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Manatū Aorere

TIMOR-LESTE

Tourism Development Phase 2 (2019-2024) Review

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Glossary of Acronyms
ACT - Associação Café Timor
CCITL - Chamber of Commerce and Industry of Timor-Leste
DFAT - Department of Foreign Affairs and Trade (Australia)
ETDA - East Timor Development Agency
HOTL - Hotel Owners Association of Timor-Leste
IADE - Instituto de Apoio ao Desenvolvimento Empresarial
IVS - International Visitors Survey
MDF - Market Development Facility
MFAT - Ministry of Foreign Affairs and Trade (New Zealand)
MoTE - Ministry of Tourism and Environment (Timor-Leste)
NGO - Non-Governmental Organisation
NSPDT - National Strategic Plan for the Development of Tourism
PWD - Persons with Disabilities
RPTDO - Resilient Pacific Tourism Donor Options
SDP - Strategic Development Plan (Timor-Leste)
TAF - The Asia Foundation
TDP - Tourism Development Program
TL - Timor-Leste
USAID - United States Agency for International Development

Executive Summary

Introduction and Background

This report evaluates the second phase of the Tourism Development Activity in Timor-Leste, implemented from 2019 to 2023. The goal of the program was to improve economic and social opportunities for Timorese households through increased participation in the tourism sector. Managed by the Ministry of Foreign Affairs and Trade (MFAT) in partnership with The Asia Foundation, the program received NZ\$5.6 million in funding. This phase built on earlier efforts, including the development of the Timor-Leste Tourism Strategy in 2018, and aimed to align with Timor-Leste's Strategic Development Plan (2011-2030) and National Tourism Policy (2017). Key focus areas included private sector engagement, destination development in Maubisse and Aileu, and capacity building within government and industry bodies.

Evaluation Purpose and Objectives

The evaluation aimed to assess the effectiveness, strategic alignment, and impact of the program to inform decisions about a potential third phase. The objectives included determining the relevance and coherence of the program, examining progress toward its outcomes, assessing the sustainability of achievements, and identifying lessons learned for future improvements.

Timor-Leste Development Context

MFAT's support for tourism development in Timor-Leste aligns with broader goals of sustainable economic growth, social inclusion, and environmental conservation. Success indicators for MFAT included a well-functioning tourism sector, increased economic opportunities for Timorese households, equitable distribution of tourism benefits, and strengthened bilateral relations with Timor-Leste.

The Government of Timor-Leste's objectives, as outlined in its Strategic Development Plan (2011-2030), focus on economic diversification, infrastructure development, poverty reduction, and environmental sustainability. The National Strategic Plan for Tourism (2023-2030) emphasizes inclusive, sustainable, and responsible tourism development, with a focus on promotion, infrastructure, community engagement, and environmental conservation.

Program Overview and Implementation

The program aimed to increase equitable livelihood opportunities through tourism by empowering local stakeholders, strengthening industry bodies, and developing the Maubisse-Aileu region as a tourism hub. The Asia Foundation was the key partner in implementing the program, which involved grants to local businesses, capacity building, and collaboration with government entities. The program adapted to challenges posed by the COVID-19 pandemic, focusing on government support, industry strengthening, and regional development.

Evaluation Findings and Limitations

The evaluation, conducted between May and July 2024, highlighted several achievements and challenges. The program successfully increased awareness and capacity within government and industry bodies, developed new tourism experiences, and fostered collaboration among stakeholders. However, limitations included a short evaluation period, limited stakeholder engagement, and challenges related to government changes.

Strategic Alignment and Effectiveness

The program aligned well with Timor-Leste's strategic priorities and New Zealand's International Development Cooperation Programme. However, gaps in skills transfer and marketing capacity within the Ministry of Tourism and Environment were identified as areas needing improvement. The program's focus on community engagement, data-driven policy initiatives, and product development contributed to its effectiveness, but further efforts are needed to ensure sustainability and long-term impact.

Recommendations

Key recommendations for future program phases include:

Skills and Capacity Building: Strengthen the Ministry of Tourism and Environment's capacity to manage and develop tourism, with a focus on governance, project management, and public-private partnerships.

Private Sector Integration: Enhance collaboration and coordination within the private sector to drive innovation, improve service quality, and create cohesive marketing strategies.

Destination Management: Develop a national Destination Management Plan that aligns local and national tourism efforts and prioritises sustainable destination, site and experience development.

Visitor Site Development: Work with municipalities to develop key tourism sites, ensuring they offer high-quality visitor experiences while preserving cultural and natural resources.

Marketing: Develop a comprehensive marketing strategy to position Timor-Leste as a unique tourism destination, leveraging the brand "Explore the Undiscovered."

Short-Term Strategy: Implement interim workshops to maintain momentum and build on recent progress in tourism development, focusing on experience development and site identification.

Conclusion

The Tourism Development Activity in Timor-Leste has laid a solid foundation for future growth in the tourism sector. However, continued support is necessary to build on these achievements, particularly in capacity building, destination management, and marketing. A strategic, coordinated approach involving all stakeholders will be crucial to achieving sustainable and inclusive tourism development in Timor-Leste.

Introduction

Background

This report documents the Evaluation of the second phase of the Tourism Development Activity in Timor-Leste covering 2019-2023.

The goal of the Tourism Development in Timor-Leste Activity (the Activity) is 'improved economic and social opportunities for Timorese households through increased participation in the growing tourism sector, including job creation and increased income generation'.

MFAT worked with The Asia Foundation, an international NGO in Timor-Leste, to develop a design for the Activity in February 2019. The total funding for this phase has been NZ\$5.6 million over five years including contingency and monitoring and evaluation. Prior to this New Zealand also supported the development of the Timor-Leste Tourism Strategy in 2018.

Phase 2 aimed to support progress towards the goals of the Timor-Leste Strategic Development Plan (2011-2030) and the National Tourism Policy (2017) to have a well-developed tourist industry by 2030, which attracts large numbers of international visitors in a sustainable way. It focused on supporting the private sector to engage more in the growing tourism industry to increase social and economic benefits to Timorese households.

The Activity built on MFAT's prior support to tourism development in Timor-Leste, which has supported the development of a national tourism policy, tourism

barometer, tourism website and branding, marketing strategy, research and analysis into tourism demand and supply and the establishment of the Hotel Owners Association of Timor-Leste (HOTL).

In response to the COVID-19 pandemic the Activity was redesigned to pivot the focus. The Activity's long-term outcomes were condensed into three main components: increasing the focus on destination development in Maubisse and Aileu, strengthening tourism-related industry bodies, and building capacity within tourism-related departments in the Government of Timor-Leste.

The Asia Foundation has continued to be the key partner for this Activity under Phase 2.

The evaluation has been undertaken between May-July 2024 with in country evaluation taking place June 17-24.

Evaluation purpose

The evaluation aims to assess the effectiveness and strategic alignment of New Zealand's bilateral engagement.

This evaluation will be used by MFAT and its partners to:

- inform decisions on whether to proceed with a third phase of Tourism Development work in Timor-Leste, and if so what should the future direction, design and support be and whether any improvements are needed.
- improve effectiveness and efficiency of tourism-related Activities by utilising the lessons

learned of what works, what does not and why.

- meet the accountability requirement to justify expenditure and demonstrate achievements to our partners, stakeholders and taxpayers.

Evaluation objectives

Objective 1: to assess the extent to which Tourism Development remains a priority for Timor-Leste and the New Zealand International Development Cooperation Programme (Relevance, Coherence)

Objective 2: to examine the progress being made in achieving the Activity's outputs and short- and medium-term outcomes (Effectiveness, Impact)

Objective 3: to determine whether sufficient progress has been made to terminate the Activity or whether an extension would be required to ensure more sustainable and lasting outcomes

Objective 4: to review the value of the approach taken in the Activity (Efficiency, Sustainability)

Objective 5: Lessons learned for improvement – to identify the key learnings to increase positive impact in the future for this Activity and other tourism initiatives.

Evaluation scope

The scope of the evaluation is:

- the time period 2019-2023.
- its geographic focus of Dili, Aileu and Maubisse.
- the target groups of the local communities in Aileu and Maubisse; the General Directorate of Tourism within the Ministry of Tourism and

Environment; the Hotel Association and other targeted business associations, targeted tourism entities and businesses.

The scope of the evaluation excludes:

- 2017-2018 (already covered under Phase 1).

Evaluation design

The evaluation methodology aimed to provide a comprehensive assessment by incorporating a mix of qualitative and quantitative methods. This approach allows for a thorough understanding of both the tangible outcomes and the nuanced, context-specific impacts of the program.

To gather this information, a mixed-methods approach was employed. Quantitative data was collected through questions, analysis of existing databases and reports provided by The Asia Foundation.

Qualitative data was gathered through interviews with multiple stakeholders (including government officials, tourism operators, community members, and development partners Listed Appendix 1) and three focus group discussions with tourism operators in Dili, Aileu and Maubisse.

Appendix 2 includes the assessment matrix used to plan the evaluation including objectives, questions, information requirements, data sources and method of evaluation proposed.

Limitations

The evaluation of the second phase of the Tourism Development Activity in Timor-Leste from 2019-2023 faces a few limitations although they have not fundamentally impeded the development of this report.

The short evaluation period (May-July 2024) may have impacted our ability to speak to all stakeholders. We have however completed all stakeholders identified and made contact with others who were mentioned during the site visit itself in an effort to capture the full impact of the program.

The stakeholder engagement was limited to speaking to those who were originally identified, and the selection of stakeholders might not fully represent all perspectives, particularly marginalised community groups.

During the course of the program there was a government change from the 8th to the 9th constitutional government with significant change in MoTE's structure, functions and personnel. The evaluation predominantly interviewed current government officials hence not gaining insights from those in the early stages of the program.

Timor-Leste Development Context

MFAT's Objectives

Overall, New Zealand's funding for tourism development programs seeks to balance economic growth with environmental and social considerations, aiming for sustainable and responsible tourism development. Programs in Timor-Leste aim to leverage the country's natural and cultural assets to create sustainable economic opportunities, while also ensuring that tourism growth is managed responsibly to benefit local communities and protect the environment.

Success for MFAT in this Activity would be:

- A better functioning tourism sector, working collaboratively to develop sustainable tourism through strengthening the tourism experience of visitors, who will in-turn support further growth of sustainable tourism.
- Timorese households have increased social and economic opportunities as a result of increased participation in the sector.
- The economic benefits of tourism are distributed more equitably, including to rural municipalities and businesses owned by women.
- Development initiatives have impact, are sustainable, represent strong value for money and utilise New Zealand's tourism expertise.

New Zealand's influence in its bilateral relationship with Timor-Leste is strengthened through a continued status as the key donor partner for the

Government of Timor-Leste in the tourism sector.

Government of TL Objectives

The Government of Timor-Leste has articulated several objectives and goals through its **Strategic Development Plan 2011-2030 (SDP)**. The SDP outlines Timor-Leste's vision for development across various sectors and provides a roadmap for achieving sustainable socio-economic progress. Here are some of the main objectives that the government aims to achieve through its Strategic Development Plan:

Economic Diversification: diversifying Timor-Leste's economy beyond its current heavy reliance on oil revenues.

Infrastructure Development: Improving infrastructure including expanding and upgrading transport networks (roads, ports, airports), enhancing access to electricity and clean water, and developing telecommunications infrastructure to support economic activities and improve living standards.

Human Capital Development: investing in human capital through education, vocational training, and healthcare.

Poverty Reduction and Social Inclusion: Addressing poverty and promoting social inclusion.

Good Governance and Institutional Strengthening: Strengthening governance and institutional capacity to promote transparency, accountability, and effective service delivery.

Environmental Sustainability:

Ensuring environmental sustainability including promoting sustainable natural resource management, conserving biodiversity, addressing climate change impacts, and integrating environmental considerations into development planning and policies.

Private Sector Development:

Stimulating private sector growth and investment to drive economic development.

The SDP outlines specific objectives and goals for tourism development that aim to foster sustainable tourism growth that contributes to economic development, preserves cultural heritage, promotes environmental conservation, and enhances the well-being of local communities. By strategically developing its tourism sector, Timor-Leste seeks to create new economic opportunities while preserving its natural and cultural values for future generations.

The National Strategic Plan for the Development of Tourism 2023-2030

reflects the Strategic Plan and reflects its priority activities for tourism. It outlines a comprehensive framework aimed at leveraging the country's unique cultural and natural assets to promote sustainable tourism development.

