consequence of the increase in Internet penetration: 37, 9% in 2005, with 10 million users in the country. Most of them spend an average of 84 minutes per day on the following top three activities: e-mail, educational research and information research. Despite these impressive figures, there is a clear lack of e-commerce awareness and the problem of monetary regulations is still very present. Forecasts show however that IT spending will remain strong and will foster an intense competition, meaning that e-commerce is more and more accepted and used by consumers. All of this can convince economic stakeholders - and among them, tourism businesses - to switch from traditional marketing to electronic marketing. There is still some resistance, as some fields are not yet fine-tuned, such as calculating the ROI (Return on Investment). In order to jump into the e-marketing era, stakeholders will have to pay particular attention to key factors of success, such as the dissemination of information (quality vs. quantity), the networking and communication possibilities, the consumer-generated content and other functionalities. Service providers should support economic stakeholders by assisting them in building communities online like e-business or e-mall websites.

49. Lastly the panel highlighted that combining e-marketing and tourism is a win-win strategy further to the experience of the Canadian province of Quebec. With its 7 million inhabitants and its 21 regions, Quebec is a well-known tourist region. Its Tourism Board named Tourism Quebec has been given three missions: promotion, tourist information and quality development programmes. It has developed three main distribution channels: a website, a call centre and 8 tourist information centres. The

bonjourquebec.com website is a transactional and informational website, with 8,500 links to tourism suppliers and an efficient Intranet. In its e-marketing strategy, Tourism Quebec tends to closely match with the traveller's life cycle: 1. trigger - 2. consideration - 3. research - 4. planning - 5. reservation - 6. travel - 7. post trip. Within this scope, the Tourism Board identified the various steps of its "e-marketing mix": 1. & 2. promote and attract - 3. & 4. inform and assist - 5. sell - 6. serve and support - 7. retain. To support this approach, Tourism Quebec launched various e-marketing applications: web banners, search engine marketing, advertorials or newsletters are some examples of the e-Marketing strategy. Now Tourism Quebec is moving into the Web 2.0 era, which will develop blogs, user-defined tags, shared travel tips, podcasts, videocasts, wikis, etc. The Web 2.0 is a challenge that all e-Tourism websites will have to face and Tourism Quebec provided a useful insight into its specificities.

50. During the questions and answers session, issues were raised on the Web 2.0 applications. The Web 2.0 allows multiple applications in tourism promotion, and tourism stakeholders are often lost and would like to learn more about the relevance of its various functionalities before getting into e-tourism promotion through this new technology. Concerns also tackled the issue of e-marketing for SMEs: tourism SMEs are very interested in developing e-marketing for their business, but they are often unaware of solutions proposed by service providers to the small and medium-scale businesses.

Part III: Closing remarks

51. The closing statement was made by Ms. Anh-Nga Tran-Nguyen, Director of SITE Division, UNCTAD. It recapitulates the main themes that were discussed and the major highlights to be retained from the different sessions. The meetings allowed participants to leave the conference with a set of practical tools and ideas to improve the national tourism sectors in Asia-Pacific through an efficient use of ICT, both on the technical side and on the human resources side. Such measures could be considered as a pillar for national e-tourism strategies aimed at strengthening tourism for development.

52. In her introduction, Ms. Tran-Nguyen emphasized the role of tourism, as a driving economic force and an income generator, which can be a key factor for poverty alleviation strategies for developing countries in Asia-Pacific. Tourism is a sector that is growing very fast, especially in developing countries. Actually, ICT can help developing destinations to better market and manage the sector. Through the Internet or related ICT-based systems such as e-bookings and e-payments, developing countries can increase their autonomy in managing their tourism product. In addition, ICT for developing destinations presents an opportunity for the smaller stakeholders (SMEs, local communities) that can be empowered by the use of easy-to-adopt, efficient and cost-less ICT installations.

53. As a first remark, the emphasis was put on the potential of ICT-based networking schemes to improve competitiveness in the tourism sector. In various countries, models based on competitive collaborations have been implemented, fostering the sharing of knowledge, grouping businesses with complementary competences, and leading to alliances that enhance the potential of the tourism sector. Such models are particularly important for SMEs: they help including small and medium-scale businesses into the regional, national or local market. Nowadays with ICT and the Internet it is quite easy to set up this kind of networks. E-mails and shared working spaces are appropriate tools to use when implementing a network of partners and the creation of such groups must be encouraged in order to maximize results and reduce duplication.

54. However, the lack of e-skills that SMEs often experience is an obstacle to their inclusion within specialized networks. There is undoubtedly a need for training, capacity-building and human resources development for tourism SMEs in the e-tourism field. Most SMEs report a low daily usage of computers, and many of them would like their government to provide them with advisory services. Training and capacity-building activities could be developed in this regard. This is a challenge that most Asia-Pacific countries will have to face in an effort to modernizing their tourism sector in the next years.

55. Apart from the topics related to human skills and IT infrastructures, the legal issue must not be ignored. Many Asia-Pacific countries have been experiencing an incredibly fast ICT development and at present do not have a legal framework to organize and manage the use of ICT in business. This

issue has to be tackled if countries want a fully efficient use of ICT, especially in the tourism sector. Therefore the adoption of such frameworks must be promoted and relevant plans of action must be adopted.