The VISION of the NSPDT 2023-2030 is *to develop Timor-Leste as a unique tourism destination in Asia, with a Tourism sector that is Inclusive, Sustainable and Responsible.*

Central to this strategy are the following key pillars:

Promotion and Marketing: The strategy emphasises the need to enhance Timor-Leste's visibility as a tourist destination on the international stage.

This involves targeted marketing campaigns that highlight the country's pristine beaches, rich biodiversity, historical sites, and vibrant cultural heritage to attract diverse segments of global travellers.

Infrastructure Development:

Addressing infrastructure gaps is critical to improving the overall tourism experience. The strategy prioritises investments in transportation networks, including roads and airports, as well as accommodations ranging from luxury resorts to eco-friendly lodges.

Diversification of Tourism Offerings:

Recognising the potential beyond traditional tourism sectors, the strategy promotes diversification into niche areas such as ecotourism, adventure tourism (e.g., hiking, diving), cultural tourism (e.g., indigenous festivals, heritage sites), and wellness tourism. This diversification not only enhances visitor experiences but also spreads tourism benefits across different regions and communities.

Community Engagement and Capacity Building:

The strategy underscores the importance of involving local communities in tourism activities. Initiatives include supporting community-based tourism enterprises, preserving traditional knowledge and crafts, and empowering local residents through training programs in hospitality, tour guiding, and sustainable tourism practices.

Environmental Sustainability:

Sustainable tourism practices are at the core of the strategy to safeguard Timor-Leste's natural environment and biodiversity. Measures include promoting responsible tourism behaviour, implementing conservation initiatives,

and integrating environmental considerations into tourism planning and development.

Policy and Regulatory Framework: To ensure the effective implementation of the strategy, the framework emphasises the development of supportive policies and regulations. This includes establishing standards for tourism facilities and services, streamlining permit processes for tourism operations, and enhancing safety and security measures for tourists.

Partnerships and Collaboration: Recognising the need for collaboration across sectors, the strategy encourages partnerships between government agencies, private sector stakeholders, local communities, and international organisations. These collaborations aim to pool resources, share expertise, and align efforts towards achieving sustainable tourism growth and development goals.

Timor-Leste's National Tourism Strategy is designed to harness the country's natural beauty, cultural richness, and untapped potential to foster inclusive economic growth while preserving its heritage and environment. Through strategic investments, community involvement, and sustainable practices, the strategy aims to position Timor-Leste as a competitive and desirable tourism destination in the global market.

Overview of country program

The goal of the Timor-Leste Tourism Development project is to: 'improve the economic well-being of Timorese by increasing equitable livelihood opportunities through job creation and increased income, particularly at the

community level, through engagement in the growing tourism sector.

Achievement of this objective will be facilitated by a strengthened enabling environment that supports economically, socially inclusive, and environmentally sustainable tourism development in Timor-Leste'.

This is being done by focusing program activities on the following outcomes:

1. Timorese stakeholders are empowered through small grant funds that support locally designed initiatives that address emerging and/or cross-cutting tourism development-related issues in their communities.
2. Increased equity in access to the economic benefits of tourism development in Timor-Leste.
3. Timorese government officials with tourism development responsibilities have increased awareness, ownership, and abilities through human resource capacity development support to prioritise and actively promote tourism development in Timor-Leste.
4. Tourism-related industry bodies are strengthened to increase demand for and ensure quality visitor experiences, through capacity building, collaboration and coordination between industry members and the Government of Timor-Leste.
5. The Maubisse-Aileu Region is developed through community, private sector, and government collaboration and partnerships as a dynamic regional hub for inclusive, interactive, and integrated destination tourism.

'Early adopters' and women are key groups to target in terms of tourism demand and supply sides respectively.

There were initially four focus areas: destination development of Maubisse and Aileu, food and coffee tourism, support for industry bodies and support for tourism officials and public servants. A small grant fund mechanism was also a key part of the initial design. These grants were intended to develop new and innovative ideas to promote tourism growth in sustainable and inclusive ways.

In response to the COVID-19 pandemic Activity was redesigned to pivot the Activity's focus. The Activity's long-term outcomes were condensed into three main components:

- **Government Support:** Enhancing the capacity of government officials to prioritise and actively promote tourism development.
- **Industry Strengthening:** Building the capacity of tourism-related industry bodies to increase demand and ensure quality visitor experiences.
- **Regional Development:** Collaborating across community, private sector, and government levels to develop Maubisse-Aileu as a significant tourism destination.

The activity has been implemented by The Asia Foundation (TAF). Since launching the country's first survey of visitors to Timor-Leste in 2014, TAF's Tourism Program in Timor-Leste (TAF-TL) has supported informed tourism development in Timor-Leste through its Tourism Development Project funded with support from the New Zealand Ministry for Foreign Affairs and Trade. The implementation of this Activity builds on extensive research, strategies,

policies, structures and relationships developed with the Government of Timor-Leste, donors and the private sector in previous years.

Other Donor programs

The following programs are playing, or have recently played, a role in supporting tourism development in Timor Leste.

Australian Government (DFAT): DFAT has had some involvement in supporting tourism development in the Pacific region with a notable example being current funding and procurement for a Tourism Planning Adviser to assist the Ministry of Tourism in Timor-Leste with its tourism strategy. This initiative aims to strengthen the Ministry's planning and priority-setting capabilities, which is crucial for the sustainable growth of the tourism sector.

Australia also delivers support through its Pacific Regional Development Program which includes investments in infrastructure, climate resilience, and digital capabilities—all essential for a thriving tourism industry.

Pacific Tourism Organisation (SPTO): SPTO, funded by multiple donors including Australia and New Zealand, plays a critical role in promoting tourism across the Pacific. The organisation supports member countries through initiatives like the South Pacific Tourism Exchange (SPTEx), which fosters collaboration and showcases the region's diverse tourism offerings.

SPTO is also involved in providing training and resources to improve data collection, sustainable tourism management, and digital marketing capabilities within its member countries, including Timor-Leste. The training started just recently

and has been difficult to put into place due to resources, communication difficulties and language differences.

SPTO also manages grant programs aimed at enhancing tourism capacity and promoting regional collaboration in the Pacific. These grants are often targeted at national tourism offices, local communities, and private sector stakeholders to support marketing, training, and sustainable tourism initiatives.

European Union (EU): The EU contributes to tourism development in the Pacific through various programs that align with sustainable development goals. These programs often focus on enhancing infrastructure, supporting local SMEs in the tourism sector, and promoting sustainable practices that protect the region's natural and cultural heritage.

The EU provides grants under its development cooperation framework, which includes initiatives aimed at promoting sustainable tourism, enhancing infrastructure, and supporting local communities and SMEs in the tourism sector. These grants are often part of larger programs designed to achieve Sustainable Development Goals (SDGs) in the region.

World Bank and Asian Development Bank (ADB): Both the World Bank and ADB are involved in large-scale infrastructure projects and capacity-building initiatives that indirectly support tourism development. These projects often include improvements to transportation and communication networks, which are crucial for increasing accessibility to tourism destinations in the Pacific islands.

Both the World Bank and ADB offer grants as part of their broader financial assistance packages to Pacific Island countries. These grants are typically tied to projects focused on infrastructure development, capacity building, and environmental sustainability, which are crucial for tourism development. The grants may be standalone or complement loans and technical assistance provided by these institutions.

US AID: The USAID Tourism for All program in Timor-Leste was an initiative aimed at leveraging tourism as a key driver of sustainable economic growth, community development, and environmental conservation. The program was designed to strengthen Timor-Leste's tourism sector by enhancing the quality of tourism products and services, increasing market access, and improving the capacity of local businesses and communities.

Key components of the program included capacity building for local tour operators, hoteliers, and service providers to improve standards and competitiveness. It also focused on promoting Timor-Leste as a unique, authentic, and culturally rich destination, with a strong emphasis on responsible tourism practices that protect the environment and preserve cultural heritage.

The program successfully established strategic partnerships with both public and private sectors, including local communities, to ensure the sustainability of tourism initiatives. These partnerships were instrumental in developing new tourism infrastructure, enhancing existing sites, and creating marketing campaigns to attract both international and domestic tourists.

The Tourism for All's major achievements included development of strategies and action plans for tourism development at the national and municipal levels; establishment of several professional associations and working groups; signed agreements for tourism development activities; capacity building and technical assistance to a range of government agencies; organization of the Turizmu Ba Ema Hotu (TBEH) tourism awareness campaign; market research; small grants for tourism enterprises; and multiple well-attended events including an international faith-based tourism convention.

Assessment of Data

Visitor Numbers to and Spending in Aileu and Maubisse

It is difficult to provide exact figures for the number of visitors and their expenditure in the Aileu and Maubisse regions due to limitations in administrative and program data. However, insights can be gained from the International Visitors Survey (IVS) by the Asia Foundation, conducted since 2015, and client tracking of TDP grantees in the region.

The IVS data from 2015 to 2022 (excluding 2023, which is still being finalised) shows the number of respondents who visited Dili and the Aileu and Maubisse regions, along with their average and median expenditure.

Key limitations of the IVS data include:

1. It only captures information from international visitors, excluding domestic visitors and their expenditures.
2. Data is collected during specific periods and does not represent the entire year.
3. Maubisse is not separated from other locations in the Ainaro municipality.
4. Visitor data at the municipal level can vary significantly due to special events. For instance, a ten-fold increase in visitors to Aileu in 2022 was likely due to a large-scale celebration.
5. Expenditure data might include costs associated with reaching the location, such as car hire in Dili.

Grantee Clients

TDP has provided grants to thirteen businesses in the Aileu and Maubisse regions and has tracked their client numbers since their respective grants began. The data from over 50 businesses in the region indicates that their tracked thirteen businesses reflect an upward trend in visitors, with nearly 700 people visiting annually. However, these numbers do not represent all visitors to the region. Increased competition, such as more cafes opening, has also impacted client visits. For instance, Girasol Café reported a decrease in clients between 2022 and 2023 due to more restaurants opening in the area.

Overview: TDP mapped tourism assets in the Aileu and Maubisse region from 2019-2020 and has tracked changes in the tourism business landscape, influenced by factors like the COVID-19 pandemic and the 2021 floods. Despite these challenges, the tourism industry has shown resilience with new businesses emerging and existing ones evolving.

Aileu:

- 2020 mapping: 34 businesses identified.
- 27 businesses remain active.
- 18 new businesses opened, totalling 45 active businesses by 2024.
- 6 businesses existed before 2020; 12 emerged between 2020-2024.
- Five grantees developed niche tourism products.

Maubisse:

- 2019 mapping: 11 businesses identified.
- 9 businesses remain active; 2 ceased operations.
- 13 new businesses opened, totalling 21 active businesses.
- Three grantees developed niche tourism products.

TDP Training Initiatives:

- 33 training sessions with 21 types of training conducted in Dili, Aileu, and Maubisse.
- 441 participants: 299 women, 142 men.
- The project emphasises inclusive engagement despite lacking data on Persons with Disabilities (PWD).

Overarching Findings

The Tourism Sector

The opportunity

There is huge potential for nature and adventure tourism in Timor-Leste to be attractive to new and emerging international markets as well as TL based early adopters. To ensure strong differentiation of Timor-Leste, experiences need to have strong cultural connections to deliver the story.

There is an aspiration across Government, both National and local, as well as NGOs and the private sector to 'do' tourism better. Towards this end,

- The MoTE is looking to develop a Tourism Masterplan for Timor-Leste to provide strategic direction and actions that promote the thinking around tourism. This plan will go beyond the National Strategic Plan for Tourism. It will engage relevant stakeholders at national, regional and local level to focus on delivery across the nation and at destination and municipality level including determining the priority or 'hero' destinations to be further developed and promoted to drive international visitation.
- Municipalities that we dealt with (Aileu and Maubisse) expressed their aspiration to provide leadership in tourism at the local level and to work with the community and industry to strengthen the tourism offering and sector.
- Efforts need to be made to create understanding of what tourism

means and the elements that are critical to a successful sector.

- There is good political will and commitment from the current President of Timor-Leste Jose Ramos Horta to continue to develop the brand for increasing the attraction of the country in international markets.
 - This year, for example, the President has initiated a plan for a national festival that will take place in the Municipality of Ainaro - Administrative Post of Maubisse.
 - One of the successful events lead by the initiative of the president is the Tour de Timor, an annual international mountain bike race that was first held in 2009.
- The authorities of the Municipalities of Aileu and Administrative Post Maubisse have also addressed the potential to integrate tourism with cultural and agricultural activities.

Challenges for the sector

- International awareness of Timor-Leste as a tourism destination remains low.
- The brand *Explore the Undiscovered* has strong potential and does reflect the assets of the country. However, product that delivers on this brand is limited. The development of products such as mountain biking and packaging of riding, canyoning, coffee etc as done by TAF with ACT are examples

of what is required to support the brand.

- Whilst the program did map tourism assets, creating greater awareness of opportunities, there has been limited development of attractions and sites in municipalities.
- Marketing capacity within the Ministry for Tourism and Environment including access to a strong consumer facing website is limited.
- Although the program did result in players in the tourism industry coming together in Aileu Maubisse, the private sector is not well organised in regional areas.
- Public entities need to be empowered to work together, including:
 - the Ministry of Tourism and Environment and Local Government through the Ministry of State Administration to envision tourism development, especially in identifying tourism products and establishing data.
 - other entities such as the Secretary of State for Culture Arts and the Ministry of Agriculture, Fisheries and Forestry that have assets and potential experiences that are essential to tourism such as ecotourism in terrestrial and marine protected areas.

Expansion of Cultural Heritage and Indigenous Tourism

The report acknowledges the importance of integrating regional level activities, particularly those delivered through the South Pacific Tourism Organisation (SPTO), into the broader tourism development strategy for Timor-Leste. Although there have been initial challenges in establishing a strong connection between SPTO and the MoTE due to organisational changes linked to the Timor-Leste electoral cycle, recent progress has been made. Cooperation between SPTO and MoTE is now advancing in key areas such as research and data collection, sustainable tourism management programs and enhancing digital capabilities. As this collaboration develops, it is crucial that future bilateral tourism support from New Zealand considers these regional synergies to avoid duplication of efforts and ensure that resources are used efficiently.

In designing future tourism initiatives, it is also important to explore and leverage Indigenous and Māori cultural synergies. New Zealand's experience in integrating Māori culture into its tourism offerings provides valuable insights that could be adapted to support Timor-Leste's cultural tourism development. By drawing on Māori cultural principles, such as kaitiakitanga (guardianship of the land) and manaakitanga (hospitality), Timor-Leste can enhance its own cultural tourism practices ensuring they are sustainable, respectful, and deeply connected to local traditions. Incorporating these cultural synergies into the regional and bilateral tourism programs can enrich the visitor experience, strengthen community involvement, and promote a more holistic

approach to tourism that respects and celebrates cultural heritage.

The short-term strategies identified further in the recommendations section of this report provide an opportunity to start the journey toward expanding cultural heritage and indigenous tourism within Timor-Leste.

The Timor-Leste study visit to New Zealand in May 2023 provided a valuable opportunity for Timorese tourism stakeholders to gain first-hand insights into the successful integration of cultural heritage into tourism. The visit allowed participants to observe how Māori culture is seamlessly woven into New Zealand's tourism offerings, not only as a means of preserving and celebrating Indigenous traditions but also as a key driver of economic growth.

The experience likely highlighted the importance of community involvement, authentic cultural representation, and sustainable tourism practices—principles that can be directly applied to Timor-Leste's context.

The visit also served as a platform for establishing connections with New Zealand Māori Tourism (NZMT), which could play a pivotal role in guiding the development of similar cultural tourism products in Timor-Leste. The practical insights gained from the visit, such as the importance of storytelling, visitor engagement, and the protection of cultural sites, are directly applicable to Timor-Leste's efforts to develop its own cultural and Indigenous tourism sector.

Cultural product development in Timor-Leste is still in its early stages, but there is significant potential for growth, especially if aligned with successful models like that of Māori tourism in New

Zealand. Currently, Timor-Leste has rich cultural assets, including traditional crafts, music, dance, and historical sites, which are underutilised in the tourism sector. However, these assets offer a strong foundation for creating unique and authentic tourism experiences that can attract both regional and international visitors.

To fully realise this potential, Timor-Leste could benefit from a strategic partnership with New Zealand Māori Tourism. Such a partnership could provide mentorship and technical assistance in areas such as product development, marketing, and sustainable tourism practices. New Zealand's experience in creating tourism experiences that are deeply rooted in Indigenous culture, yet accessible and appealing to a global audience, offers a valuable blueprint for Timor-Leste.

Additionally, by fostering collaborations between Māori tourism operators and Timorese communities, there could be opportunities for knowledge exchange, capacity building, and the co-creation of culturally enriched tourism products.

Aid program delivery

There was strong support for the partnership with New Zealand government through MFAT and the Embassy staff in the delivery of the support program, and positive feedback on the relationship and communication with MFAT.

The program was delivered in an effective and efficient manner although there are areas to address with the delivery partner TAF in particular around communication and ensuring the sustainability of the program and resilient business planning. The adaptive approach of redesigning part of the program in response to COVID

was done well and resulted in a better outcome than could otherwise have been expected. Government stakeholders expressed their support for the way the program was designed and for the way they were engaged in the design ensuring it addressed their needs.

Most of the activities under the program have been successful in achieving short term outcomes, and some have the potential to deliver medium term outcomes. However, it will be critical to see ownership of sector development at National level supported by local ownership at community/municipality and administrative post level combined with strong private sector buy in moving forward. Without this, ongoing growth and development of the tourism sector is unlikely to be achieved.

Stakeholders were unanimous in their wish to see the program continued but with measures in place to ensure it was sustainable and there was a higher level of skills transfer.

Strategic Alignment and Objectives

The program has strengthened the base policy context through the development of the National Strategic Plan for the Development of Tourism 2023-2030 that has been made available across Government consistent with the Timor-Leste Strategic Development Plan 2011 – 2030, and a summary version that is more readable by other players in the sector. Officials in the Ministry of Tourism and Environment are committed to the strategy and to pursuing its implementation through the development of a Tourism Masterplan.

Infrastructure development and good governance are important factors in

setting the objectives of the programme to focus its key activities. It is critical to ensure tourism continues as a National Government policy priority and to support the Government in adopting the principle of working together among key entities (Ministry of Tourism and Environment, Ministry of State Administration, Secretary of State for Culture Arts and the Ministry of Agriculture, Fisheries) and NGOs as committed in the national documents such as the national development plan, strategic plan and political priorities of the 9th Government.

Discussions with municipalities and administrative posts through the program combined with the tourism asset mapping project have been successful in encouraging local officials to consider municipal and local visions for tourism and to consider what is required to progress tourism development in Aileu and Maubisse.

The Tourism Masterplan now needs to bring together the national strategic approach and local area visions in a realistic and achievable plan with commitment at all levels of government.

Tourism data collection has also been delivered to provide baseline data against which performance of the sector can be measured going forward.

Communication

Whilst there was positive sentiment regarding the open lines of communication and information sharing between development partners (MFAT/TAF/MDF etc), there was a strong message that communication about program activities was irregular. In our evaluation many stakeholders that we expected to be engaged had little knowledge about the program and

activities. This may be an issue within their organisations, but we saw no evidence of a clear communication strategy to ensure all the main players in the sector had clear and ongoing communication about the program and developments within the program. Examples include:

- Several stakeholders that could have been instrumental in dissemination of grant program information to businesses were not aware of the program (eg local Chambers of Commerce).
- Grant applicants reported not being advised of being unsuccessful.
- Training providers that offered services were not advised of outcomes.
- Municipalities and administrative posts reported early communication with limited follow up.
- Several stakeholders were unaware of the Tourism Symposium.
- There was a multi phased approach to the grant programme, but it was difficult to determine what criteria had to be met in order to qualify.

There was a sentiment that a Tourism Working Group could be effective if clear terms of reference and effective leadership is put in place. Whilst the evaluation highlighted that there were good conversations between specific stakeholders for the programme, it also identified the potential for greater benefits and mitigated risk of programme duplication if the working group (that started but subsequently ceased) were more effective.

Stakeholders in both Aileu and Maubisse indicated that engagement with community leaders was not effective or

consistent. Social norms and cultural values influence the effectiveness of communication of Timorese people's behaviours, especially in facilitating coordination management, communicating interests and increasing participation. Consideration and understanding of these values are very instrumental for building trust and buy in. To this end, projects that work directly with the community need to be based on initial coordination with local authorities from municipal to village levels including the involvement of community leaders such as traditional leaders and veterans including the church.

Skills development and transfer

Skills development within the Government, particularly Ministry for Tourism and Environment has been limited. Projects (Tourism Strategic Plan, research and data, website and marketing support etc) have been delivered with work undertaken by The Asia Foundation with limited capacity building of Government officials to carry these projects on beyond the life of this program. This has in part been due to Government change (and subsequent transfers of officials) but also a focus on getting the projects achieved rather than skills transfer.

Work with Associations including Hotel Owners of Timor-Leste (HOTL) and Associação Café Timor (ACT) has developed skills within these organisations to partner and collaborate to develop and promote products together that can underpin better visitor experience offerings suited to relevant markets. Outputs have included specific packages for early adopter markets although booking systems are not yet effective.

The work with the two associations was also less effective in building local ownership because the two associations have less local power. Whilst there are many members across the country including in Aileu and Maubisse, the Executive and staff are predominantly Dili based with less influence on local areas. In addition, a number of the main actors within the two associations are from foreign investors with national agenda and do not work under local agencies such as the chamber of commerce (CCITL).

It is understood that the program routinely assessed the potential of closer engagement with CCI-TL though its yearly stakeholder mapping and political economy analysis and revealed that CCI-TL was not an optimal avenue through which to bolster the program activities. At a local level in Aileu and Maubisse, however, local Chambers of Commerce are closely aligned with local businesses and offer opportunity for effective engagement and communication. More support is required to municipalities and administrative posts to progress tourism development and build skills in community-based tourism as well as tourism site development. This could take the form of Technical Assistance funded to work within one of the municipalities but working across the two areas with a focus on supporting new and emerging businesses, assisting with visitor site development and encouraging new experience development/businesses.

Capacity building

The development of partnerships with HOTL and ACT has been effective in bringing the private sector together to work towards common goals resulting in:

- Improved and effective relationships.
- Some new product packaging.
- Cooperative marketing approach.
- Skills transfer to housekeeping and food and beverage staff.

The grants program was well received and successful in capacity building particularly in hospitality – coffee making/barista skills and equipment, house-keeping, food handling, customer service. The training was valued and useful at local areas of Aileu-Maubisse and set a higher bar for the industry. It also facilitated operators talking to one another and recognising the benefits of working together.

The organisation of local events (see below table) supported skill development as well as some sales, but the cost of travel and bringing stock mitigated profit for some artisan businesses.

TABLE 1 VISITATION TO AILEU COFFEE FESTIVAL

Date	TAF support to the Aileu Coffee Festival	Participants	notes
9 Oct 2021	Regional Brewing Competition	65	Participants from national, local and international stakeholder, donors, and tourism businesses in Aileu-Maubisse region.
9-10 Sept 2022	National Coffee Brewing Competition	250	
15-16 Sept 2023	Timor-Leste Aeropress Competition	543	

The program was effective in delivering benefits at a community level to predominantly women, whilst the events attracted the targeted early adopter markets specifically from Dili.

Support to help local micro businesses work such as flower growers and handicrafts with Dilli markets would be a valuable addition to the program.

Training was delivered by TAF training staff which, whilst offering training specific to local needs, does not build capacity of local people to continue the program. During conversations during the site visit, there was a desire to see more Train the Trainer opportunities provided to the local areas (such as through Municipalities) who could then continue that training at regular intervals. Local people being trained as trainers offers a more sustainable opportunity for local areas.

The majority of training and capacity building was focused on base level skills. Further development of business management skills is required in local areas.

Discussions indicated that the relationship is limited between TAF and national training provider agencies such as ETDA and training centres established in the municipality to deliver government activity programmes in business empowerment through Instituto de Apoio ao Desenvolvimento Empresarial (IADE). Working with these agencies can support sustainability and continuity including reducing dependence on donor projects on capacity building programmes.

Grants program

The grants program was well received and delivered outputs in terms of

- New coffee experiences
- Trained barista staff
- Mountain bike trail development
- Cafes
- Packaged product
- Marketing collateral
- Artisan product and distribution support

See tables below.