56. Tourism is heterogeneous and fragmented, encompassing a large number of SMEs that are still kept out of the competition. As in others regions of the world, it is still complicated to launch partnerships between public departments and private companies in Asia-Pacific. A culture of public-private partnerships must be disseminated and encouraged in the region in order to become a shared principle as well as a reality.

57. As stated in various sessions of the conference, innovation is one of the drivers of the e-tourism growth: Web 2.0 and innovative IT applications are efficient tools that tourism stakeholders have to rapidly include within their strategy in order not to be left behind. Innovation has a cost; this cost must be shared and the results of innovation, disseminated among partners. To foster this dissemination (best practices, knowledge and sectoral watch, other tourism-related themes), the above mentioned IT-based networks must be used as launchpads for interactive exchanges between tourism stakeholders.

58. Lastly, e-Community Based Tourism (e-CBT) and similar initiatives, should be encouraged - and replicated. They should also be assessed in order to measure the real impact of these programmes on community development.

59. At the end, Ms. Tran-Nguyen warmly thanked the partners of the conference.

Annexes

Annex 1: Attendance

1. Representatives from following international organisations attended the conference:

UNCTAD
UNESCAP
UNDP
UNWTO
ADB

As a national agency for cooperation and development, the GTZ (offices in Sri Lanka and Sabah) also participated in the conference.

2. Participants representing the following structures attended the conference:

Classico Australia	Australia
Department of Tourism, Ministry of Trade and Industry	Bhutan
Ministry of Tourism	Cambodia
Cambodia Association of Travel Agents	Cambodia
Reddy Group	Fiji Islands
South Pacific Tourism Organization	Fiji Islands
Visitors Bureau	Guam
Charlotte Travel Limited	Hong-Kong
High Commission of India in Kuala Lumpur	India
Ministry of Culture and Tourism	Indonesia
Ministry of Tourism and Sports	Kazakhstan
Government Tourist Office	Macau
Yayasan Sabah Group	Malaysia
Sabah Women Entrepreneurs & Professionals Association	Malaysia
Innoprise Corporation SND. BHD.	Malaysia
Sabah Ports SDN. BHD	Malaysia
Palz KK	Malaysia
Balung Eco Resort, Sabah	Malaysia
Mercure / Accor Hotel Waterfront Kota Kinabalu	Malaysia
Teraju Asia	Malaysia
Asia Educational Academy	Malaysia
Sabah Homestay Association	Malaysia
Malaysia Tourism Promotion Board	Malaysia
Nanyang Siang Pau Sdn Bhd	Malaysia
Ministry of Tourism, Culture and Environment of Sabah	Malaysia
Ministry of Tourism - MOTOUR	Malaysia
Penang Tourism Action Council	Malaysia
Sabah Tourism	Malaysia
Universiti Utara	Malaysia
Berjaya Hotels & Resorts	Malaysia
Maldives Tourism Promotion Board	Maldives
Bayangol Hotel	Mongolia
Ministry of Culture, Tourism & Civil Aviation	Nepal
Chamber of Commerce and Industry	Philippines
Ministry of Information, Communication and the Arts	Singapore
Visa International	Singapore
Ministry of Culture and Tourism	Solomon Islands
Visitors Bureau	Solomon Islands
The Tamarind Tree Hotel	Sri Lanka
Adventure Operators Association Sri Lanka	Sri Lanka
Tourism Authority of Thailand	Thailand
Ministry of Tourism	Tonga
Vietravel	Vietnam

Annex 2: Experts' participation

1. The following persons participated in the conference as workshops animators, panellists or facilitators:

Ian Anderson	Senior Advisor	Regional Sustainable and Development Department Wild Asia	ADB
Reza Azmi	Director		Malaysia
Jean-François Bayloq	Chief of e-Services for Development	UNCTAD	Malaysia
François Bédard	CIFORT Director	UQAM	
Hugo Bottelier	Regional Head of New Channels	Visa International	Canada
Auggaphol Brickshawana	Deputy Governor Policy and Planning	Tourism Authority of Thailand	Singapore
Sven Callebaut	Regional Expert Cambodia and Lao PDR	TrainForTrade	Thailand
Julien Cormier	Head e-Marketing	Ministry of Tourism of Quebec	UNCTAD
Peter Froehler	WSIS Focal Point	UNCTAD	Canada
Amran Hamzah	Head Tourism Research Planning Group	Universiti Teknologi Malaysia	
Roger Harris	Founder	Asian Encounters	Malaysia
Jens Friis Jensen	Associate Professor	Roskilde University	Hong Kong
Sanjay Kothari	Additional Director General	Ministry of Tourism and Culture	Denmark
Richard Leete	Resident Representative	UNDP Malaysia	India
Jamie Murphy	Associate Professor	University of Western Australia	
Sanjay Nadkarni	Assistant Professor	Macau University of Science and Technology	Australia
Barry Ridgway	Government Industry Director	Microsoft Asia-Pacific	Macau
Ibrahim Shah Taarit Shah	Head e-Commerce Applications	TeleKom Malaysia	Singapore
Albert Teo	Managing Director	Borneo Eco Tours	Malaysia
Nirachapa Tongdhamachart	Vice President Technology Transfer	Software Industry Promotion Agency	Malaysia
Xu Jing	Regional Representative for Asia and the Pacific	UNWTO	Thailand
Ryuji Yamakawa	Economic Affairs Officer	UNESCAP	

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