TABLE 2 AILEU

Aileu							
No	Grantee	Grant Start	Grant Completion	Clients			
				2021	2022	2023	2024 Q1
1	Esperansa Sewing Group	2020	2020	25	50	50	
2	Girasol Cafe	2021	2021	125	450	300	125
3	Maddog Adventures	2022	2022	N/A	N/A	37	
4	Dili Vanili	2022	2022	N/A	100	180	
5	ACT - Assosisaun Cafe Timor by RNB	2022	2023	25	37	68	
6	Comrider MTB Adventure	2023	2023	N/A	N/A	7	
7	Naterra & JUTAET	2024	2024	N/A	25	24	
8	Timor Sightseeing Tour & Travel	2023	2024	N/A	N/A	N/A	15
9	QX	2023	2024	N/A	N/A	N/A	
Total				175	662	666	140

TABLE 3 MAUBISSE

Maubisse							
No	Grantee	Grant Start	Completion Year	Clients			
				2021	2022	2023	2024 Q1
1	Hanoin ba Oin	2021	2021	13	25	32	
2	Comrider MTB Adventure	2023	2023	N/A	N/A	N/A	8
3	COCAMAU (and ACT) - Maubisse Coffee Eperiences - Rebutelu Capture Maubisse	2022	2023	N/A	N/A	32	
4	Timor Sightseeing Tour & Travel	2023	2024	N/A	N/A	N/A	15
5	Sara Unip. Lda	2023	2024	N/A	N/A	N/A	
Total				13	25	64	23

However, with limited growth in sustainable tourism numbers to Aileu and Maubisse, the impact in terms of tourism does not appear to be high, and any future program needs to be complemented by tourism development and marketing strategies.

Grant applicants reported the process was onerous to apply and some were not notified if unsuccessful. The T&Cs for the grants were light, and it was obvious they were developed to ensure ease of administration. There were some concerns in communities re transparency of the grant program.

The following three areas illustrate the success of the grants program.

1. Offered Targeted Support to Local Entrepreneurs: The grants program successfully identified and supported local entrepreneurs. This targeted approach helped empower small businesses, enabling them to innovate, expand, and contribute to the local economy. The focus on grassroots entrepreneurs was well received.
2. Capacity Building and Skills Development: A significant success factor was the integration of capacity-building initiatives alongside financial support. This holistic support system was crucial in ensuring that grant recipients could effectively utilise the funds.
3. Strong Community Engagement: The program's emphasis on community engagement ensured that the grants were aligned with local needs and priorities. By involving community leaders and stakeholders in the selection and implementation processes, the program fostered a sense of ownership and accountability

among participants, which contributed to its success.

There are a number of strategies to consider to amplify these successes in potential future programs.

1. Expand Targeted Outreach: Future programs can amplify the success of the grants program by expanding outreach efforts to ensure that even more diverse and underserved communities are reached. This can be achieved by working closely with local organisations and leveraging digital platforms to raise awareness about the program.
2. Enhance Capacity Building with Long-Term Support: Building on the success of the capacity-building component, future programs should include long-term mentorship and support networks for grantees. Establishing alumni networks and continuous learning opportunities will help sustain the impact of the grants and foster a culture of ongoing development.
3. Increase Community-Led Initiatives: Amplifying community engagement can be achieved by increasing the role of community-led initiatives within the program. Encouraging proposals that come directly from community groups or that have strong community backing will ensure that the projects funded are deeply rooted in local needs and have the support necessary for success.

Moving forward it will be necessary to identify and assess the availability of grant programmes implemented by other donor projects and the Government (not necessarily tourism related) to avoid duplication and promote new start-up business.

Mapping of tourism assets

Many stakeholders commented on the value of the asset mapping and commented how much it has contributed to their thinking around tourism.

The mapping identified existing and planned experiences across Aileu and Maubisse as well as encouraging local authorities to consider the sites in their area that might be suited to development for tourism. TAF mapped existing experiences as well as current marketing initiatives and supported strengthening social media marketing. Local authorities retained records of their site priorities that will be fed into master planning and development as funds become available.

A Tourism Masterplan is proposed by MoTE as the next step in the planning process, and this will provide direction for priority destinations and priority investments. This needs to be done in partnership between national and municipal governments as the program has fostered local area thinking about their tourism offering – this needs to inform and be informed by the Masterplan process.

If the mapping (and indeed data collection) is to have long term value, it is also important to ensure commitment within public institutions for leading the database management as well as the capacity to continue the research (such as through research units in the Ministry for Tourism and Environment). This will require integration with other relevant agencies including the Ministry of State Administration, Secretary State of art culture and Ministry of Agriculture, Fisheries and Forestry.

The program mapping needs support to continue the path towards fruition – to plan, consolidate, implement – in Aileu and Maubisse before starting with a new destination.

Sustainability

Delivery of the program has achieved short and potentially medium-term outcomes, but there are gaps in skills transfer that impact the sustainability of the program. These include:

- Limited skills transfer in Ministry of Tourism in terms of marketing, data collection, website development/ownership.
- Capacity building/training used internal resources rather than in country training organisations and local trainers.
- Grants funded first stages but with no ongoing support (and tourism growth), some businesses may fail.

Marketing needs to be integrated between MoTE, Associations and local areas to be effective; without effective marketing the sector will not grow.

Aid delivery

New Zealand's policy for International Cooperation for Effective Sustainable Development, emphasises a primary focus on the Pacific region in line with the Pacific Reset. This policy reflects a shift towards deeper collaboration with Pacific partner countries and greater ambition for Pacific engagement. It affirms four guiding principles for development work: effectiveness, inclusiveness, resilience, and sustainability. The purpose of New Zealand's IDC is to foster shared prosperity and stability in the Pacific and beyond, leveraging New Zealand's knowledge and skills to support

sustainable development, reduce poverty, and contribute to a more secure, equitable, and prosperous world.

This evaluation of the New Zealand Aid Programme in Timor-Leste revealed mixed results in meeting delivery expectations. While the programme achieved notable successes in community-based tourism, short-mid term capacity building and data-driven policy initiatives, it faced challenges in government engagement, sustainable capacity building programmes, and effective marketing to underpin delivery of the brand and strengthened awareness of Timor-Leste's points of difference in nature, culture and undiscovered adventure. These findings indicate that while the programme aligns with New Zealand's principles of effectiveness and sustainability, there is a need for enhanced coordination, ongoing adaptive management, and stronger stakeholder collaboration to fully realise its potential.

The Aid programme objectives need to continue to align with the priorities of Government.

Evaluation Conclusions

Achievement of Program outcomes

Whilst the majority of the deliverables outlined within the scope of the programme have been delivered, there is evidence that the scope did not go far enough and provide sustainable development within the sector. The programme has contributed to building the foundation for development and growth of the Timor-Leste tourism sector. However, there is an ongoing need to plan, consolidate and support the sector to ensure sustainability.

The table below provides commentary against outcomes.

Outcome	Commentary
Timorese stakeholders are empowered through small grant funds that support locally designed initiatives that address emerging and/or cross-cutting tourism development-related issues in their communities.	<p>Local grant funds were dispersed using criteria that were quite broad and supported locally designed initiatives including coffee and other agricultural experiences as well as hospitality. This aspect of the program did address cross cutting issues including greater participation by women, improved community involvement and benefit sharing from tourism.</p> <p>Working together in Aileu and Maubisse has empowered people to work together, and there is evidence of emerging industry associations in both Maubisse and Aileu.</p> <p>Issues with the criteria, communication regarding the grant availability and process, and terms and conditions were raised during the evaluation process.</p> <p>Important to maximise efforts in establishing and encouraging new start up business and ensuring continuity of support to ensure sustainability.</p>
Increased equity in access to the economic benefits of tourism development in Timor-Leste	The program has only made a very small difference in terms of growing economic benefits of tourism and whilst benefits were offered to communities of Aileu and Maubisse, there has not been a significant change against this outcome.
Timorese government officials with tourism development responsibilities have increased awareness, ownership, and abilities through human resource	Officials have greater awareness and ownership of tourism and aspirations to drive growth through good planning and implementation which has the potential to result in stronger tourism development.

Outcome	Commentary
<p>capacity development support to prioritise and actively promote tourism development in Timor-Leste</p>	<p>There are still skills gaps in delivery in areas of marketing, data analysis, content development, packaging, capability building and alignment of experiences with target markets and marketing activity.</p> <p>Many stakeholders advised that a major issue for tourism development was the limited capacity within the MoTE; that there are high levels of staff, but many with limited capacity in core functions, and critical functions without adequate resourcing to deliver results.</p>
<p>Tourism-related industry bodies are strengthened to increase demand for and ensure quality visitor experiences, through capacity building, collaboration and coordination between industry members and the Government of Timor-Leste</p>	<p>Two national tourism related industry bodies have been considerably strengthened and demonstrated results in terms of product development, packaging and promotion and some new visitor experiences. They have developed a strong collaborative approach with industry members and with the Government.</p> <p>Additional effort is required to further develop and support industry associations such as those in local areas. For example, in Aileu and Maubisse there is a critical need for capacity building, collaboration and coordination between industry members as well as experience development to reflect the assets of the regions. There was evidence that informal industry associations exist, but no resource or assistance has been given to them.</p>
<p>The Maubisse-Aileu Region is developed through community, private sector, and government collaboration and partnerships as a dynamic regional hub for inclusive, interactive, and integrated destination tourism.</p>	<p>Whilst there are some new experiences and better customer and hospitality services in Aileu Maubisse, there is still not a strong awareness of these destinations nor are there adequate distinctive experiences to drive growth into a dynamic regional hub.</p> <p>With municipal leaders discussing their vision for tourism, and the need for resourcing to support implementation, collaboration between national and municipal government to determine and deliver priority destinations will be required if a dynamic regional hub for inclusive, interactive, and integrated destination tourism is to be achieved.</p>

Relevance and coherence of program

Appropriateness

The tourism context in Timor-Leste in which the program has operated has not changed with:

- A low awareness of the country for tourism.
- Poor infrastructure.
- Limited and ineffectual marketing.
- A weak enabling environment.
- High travel costs.

The original program was changed with co -design between MFAT, MoTE and TAF in response to COVID and the resultant program was appropriate to the needs of Timor-Leste.

Given the change of government from 8th to 9th, TAF through the program also had to build new and grow existing relationships, ways of working, and identification of the Ministry's policy/program and capacity development priorities.

Changes in staff within MoTE result in mixed awareness of the program, but the Director General is committed to continuing implementation of the National Tourism Strategy and cooperative approaches to tourism development with Municipalities, private sector partners and community.

MoTE is proposing to develop a Tourism Masterplan that will prioritise areas of tourism potential and growth and an approach to implementing the Tourism Strategy which should provide strong direction for the country and municipalities.

Partnerships with NZ

Stakeholders expressed strong support for the way in which NZ partnered with relevant stakeholders across Government and private sector and for the clear and open communication that occurs.

With the exception of Australian government through MDF, there is limited additional aid being provided to tourism since the completion of the USAID program. Yet tourism continues to be a key priority for TL in diversifying the economy.

Alignment with 2023 Resilient Pacific Tourism Donor Options paper

The New Zealand Aid Programme in Timor-Leste aligns well with the 2023 Resilient Pacific Tourism Donor Options paper through its focus on sustainable development, community engagement, adaptive management, multi-stakeholder coordination, and strategic marketing. These alignments ensure that the program contributes to the broader goals of fostering a resilient and prosperous tourism sector in the Pacific region.

It delivered outcomes in terms of:

- National Tourism Strategy to provide direction for destination development and tourism growth.
- Strong base data and tourism asset mapping.
- Some capacity building and product development in Aileu and Maubisse.
- Working with and strengthening existing industry associations, in particular HoTL and ACT.

It remains important to consolidate Timor-Leste as a destination in terms of

product development to underpin the brand through prioritisation of areas for tourism development, experience development and investment in attractions.

Importantly, to align with the RPTDO, critical factors will be:

- Ensuring strength of collaboration between MFAT, MoTE and the private sector.
- Pursuing effective destination management and marketing to build awareness of Timor-Leste as a tourism destination and drive growth in jobs, wellbeing and economic return from tourism growth.
- Building further capacity within MoTE and partnerships with other ministries as well as municipalities to ensure sustainable resource management and engagement with arts and culture.
- Capitalising on the data systems established through the program to report on how tourism is contributing towards climate resilience, wellbeing, social inclusion, and regeneration of the environment.

Effectiveness and impact of program

Delivering against NZ policies

The Activity has predominantly been delivered and has made considerable difference in terms of:

- National Tourism Strategy providing the framework for continued development and growth.
- Data as a base for measurement of change.

- Functioning industry Associations (HOTL and ACT).
- Base skills development in Aileu and Maubisse.

And some change in terms of:

- New products and experiences.
- Improved hospitality in local areas.
- Product packaging.
- Communication within the industry.

It is important to acknowledge the importance of integrating the key themes and priorities identified in the Resilient Pacific Tourism Donor Options Report into the current and future tourism strategies for Timor-Leste.

1. **Resilience and Sustainability:** The 2023 Resilient Pacific Tourism Donor Options Report emphasises the need for tourism sectors in Pacific nations including Timor-Leste to enhance their resilience to environmental, economic, and social challenges. This report recognises these imperatives by recommending strategies that build resilience within Timor-Leste's tourism sector, such as promoting sustainable tourism practices, supporting local communities in managing tourism resources, and incorporating climate change adaptation measures into tourism planning and development.
2. **Community Engagement and Inclusive Growth:** The Resilient Pacific Tourism Donor Options report also highlights the importance of community engagement and inclusive economic growth. In line with this, our recommendations focus on empowering local communities to take an active role in tourism development, ensuring that the benefits of tourism are equitably distributed and that

community voices are integral to decision-making processes. By fostering community-based tourism initiatives and supporting local entrepreneurship, the report aligns with MFAT's focus on inclusive growth as a pathway to resilience.

3. Strategic Priorities for Future Programs: The future focal areas outlined in the Resilient Pacific Tourism Donor Options Report are reflected in our strategic recommendations for Timor-Leste. These include enhancing disaster risk reduction capabilities within the tourism sector, promoting sustainable infrastructure development, and building local capacities to manage and respond to tourism-related challenges. By aligning with these strategic priorities, the report ensures that Timor-Leste's tourism development remains relevant and effectively positioned to attract ongoing support from MFAT.

4. Monitoring and Evaluation: To further align with the Resilient Pacific Tourism Donor Options Report, our report suggests the incorporation of resilience and sustainability metrics into the monitoring and evaluation frameworks of tourism projects. This approach will ensure that progress is measured in accordance with the donor's expectations and that projects remain adaptable to the evolving challenges of the region.

Quality of delivery

The program has been delivered on time (to date) and within budget.

The training that was delivered was well received by those in attendance, especially those in customer service roles in guesthouses and coffee

operations in Maubisse-Aileu, but little to no evidence was seen of training and support to lift the business capability of owners and support resilient business development.

Support provided to the Ministry of Tourism and Environment was appreciated, but the evaluation showed that there was not enough training provided for staff members to be able to manage their assets effectively. The website needed to be updated, but there were issues logging into the site, and staff felt there were functionality issues within the site that made updating it difficult. Transference of skills was not necessarily to the level indicated at the beginning of the programme.

Higher level outcomes

In addition to planned program outputs and outcomes:

- There is a commitment to the development of a National Tourism Masterplan.
- local Municipalities having been encouraged to consider their vision and future plans for tourism that have the potential to drive a strong and focused tourism development program that can be staged over time at both a national and municipal level.
- local municipalities are mobilising to recognise their local sites of significance that can be developed for tourism experience purposes.
- local community members with aspirations in the tourism sector, have collaborated to see benefits of working together.

Program progress and need for continuation

The Activity has delivered outcomes that form a strong springboard for progressing tourism development for Timor-Leste.

In particular, the National Tourism Strategy, municipal tourism aspirations, strong national private sector Associations and communities with an interest in progressing tourism can all align to move towards a stronger and more focused sector.

The work completed in this Activity would complement new work moving forward.

All in country stakeholders expressed support for continued work towards a strong sector and commitment to work together.

Communities were supportive but more formal association will be required as will governance that formalises relationships between government partners.

Support will be required to lift the skills and technical knowledge within MoTE and municipalities, but this support needs to be provided directly in house to ensure long term resilience and sustained skills development.

Impact of ceasing program

If the program were to cease, initiatives that have been implemented may not be continued due to lack of skills/capacity (eg data collection, analysis and use).

Tourism in the local areas of Aileu and Maubisse is unlikely to thrive and some businesses that have been supported may not be viable moving forward without growth.

Cafes and accommodation that have had grant funding need local products, experiences and attractions if they are to thrive to create a reason to come to the region, and to stay longer.

Although it is fair to say that the programmes deliverables have been achieved, there is a capability gap for current businesses operating, and new entrants into the sector that has not been accounted for in the current programme.

Relationship with other donors

The grant programs and donor initiatives described earlier in the report need to be considered in relation to MFAT's tourism support in Timor-Leste. Whilst there is limited investment in tourism currently occurring from other donors apart from the DFAT planning initiative, there is significant opportunity for targeted investment if funding were available.

The programs described have the potential to be directly relevant to the strategic alignment and effectiveness of New Zealand's contributions in the region, particularly in avoiding duplication and enhancing collaboration.

1. Avoiding Duplication and Enhancing Synergy:

- The presence of DFAT's upcoming Tourism Planning Adviser for the Ministry of Tourism in Timor-Leste highlights the need for MFAT to align its activities to complement rather than duplicate existing efforts. MFAT's support should focus on areas not covered by DFAT such as specialised training programs, community-based tourism initiatives, enhancing cultural and heritage tourism experiences, or specific infrastructure projects (Department of Foreign Affairs and

Trade) (Department of Foreign Affairs and Trade).

- The EU's and ADB's grant programs, which often focus on infrastructure and sustainable development, suggest that, when these grants are being offered, MFAT could prioritise funding areas where gaps exist such as cultural tourism, digital marketing strategies, or eco-tourism projects that align with these broader infrastructure efforts.
2. Strategic Collaboration:
 - Given SPTO's role in regional tourism promotion and capacity building, MFAT should consider leveraging SPTO's existing frameworks to amplify its own programs in Timor-Leste. Collaborating on regional initiatives through SPTO could enhance the impact of MFAT's contributions by integrating them into a larger regional strategy that benefits multiple Pacific nations.
 3. Resource Optimisation:
 - The grants provided by other donors may also influence how MFAT allocates its resources. For example, if DFAT and the World Bank are already funding large infrastructure projects, MFAT could focus on software development, such as capacity building, digital tools, and platforms that support these projects' sustainability.

Option of NZ exiting program

To handle an exit from the New Zealand Aid Programme in Timor-Leste, MFAT should prioritise effective handovers and provide transitional support for lasting benefits.

MFAT should identify local NGOs, community groups, and private sector entities to take over projects, ensuring clear documentation and transfer of knowledge and resources. Coordination with other donors and international agencies is crucial to fill gaps and maintain support. Establishing a central coordination point will facilitate communication and resource allocation.

Technical support during the handover, such as advisory roles or consultancy services, can assist local entities in sustaining projects. A post-exit follow-up mechanism including periodic evaluations and networks of trained individuals, will address challenges and ensure ongoing success.

Efficiency and sustainability of program

Impact

In general, the program has achieved good short and potential medium term outcomes and value for money.

The sustainability of the program could have been improved by an alternative model of delivery of some components to better upskill government agencies.

The platform for long term tourism growth has been established through the National Tourism Strategy and, if resources are available to commence implementation through master planning and local municipal engagement, progress will continue.

The adaptive management approach was critical to responding to COVID and still enabling the program to be delivered.

Ongoing and regular communication and co-design with key stakeholders is critical

to the program and could also include municipalities.

Phase Two recommendations and how they were addressed

Continued Support for Tourism Development:

- 2017 Recommendation: Sustain investment in tourism to support economic diversification and community engagement.
- Findings: The tourism program continued with a focus on community-based tourism, capacity building and increased data insights. Progress was made in engaging local communities, developing tourism infrastructure through grants, and enhancing some marketing efforts.

Strengthening Stakeholder Coordination:

- 2017 Recommendation: Improve coordination among donors, government agencies, and local stakeholders to ensure a unified approach.
- Findings: Efforts were made to improve stakeholder coordination. While communication and collaboration have advanced, some gaps remain in government engagement and ownership. Progress has been made, but further efforts are needed for a fully cohesive approach.

Sustainable Business Models:

- 2017 Recommendation: Develop sustainable tourism business models and ensure local capacity building.
- Findings: Training programs and workshops were conducted to build local capacity and promote

sustainable tourism practices, but only with coffee tourism operators and guesthouses. There was a lack of sustainability aspects to the training and grants programmes, and sustainable tourism business models have yet to be developed.

Strategic Marketing and Branding:

- 2017 Recommendation: Revitalise the national tourism brand and engage local voices in promotion.
- Findings: There was limited activity seen in this space. The current brand for Timor-Leste is appropriate and resonates with the destination and target market trends. More could and should be done to lift awareness of the destination and create experiences that bring the brand to life.

Appropriate modalities

Whilst the approach taken has been successful in delivering outcomes, future support needs to have a greater emphasis on capacity building/skills transfer.

Providing technical support in house in MoTE in terms of the various areas of the activity would have longer term benefits than work being done for the MoTE.

Similarly, providing technical assistance to support product, experience and business development in Aileu and Maubisse needs to be provided locally and ongoing rather than intermittent programs. For example, a technical advisor working across the two municipalities/administrative posts could assist the community to identify and progress business concepts, advise on site development and encourage partnerships across the 2 areas as one destination.

Capacity building/training would better use existing in-country institutions rather than in house by the supplier.

By strategically leveraging a combination of modalities including capacity building, public-private partnerships, community-based tourism, financial support, and technical assistance, Timor-Leste will be best placed to build a resilient, inclusive, and sustainable tourism industry that benefits its people and protects its rich cultural and natural heritage.

Activity scope

Realistically, the scope needs to be broad if long term benefits are to be achieved in terms of tourism development for Timor-Leste.

Lessons learned

The redesign of the program in response to COVID was critical and has shown the value in both adaptive management and co-design. With COVID significantly impacting the country, without the pivot that was initiated, the Activity could have failed to deliver any valuable outcomes.

In future designs it will be critical to:

- Put in place safeguards to ensure key stakeholders build capacity through the program to create a resilient and sustainable model moving forward.
- Design the program with a degree of independence from the potential delivery agency to ensure that the program's focus remains on the needs of the sector, rather than being influenced by the agency's specific skills. There is a need for long term donor tourism support programs working together with other donors. This can help to eliminate programme duplication

and help to derive stronger results for tourism within Timor-Leste.

- Further support needs to be effectively integrated into government and industry to ensure sustainability and resilience.

Experience development approach to underpin the brand

Visitor experience development workshops are pivotal in enhancing tourism destinations by equipping stakeholders with the skills and insights needed to create memorable and engaging experiences for visitors.

These workshops focus on understanding visitor needs and expectations, leveraging local culture and natural assets, and integrating sustainable practices to ensure long-term benefits for both the community and the environment.

Participants typically include local business owners, tourism operators, community leaders, and government representatives who collaborate to design and implement strategies that improve the overall visitor journey.

Through interactive sessions, case studies, and hands-on activities, these workshops foster innovation and creativity, empowering participants to craft unique, high-quality experiences that attract and retain tourists, boost local economies, and preserve cultural and natural heritage.

Recommendations

1. Skills and capacity Ministry of Tourism and Environment

To ensure sustainable tourism development in Timor-Leste, it is crucial for the Ministry of Tourism (MoTE) and local municipalities to build their skills and capabilities, allowing them to manage and develop their tourism sector independently. Strengthening governance, establishing robust systems, and fostering public-private partnerships will reduce donor dependency and empower local institutions to meet the needs of both the community and visitors effectively.

A comprehensive review of resource allocation within the Ministry of Tourism is essential to ensure that the Ministry's efforts are fully aligned with the sector's strategic priorities. This realignment will enhance the effectiveness of tourism programs, build the Ministry's capacity to deliver on its mandate, and support the long-term growth and sustainability of tourism in Timor-Leste.

Recommendations:

- 1.1 Review and clearly define roles within MoTE to align with strategic objectives and improve accountability.**
- 1.2 Provide ongoing professional development in project management, tourism marketing, and financial management.**
- 1.3 Create standard operating procedures for critical functions to ensure consistency and efficiency.**

- 1.4 Introduce digital tools and technologies to streamline processes and improve decision-making.**
- 1.5 Facilitate regular forums and partnerships with the private sector to enhance resources and expertise.**
- 1.6 Establish a clear public-private partnership framework to guide collaboration on key projects.**
- 1.7 Improve communication between MoTE and municipalities to align local and national tourism efforts.**
- 1.8 Empower municipalities by decentralising certain tourism management functions, with training and resources.**

2. Private sector development and integration

Enhanced sector integration will drive innovation, improve service quality, and create more cohesive marketing strategies, attracting more visitors and investments. By building a well-coordinated private sector, Timor-Leste can create a dynamic and competitive tourism industry that supports sustainable economic development.

By fostering strong collaboration between the government, private sector, local communities, and international partners, the country can leverage a wide range of expertise and resources. These partnerships will enhance tourism offerings, improve service quality, and create a more attractive destination for visitors. Building robust tourism

relationships ensures a coordinated approach to development, marketing, and sustainability, driving long-term success for Timor-Leste's tourism industry.

Integration is crucial in the context of developing Timor-Leste's tourism sector because it fosters collaboration and coherence among all stakeholders—local institutions, the private sector, government agencies, and communities. By integrating efforts, resources, and expertise, the sector can create a unified approach to tourism development that leverages the strengths of each participant. Integration is key to building a resilient tourism sector that can adapt to challenges, meet the needs of both visitors and the community, and ultimately drive long-term economic growth.

Recommendations:

2.1 Incorporating Private Sector Voices in Policy-Making and Budgeting Processes:

- Establish Regular Consultative Platforms: Recommend the creation of regular consultative forums where private sector stakeholders can actively participate in discussions about policy formulation and budget allocation related to tourism. These forums could include representation from various industry associations, local businesses, and international investors.
- Structured Feedback Mechanism: Suggest implementing a structured mechanism where the private sector can provide feedback on proposed policies and budgetary decisions. This could be facilitated through online portals, surveys, or regular meetings with key government officials.
- Public-Private Partnership (PPP) Framework: Advocate for the

development of a PPP framework (*while being mindful of political space*) that clearly defines the roles and responsibilities of the private sector in tourism development projects, ensuring their input is integral to decision-making processes.

2.2 Enhancing Private Sector Representation in Tourism Governance: Representation on Key Committees: Recommend increasing the number of private sector representatives on key tourism governance bodies such as the Tourism Advisory Board and the Inter-ministerial Commission for Tourism. This could include members from hotel associations, tour operators, and other relevant industry bodies.

- 2.2.1 Rotational Leadership Roles: Propose introducing rotational leadership roles within these bodies to ensure diverse representation from different sectors of the tourism industry, allowing for broader perspectives and innovation.
- 2.2.2 Capacity Building for Private Sector Leaders: Suggest capacity-building programs for private sector leaders to enhance their ability to contribute effectively to governance structures. This could include training in areas such as public policy, strategic planning, and financial management.

2.3 Strengthening Public-Private Collaboration:

- 2.3.1 Joint Strategic Planning Sessions: Recommend organising joint strategic planning sessions between government and private sector stakeholders to align their

objectives and strategies for tourism development.

- **Shared Data and Resources:** Propose creating a shared database where both public and private sectors can access key data on tourism trends, visitor statistics, and economic impact, facilitating more informed decision-making.
- **Collaborative Marketing Campaigns:** Advocate for the development of collaborative marketing campaigns that involve both government and private sector funding and resources, ensuring consistent messaging and broader reach.

2.4 Communication

- **2.4.1** Establish regular forums and networking events to encourage collaboration and knowledge sharing among tourism stakeholders.
- **2.4.2** Implement digital platforms for communication, resource sharing, and collaboration among tourism stakeholders.
- **2.4.3** Establish systems to monitor collaboration effectiveness and gather stakeholder feedback for continuous improvement.

2.5. Capacity building and business development:

- **2.5.1** Provide targeted training and mentorship to local tourism organisations in business management, marketing, and sustainable practices and tour guiding.
- **2.5.2** Develop Public Private Partnership frameworks that clearly define roles and drive joint infrastructure and marketing projects.

- **2.5.3** Provide financial assistance and business development services tailored to small and medium enterprises in the tourism sector.

3. Destination Management Plan

Tourism master planning that is currently proposed by Ministry of Tourism and Environment needs to build on the National Tourism Strategy to create a cohesive and coordinated approach to tourism development, ensuring that all aspects of the industry are aligned with the destination's long-term objectives and deliver on the brand.

This requires a “destination management” approach that engages all relevant stakeholders at national, regional and local level. It will require focus on determining and developing priority destinations, determining the unique experiences that differentiate each destination and addressing the operational and tactical aspects of managing each destination. It will need to address the coordination and management of various elements such as visitor services, attractions, events, transport/access, and accommodation to ensure a high-quality visitor experience while balancing the needs of the local community and environment.

The Destination Management Plan will need to prioritise areas to be developed as the ‘heroes’ to drive brand and national marketing. The optimal approach would be to start with a small number of regions that have the characteristics and some experiences that can drive positioning of Timor Leste for its adventure and culture. Ideally these would be destinations such as Aileu, Maubisse, Atauro Island and others that have made progress in identifying their own aspirations, distinct experiences

and where the tourism sector is working together.

Effective planning at the local level ensures that tourism development aligns with community needs and environmental considerations. By engaging local stakeholders in the planning process, municipalities can create tailored tourism action plans that preserve cultural heritage, protect natural resources, and enhance visitor experiences. Strong local area planning fosters a well-organised and attractive tourism environment, promoting economic development and community well-being.

Recommendations:

- 3.1 Support the development of a national Destination Management Plan (DMP) to provide strategic direction for tourism development using a destination management framework that engages all stakeholders including municipalities and communities. The DMP needs to incorporate action plans that stakeholders commit to for priority destinations.**
- 3.2 For priority destinations identified through the DMP, support further local sustainable destination development and best practice site development**

What is destination management?

Destination Management brings together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination. It is an ongoing process that requires destinations to plan for the future and considers the social, economic, cultural and environmental risks and opportunities. The process of engaging communities, industry and government is critical in this approach.

Every region is different, with unique attributes, assets, challenges and opportunities. There is no 'one-size-fits-all' approach to destination management. Solutions need to be customised for the destination to ensure better value for visitors and residents alike.

Adopting a Destination Management approach enables communities and destinations to respond to changing conditions and determine the type of tourism they would like to have and the benefits they would like to receive, taking an active role in managing these.

4. Visitor site and experience development

Investment in infrastructure improvements is crucial to support tourism growth and enhance visitor experiences.

Tourism asset mapping has assisted in identifying sites across Dili, Aileu and Maubisse and Hatu Builico (Ainaro) that are suited to development to attract visitors. Destination planning will help in prioritising these.

Support for site, product, and business development is crucial for enhancing Timor-Leste's tourism sector. This involves investing in the improvement and maintenance of tourism sites, developing unique and attractive tourism products,

and providing assistance to local businesses to boost their capabilities. By offering financial resources, training, and technical support, Timor-Leste can create high-quality tourism experiences that attract more visitors. Strengthening these areas will drive economic growth, create jobs, and ensure the long-term sustainability of the tourism industry, celebrate Timor Leste's cultural assets and build rural community growth and economic resilience.

Priority should be given to sites that offer potential for authentic cultural and adventurous experiences that deliver on the brand. Examples include: Mount Ramalau and associated regional trekking experiences including the embryonic yet historic La Rende! long distance trail (among others); opportunities for extended stay 'adventure lodges' allowing for hub and spoke excursions in the regions (Maubisse and Hatu Builico as examples); adventure cycling activations including mountain biking and bike packing; canyoning and other river-based activations; the Liberator crash site; voluntourism with a focus on regenerative outcomes; cultural activations in villages including art, coffee and culinary touchpoints; and 'path to independence' historical site storytelling across Portuguese, WW2 and Indonesian occupation eras. Importantly, developing local community workforce capacity to implement management and maintenance of existing and potential infrastructure and sites will be critical to ongoing success.

Collaboration with existing tour operators and private sector suppliers that have the inherent on ground operational and community-based knowledge should also be a central consideration in ongoing development strategies.

A focus on outdoor active 'adventure' tourism would prove a good fit for Timor

Lete's initial regional tourism development as the target market specifically seek a 'raw', often lesser developed embedded experience where the priority focus is on immersive, challenging activities (on a sliding scale), and expectations of extended comforts (i.e. accommodation service levels) are diminished by degrees. This matches the early-phase, often limited delivery capacity of many small, rural communities without reputational risk (i.e. basic amenity is tolerated by the adventure market with positive reputational outcomes while still maintaining a robust approach to health and safety).

Recommendations:

- 4.1 Work with municipalities to plan for development of key sites as vibrant visitor experiences including working with communities to offer interactive experiences at sites where appropriate. Provide professional advice, case studies and mentoring to ensure optimal site development complementing the natural environment.**
- 4.2 Collaborate with existing tour operators and private sector suppliers that have the inherent on ground operational and community-based knowledge to develop new experiences that deliver on the brand.**
- 4.3 Implement an experience development program offered to operators and community members and businesses that have aspirations for tourism to help to identify and progress the best fit for experiences that deliver on Timor Leste brand.**

Creating exceptional visitor sites

Site development to create high quality visitor experiences requires strong and effective planning. Critical considerations include:

Community Engagement and Partnerships

- Collaborating with local communities and other stakeholders to determine how they want a site to be used and any limitations.
- Fostering partnerships for conservation, education and tourism initiatives as well as engaging the community in park planning and decision-making processes.

Infrastructure and Facilities

- Planning and developing essential infrastructure and facilities such as toilets, parking areas, trails, picnic areas, and campgrounds that are sensitive to the natural environment.
- Planning to ensure these facilities are well-maintained and accessible to all visitors, including those with disabilities.

Visitor Experience Design

- Considering opportunities to enhance the visitor experience at the site through interpretive signage, cultural experiences offered by local people and other interactive opportunities.
- Offering small business opportunities such as concessions

for kiosks, cafes or equipment (eg bike, kayak) hire.

Environmental Conservation

- Implementing strategies to protect and conserve natural and cultural resources such as habitat preservation, wildlife management, regulating visitor access to sensitive areas and promoting sustainable practices.

Safety and Security

- Ensuring the safety and security of visitors through well-marked trails, safety information, emergency response plans, and the presence of rangers or similar staff.
- This also includes risk management strategies to address potential hazards such as wildlife encounters, natural disasters, and other emergencies.

5. Business and experience development

Whilst there have been lessons learned from the work to date in Maubisse-Aileu in terms of micro and small business development, new experiences and training/capacity building, there is still work to be done to strengthen the process and deliver stronger outcomes for the people and place of Timor-Leste. This needs to be completed before applying elsewhere in the country.

Working closely between tourism and agriculture has increased the range of opportunities presented through the programme, in particular within the coffee tourism sector.

To advance tourism development and community-based tourism more support is required for municipalities. This support should include capacity-building initiatives, and technical assistance to empower local governments to effectively manage and promote tourism. Strengthening the municipalities' ability to develop and implement tourism projects will ensure that tourism growth is inclusive and benefits local communities. Enhanced municipal support will foster sustainable tourism practices and improve the overall visitor experience, driving economic development and community well-being.

While the unexplored environment, rich cultural heritage and traditions of Timor-Leste offer unique tourism opportunities, there's a need for greater community involvement and benefit-sharing from tourism activities. Efforts must ensure that tourism development respects and preserves local cultures and traditions. Additionally, language barriers and a lack of training in hospitality and customer service

skills limit the potential for local employment in tourism.

The program has helped improve hospitality and some experiences, but priority now should be given to working to develop new and additional experiences that deliver on the brand. Cafes and accommodation also need local products/experiences and attractions to drive visitation if they are to thrive.

Recommendations:

- 5.1 Develop and implement capacity building plans that are relevant to the context and respond to the constraints identified and can be realistically implemented with available technical assistance support. Supporting the work should include a simplified reporting system that provides clear evidence of progress towards targets**
- 5.2 Provide Technical Advisor working in municipal office in Aileu-Maubisse region to work with municipalities, business and community to assist with tourism operator and business experience development and support; new experience and business development; site planning as well as linkages between MoTE and the destination.**
- 5.3 The program should provide seed funding for new experiences and business development with priority to those that can underpin strengthening the brand (e.g. adventure, cultural story telling).**

Culturally Focused Tourism Packages

Culturally relevant tourism experiences are vital for Timor-Leste as they offer a pathway to sustainable economic development while preserving and celebrating the nation's rich cultural heritage. By integrating cultural elements into tourism, Timor-Leste can create unique and authentic experiences that attract visitors seeking meaningful connections with people and place. This approach not only enhances the tourism sector's appeal but also empowers local communities by providing economic opportunities and fostering a sense of pride in their cultural identity.

The Aotearoa, New Zealand Māori tourism model offers a compelling example of how cultural tourism can succeed. Māori tourism experiences have become a significant draw for international visitors, highlighting the rich history, traditions, and values of the Māori people through storytelling, oral traditions, cultural traditions and the delivery of a values based experience. These experiences are carefully designed to be authentic and respectful, ensuring that they benefit both the Māori communities and the broader tourism industry. They are aligned with the values of the people delivering the experience. By engaging local Māori as key stakeholders and leaders in the tourism sector, Aotearoa New Zealand has created a model that promotes cultural preservation and economic growth simultaneously.

Timor-Leste can learn from this model by actively involving local communities in the development and management of culturally focused tourism initiatives. This involvement ensures that tourism

experiences are genuinely representative of Timorese culture and that the benefits are equitably shared among community members. Moreover, cultural tourism can strengthen social cohesion by bringing communities together to celebrate and promote their shared heritage. It can also serve as a platform for cross-cultural understanding and exchange, enriching the experiences of both locals and visitors. Ultimately, embracing culturally relevant tourism can position Timor-Leste as a distinctive and attractive destination on the global tourism map, while safeguarding its cultural legacy for future generations.

1. Collaborate with Local Communities

Developing culturally focused tourism packages in Timor-Leste begins with engaging local stakeholders including community leaders, cultural experts, elders and artisans. By working directly with these groups, tourism operators can identify and showcase unique cultural elements such as traditional dances, music, crafts, and ceremonies where appropriate, and encourage collaborative relationships where these experiences are owned and delivered by the right people in the right place. This collaboration ensures that the cultural experiences offered to tourists are authentic and respectful of local traditions. Active community involvement in planning and delivering tourism packages fosters a sense of ownership, encouraging communities to share their heritage while benefiting economically from tourism.

2. Integrate Cultural Experiences into Adventure Activities

To enrich adventure-based tourism activities, cultural storytelling and local

guides can play a vital role. As tourists hike, dive, or cycle, local guides can share stories, history, and cultural insights, providing context and enhancing the overall experience. Additionally, integrating cultural stops at villages, cultural sites of significance where agreed and appropriate, or events allows tourists to experience the local culture firsthand. By blending cultural experiences with adventure activities, tourists gain a deeper appreciation of Timor-Leste's rich heritage while engaging in their preferred leisure activities.

3. Develop Culturally-Themed Tours

Creating tours that emphasise cultural experiences is another effective strategy. Traditional workshops offer tourists the opportunity to learn skills such as weaving, pottery, or cooking local dishes, allowing for hands-on engagement with the culture. Furthermore, tourism packages can be built around existing cultural festivals or events, offering visitors the chance to participate in and learn from these celebrations. These culturally themed tours not only educate tourists but also help preserve and promote local traditions and practices.

4. Promote Local Art and Craft

Local art and craft are essential components of Timor-Leste's cultural identity, and promoting these through tourism can have significant benefits. Tours can include visits to artisan markets or craft centres where tourists can purchase handmade goods and interact with artisans. Additionally, arranging for tourists to observe or participate in the making of traditional crafts provides an interactive and educational experience. By highlighting local art and craft, tourism packages

support artisans economically and help preserve traditional techniques.

5. Create Educational and Interactive Experiences

Educational and interactive experiences can provide tourists with a deeper understanding of Timor-Leste's cultural heritage. Heritage tours focusing on historical sites can explain their significance and the cultural narratives associated with them. Organising activities such as traditional cooking classes, storytelling sessions, or music lessons allows tourists to engage with the culture in a hands-on way. These experiences foster a greater appreciation for Timor-Leste's cultural diversity and contribute to a more enriching travel experience.

6. Ensure Authenticity and Respect

To maintain authenticity and respect in culturally focused tourism, it is crucial to provide cultural sensitivity training for tour operators and guides. This training ensures that local customs are represented accurately and respectfully, fostering a positive relationship between tourists and the communities they visit. Additionally, designing tourism activities with sustainable practices in mind helps minimise environmental impact and supports the preservation of cultural heritage. By prioritising authenticity and respect, tourism in Timor-Leste can thrive in a way that honours and benefits local communities.

7. Encourage Circular Economies

Culturally relevant tourism experiences can also contribute to the development of circular economies, which support community development across social, cultural, environmental, and economic dimensions. By fostering tourism

practices that prioritise local resources and community participation, Timor-Leste can create sustainable economic cycles that benefit all stakeholders. Circular economies in tourism emphasise the use of local products, services, and talent, ensuring that the economic benefits of tourism remain within the community. This approach not only creates jobs and stimulates local businesses but also reinforces cultural identity by promoting traditional crafts, foods, and customs as integral parts of the tourism experience.

8. Marketing and Promotion

Effective marketing and promotion are essential to attracting tourists interested in culturally focused experiences. Utilising digital marketing and social media platforms allows for targeted marketing efforts that highlight unique cultural experiences available in Timor-Leste. Collaborating with international travel agencies and cultural organisations can also help reach broader audiences interested in cultural tourism. By effectively marketing these packages, Timor-Leste can enhance its visibility as a culturally rich destination and attract tourists seeking meaningful and authentic experiences.

6. Marketing

Without effective marketing the sector will not grow. Marketing needs to be integrated between Ministry of Tourism, Associations and local areas and be aligned to the offer that is currently available to be effective. Integrated and effective marketing is crucial, and this involves creating cohesive marketing strategies that unify the efforts of the government, private sector, and local communities to promote the country's

unique attractions. By leveraging digital platforms, social media, and international partnerships, Timor-Leste can enhance its visibility and appeal to a broader audience. A well-coordinated marketing approach will attract more visitors, boost tourism revenue, and support sustainable economic development.

A strong brand exists in Explore the Undiscovered and should continue to be the focus as this has the potential to differentiate TL from other destinations and is deliverable in this young nation with a rich cultural heritage and stunning natural landscapes. Currently TL is lacking the experiences to underpin this brand and tell the story and this needs to be a priority.

Recommendation:

6.1 Develop a Marketing Strategy that can support positioning and promoting Timor Leste for its brand.

Important considerations in a marketing strategy

A Marketing Strategy is essential for positioning a country through its brand as a desirable travel destination and comprises several critical elements.

Firstly, it requires a deep understanding of target markets, identifying potential visitors' demographics, preferences, and travel behaviours. This insight helps tailor marketing messages and campaigns effectively.

Secondly, the strategy should highlight unique selling propositions (USPs) of the destination such as adventure cultural heritage, natural attractions and exclusive/distinctive experiences that differentiate it from competitors.

Effective branding and storytelling play a vital role in creating a compelling narrative that resonates with potential tourists.

The strategy should integrate digital marketing, social media, and traditional media channels to maximise reach and engagement. Partnerships with travel agencies, airlines, and international trade can enhance promotional efforts and facilitate easier access for travellers.

Lastly, the strategy must include performance metrics and evaluation mechanisms to assess the effectiveness of marketing activities and adapt to changing market dynamics, ensuring sustainable tourism growth and a positive destination image.

Short term strategy

There is a compelling reason to implement a series of interim workshops in Timor-Leste while the Ministry of Foreign Affairs and Trade (MFAT) develops a new program. These workshops are crucial to maintaining the momentum gained by coffee tourism operators and guest houses as well as the progress made with the Ministry of Tourism and Environment and recent training initiatives.

One focus should be enhancing tourism experiences within Timor-Leste focusing on Aileu and Maubisse. It would be beneficial to collaborate with the Department of Foreign Affairs and Trade (DFAT) to bring together Māori and Aboriginal tourism operators to conduct workshops in the region. This collaboration would promote culturally focused, values-based tourism packages that foster meaningful connections and sustainable development.

A second type of workshop could focus on working with municipalities to identify significant sites that can support tourism experience development and storytelling. This initiative would align with the MOTE's aspiration for a Masterplan project which emphasises the need for sustainable tourism growth in Timor-Leste. By collaborating with local communities these workshops can uncover unique cultural, historical, and natural sites that hold potential for tourism. This process not only helps preserve Timor-Leste's rich heritage but also provides opportunities for economic development. The workshops would enable municipalities to actively participate in crafting narratives that resonate with both domestic and international visitors, thereby integrating local perspectives into the broader tourism strategy.

Appendix 1 Stakeholders Consulted

Contact/Attendees
MFAT Abrani Manuel Development Programme Coordinator Nick Borthwick Chargé d'Affaires a.i. First Secretary – Development John Claasen Senior Policy Officer/Development Manager
The Asia Foundation Héctor Salazar Salame Country Representative Heidi Arbuckle Deputy Country Representative Agueda Miranda Program Manager Gobie Rajalingam Program Officer Management Advisor
Associação Café Timor Sr. Afonso de Oliveira Daniel Leong Juscelina Filipe Tony Jape Former Hotels fo Timor-Leste Chairman 2018-2020 Januario Mok Executive Director East Timor Development Agency
Ministry of Tourism and Environment Antonio da Silva – General Director for Tourism Vanella Goncalves – National Director for Marketing and International Relation Elisabeth Florencia Jeronimo – Chief of Department for International Relation
Association of Women Business Owners Bonciana Gorrete Monteiro Vice-President External Relations and Business Promotion Ana Paula Torres Godinho Vice-President of Tourism and Commerce Sandra F. Alves do Rego Vice-President Creative Industry & Social Businesses Mr. Domingos Natividade Executive Director Chamber of Commerce and Industry of Timor-Leste Egidio Purificacao Timor Sightseeing, Director and President of Tour Operator Association Amelia da Costa 2023 National Aeropress Champion Rolls and Bowls Tomas Freitas Director Comrider MTB Adventure – Sam Maddock and Liesl Directors Maddog Adventure – Gil Paulino Dos Santos Oliveira - ND of Art and Culture Secretary of Arts and Culture Mr Osario Head Lecturer Dili Institute of Technology
TradeInvest Roberto Lai – Director of External Relation Duilio Marino Gusmão Araujo – Director of Export and Promotion
Municipality Aileu Office Rogerio da Conceicao – Secretary for Social and Organization Adao Vieira – Chief of Media and Protocol Marcelina Seu Mali Manager Esperanca Sewing Group Maria Diamantina Owner Girasol Coffee Shop Idalia Barbara dos Santos Manager QX guesthouse and restaurant Zevanio Freitas 2022 Brew champion and owner of Aileu Coffeeshop Georgina dos Reis Twin Guesthouse1st Runner Up of 2023 National Aeropress Champhionship

Contact/Attendees
Hugo Trindade Coordinator Projeto Quinta Portugal
Mr. Gonçalo Mendonca President CCITL Municipality Aileu
Administrative Post Maubisse Office
Claudino Mendonca – Former Administrator for Administrative Post Maubisse
Helder Orleans Soares – Chief of Local Services for Community Development
Angelina da Silva Director Maubisse Women Association – Food Processing
Julio Mendonca Martins President Cocamau -Cooperative
Jorge Lopes Coordinator Uma Hakmatek -
Maria Mendonca Manager Sara Restaurant
Cesar Gaio, Owner Dilicious
President Office
Sandra Vieira – Adviser for Arts and Culture
Manuel Mendez Country Director, Conservation International
DFAT
Thomas Wooden – Acting Counsellor Governance, Economic and Rural Development
Makarius Dos Reis - Research Officer
SPTO
Chris Cocker – Chief Executive Officer
Prashil Parkas – Research and Statistics Manager

Appendix 2 Evaluation Design Matrix

Question	Information required	Information source	Method
Objective 1: to assess the extent to which Tourism Development remains a priority for Timor-Leste and the New Zealand International Development Cooperation Programme (Relevance, Coherence)			
Is the Activity design still appropriate for the context?	<p>Changes to Timor Leste economy/tourism sector over activity period</p> <p>Additional policies and strategies that have been approved and released by GoTL since the project implemented?</p>	Published sources	Sector key factors review
How well is NZ partnering with country partners and other actors?	<p>Stakeholder views on partner relations and commitment</p> <p>Discuss other elements of alignment with programs and interventions supported by other donors or other relevant projects funded by DFAT (Ex; USAID's Tourism for All and programs implemented by MDF (Market Development Facility))</p>	Subjective assessment and team evaluation	Stakeholder interviews
How does the Activity align with the new 2023 Resilient Pacific Tourism Donor Options paper?	Assessment of inputs and outcomes and their contribution to RPTDO	Objective assessment	TRC Team evaluation

Question	Information required	Information source	Method
Objective 2: to examine the progress being made in achieving the Activity's outputs and short and medium term outcomes (Effectiveness, Impact)			
1. To what extent is the Activity effectively delivering against New Zealand's international development cooperation policies?	<p>Assessment of all the activities (tasks) completed</p> <p>Did the completion of them make a difference? Is so what was it compared with what was expected to change, the type of change expected and when that change was expected to occur as a result of the project</p>	<p>Available data</p> <p>Assessment of program outputs and outcomes against what was expected to change, the type of change expected and when that change was expected to occur as a result of the project</p>	Desktop assessment and stakeholder interviews
2. Have Activity outputs been of high quality and to cost and time?	Extent to which program outputs aligned with proposed outputs, scope, budget and resources?	Available reports and assessment of outputs	Desktop assessment and stakeholder interviews
3. Have higher level outcomes been achieved	<p>Outcomes beyond those proposed in the activity design</p> <p>To what extent have we contributed towards equipping GoTL to effectively manage Tourism Development Program at national and municipal level</p>	<p>Available data</p> <p>Available reports and assessment of outputs</p>	Desktop assessment and stakeholder interviews

Question	Information required	Information source	Method
Objective 3: : to determine whether sufficient progress has been made to terminate the Activity or whether an extension would be required to ensure more sustainable and lasting outcomes?			
1. Should the Activity be continued beyond 2024?	<p>Rationale for a subsequent phase and evidence it clearly additional to the previous work</p> <p>Need and appetite for continuation with in-country stakeholders</p> <p>Capacity of communities/sector to take on more</p> <p>Appropriate governance and institutional support in place</p>	Assessment by project team in discussion with relevant stakeholders	Stakeholder interviews and TRC Team evaluation
2. How would the beneficiaries and sector fare should the Activity end in 2024?	Gaps in achievement of program outcomes and likely impact of not preceeding	Program outcomes and outputs data plus assessment by project team in discussion with relevant stakeholders	Stakeholder interviews and TRC Team evaluation
3. How does New Zealand's support complement and sync with support from other donors and development partners?	Other programs, activites and proposed outcomes planned for next 3 years and extent to which they complement, compete or replace any suggested MFAT program activities	Program outcomes and outputs data plus sssessment by project team in discussion with relevant stakeholders	Desktop assessment and stakeholder interviews
4. How can MFAT responsibly exit and ensure lasting benefits?			

Question	Information required	Information source	Method
Objective 4: : to review the value of the approach taken in the Activity (Efficiency, Sustainability)			
1. Has the Activity achieved lasting impact and good value for money	Extent to which: <ul style="list-style-type: none"> program outcomes aligned with proposed outcomes, outputs delivered outcomes 	Available data Available reports and assessment of outputs	Desktop assessment and stakeholder interviews
2. Was the adaptive management approach beneficial?	Response and action taken following mid term program assessments	Program outcomes and outputs data	Desktop assessment and stakeholder interviews
3. To what extent has Phase 2 addressed the recommendations from the 2017 review?	Assessment of program deliverables against recommendations in 2017 review	Available data 2017 recommendations Assessment of outputs	Desktop assessment and stakeholder interviews
4. What modality or modalities best suit Timor-Leste?	Assessment of activities completed and not complete and modalities Assessment of what has worked well and what has not	Available data Assessment of outputs	Desktop assessment and discussions
5. Is the Activity focusing on the outcomes? Is the scope too broad?	Analysis of outcomes achieved and contributing activities	Program outcomes and outputs data	Desktop assessment and stakeholder interviews

Question	Information required	Information source	Method
Objective 5: : <i>Lessons learned for improvement</i> – to identify the key learnings to increase positive impact in the future for this Activity and other tourism initiatives.			
1. To what extent has COVID impacted on activity delivery, and what learnings have there been from the COVID period?	Assessment of activities completed and not complete and impact of covid	Available data Available reports and assessment of outputs	Desktop assessment and stakeholder interviews
2. What do we need to change in any future design and delivery?	Analysis of evaluation activities	All reporting and assessment during evaluation project	TRC assessment plus stakeholder inputs

Appendix 3 Quantitative data (supplied by TAF)

I. Visitor Numbers to and Spending in Aileu and Maubisse

It is not possible to provide precise numbers of visitors to or visitor expenditure in the Aileu and Maubisse region given available administrative and program data. However, the International Visitors Survey (IVS) conducted by the Asia Foundation since 2015 and client tracking of TDP grantees in the region offer insights. Each is discussed in turn.

International Visitors Survey

Table 1 reflects the number of IVS respondents from 2015-2022 (2023 data is still being finalized) that reported having visited Dili and the Aileu and Maubisse region (the region), and their average and median expenditure.

There are important limitations to relying on IVS data to ascertain the number of

visitors to the region. First, since IVS is designed to capture information from international visitors, it does not include domestic visitors or their expenditure in the region. Second, IVS data is collected during a set period and does not reflect overall numbers for the entire year. Third, IVS does not breakout Maubisse from other locations in the municipality of Ainaro, where the city is located. Fourth, IVS visitor data at the municipal level is influenced and can vary widely based on special events that may take place each year. For example, compared to previous years, there was a roughly ten-fold increase in IVS respondents reporting they had visited Aileu in 2022. This is likely due to a large-scale celebration organized by the Government of Timor-Leste in Aileu in the fourth quarter of that year. Fifth, expenditure data per municipality may include associated costs to reach the location (e.g., car hire/rental in Dili).

TABLE 1: VISITORS TO AND SPENDING IN DILI, AILEU AND AINARO
International Visitor Survey

Municipality			Year							Avg 15-19	Avg 20-22
			2015	2017	2018	2019	2020	2021	2022		
			n=636**	n=322**	n=303**	n=636**	n=522**	n=425**	n=674**		
Ainaro (including Hato Builico, Mt. Ramelau, Maubisse)	Visitor Numbers	%*	10%	23%	45%	12%	9%	10%	6%		
		#	63	21	46	76	49	44	40		
	Expenditure	Mean	\$321.60	\$350.38	\$223.96	\$317.45	\$230.90	\$469.50	\$400.08	\$303.35	\$366.83
		Median	\$171.00	\$247.00	\$143.00	\$107.00	\$132.00	\$206.50	\$174.00	\$167.00	\$170.83
Aileu	Visitor Numbers	%*	5%	20%	9%	8%	8%	7%	40%		
		#	32	18	27	54	40	29	43		
	Expenditure	Mean	\$175.34	\$295.44	\$101.85	\$172.07	\$131.85	\$422.45	\$382.49	\$186.18	\$312.26
		Median	\$52.50	\$105.00	\$70.00	\$77.50	\$63.00	\$100.00	\$150.00	\$76.25	\$104.33
Dili***	Visitor Numbers	%*	63%	60%	67%	63%	24%	53%	77%		
		#	402	193	202	398	124	224	518		
	Expenditure	Mean	\$212.86	\$332.87	\$187.00	\$140.37	\$179.81	\$503.45	\$281.48	\$218.28	\$321.58
		Median	\$115.00	\$205.00	\$87.00	\$53.00	\$57.50	\$150.50	\$115.00	\$115.00	\$107.67

*Indicates the percentage of survey respondents

** Total IVS sample size

*** While most visitors arrive in Timor-Leste via Dili, IVS data only reflects their stay in Dili if it included leisure activities.

Grantee Clients

TDP has provided grants to thirteen businesses in the Aileu and Maubisse region. The program has tracked the number of clients/visitors to each business since their respective grant began. Table 2 reflects these numbers. N/A is utilized to indicate in the table where data was not collected as a grant had not yet started or concluded. Past and current grantees are still in the process of submitting quarter 1 2024 data.

Per the section below there are over 50 businesses in the region. As such, client numbers for these thirteen businesses do not reflect the entirety of visitors to the region. They do, however, reflect an upward trend and that a minimum close to 700 people are visiting the region yearly. Also note that increased competition in the region is also a factor in client visits. For example, Girasol Café reports that their clients between 2022 and 2023 decreased as more cafes opened in the area.

TABLE 2: GRANTEE CLIENT NUMBERS IN AILEU AND MAUBISSE
Aileu

No	Grantee	Grant Start	Grant Completion	Clients			
				2021	2022	2023	2024 Q1
1	Esperansa Sewing Group	2020	2020	25	50	50	
2	Girasol Cafe	2021	2021	125	450	300	125
3	Maddog Adventures	2022	2022	N/A	N/A	37	
4	Dili Vanili	2022	2022	N/A	100	180	
5	ACT - Assosisaun Cafe Timor by RNB	2022	2023	25	37	68	
6	Comrider MTB Adventure	2023	2023	N/A	N/A	7	
7	Naterra & JUTAET	2024	2024	N/A	25	24	
8	Timor Sightseeing Tour & Travel	2023	2024	N/A	N/A	N/A	15
9	QX	2023	2024	N/A	N/A	N/A	
	Total			175	662	666	140

Maubisse

No	Grantee	Grant Start	Completion Year	Clients			
				2021	2022	2023	2024 Q1
1	Hano in ba Oin	2021	2021	13	25	32	
2	Comrider MTB Adventure	2023	2023	N/A	N/A	N/A	8
3	COCAMAU (and ACT) - Maubisse Coffee Eperiences - Rebutelu Capture Maubisse	2022	2023	N/A	N/A	32	
4	Timor Sightseeing Tour & Travel	2023	2024	N/A	N/A	N/A	15
5	Sara Unip. Lda	2023	2024	N/A	N/A	N/A	
	Total			13	25	64	23

II. Number of tourism businesses of different scale and type pre 2018 and current

TDP conducted a detailed mapping of tourism assets in the Aileu and Maubisse region between 2019-2020. Over the life of the program, TDP has tracked the tourism-business landscape in the region. The numbers of businesses have undergone changes, influenced by various factors such as the COVID-19 pandemic and the floods in 2021. Despite these challenges, most businesses have shown resilience to these disruptions, highlighting the dynamic nature of the tourism industry in both Aileu and Maubisse, with new businesses opening, existing ones evolving, and collaborative efforts driving innovation. A comprehensive list of tourism-related businesses in Aileu and Maubisse is included as an attachment to this document and details regarding business numbers in each location follow.

Aileu

In Aileu, the 2020 mapping identified a total of 34 tourism businesses, 27 of which continue to operate. Since then, there has been significant growth, with an additional 18 establishments opening, bringing the total to 45. Among these, six were already estimated to be in operation before 2020, while 12 have emerged between 2020 and 2024. See Table 3 below.

TABLE 3: BUSINESSES IN AILEU

Aileu	
34	Business mapped in 2020
18	Additional businesses since 2020 mapping
6	Est. before 2020
12	Est. between 2020 and 2024
27	Business mapped in 2020 and still active
18	New Businesses since 2020 mapping and still active
45	Total Active Businesses in 2024
7	Businesses mapped in 2020 and no longer active

Additionally, five project grantees have collaborated to develop niche tourism products and experiences, further enhancing the tourism landscape in Aileu.

Maubise

Moving on to Maubisse, in 2019, the TDP mapping exercise identified eleven tourism businesses. Among these, nine businesses remain active, while two ceased operations. Thirteen new tourism-related businesses emerged since 2020, bringing the total count to 21. See Table four below.

TABLE 4: BUSINESSES IN MAUBISSE

Maubisse	
11	Business mapped in 2019
13	Additional businesses since 2019 mapping
9	Business mapped in 2019 and still active
13	New Businesses since 2020 mapping and still active
22	Total of Active Businesses in 2024
2	Businesses Captured in 2019 Mapping no longer Active

Furthermore, like Aileu, three businesses from Maubisse are project grantees that have collaborated to develop niche tourism products and experiences in Maubisse, adding to the diversity of offerings in the area.

III. TDP Training initiatives

To date, TDP has organized 33 training sessions, offering 21 distinct types of training in Dili, Aileu, and Maubisse. A complete list of trainings and topic are included in Table 5 below. TDP's training model takes a specialized approach tailored to specific roles or responsibilities within the participating organizations. In total 441 participants attended the trainings, consisting of 299 women, 142 men. Despite the absence of data regarding Persons with Disabilities (PWD), the project remains committed to ensuring inclusive engagement.

TABLE 5: TDP TRAININGS

Nu	Training	Unique	Year	Region	Participants			Total
					M	F	PWD	
1	Basic coffee skill training	1	2020	☐ Aileu	2	4	0	6
2	Basic coffee skill training		2020	☐ Maubisse	1	5	0	6
3	IPC Training - COVID (TOT)	1	2020	☐ Dili	3	6	0	9
4	IPC Training - COVID to HOTL Members	1	2020	☐ Dili	7	8	0	15
5	Digital Boothcamp (Training and workshop on National Website)	1	2020	☐ Dili	4	2	0	6
6	Hospitality training	1	2021	☐ Maubisse	2	5	0	7
7	Hospitality training		2021	☐ Aileu		8	0	8
8	Social Media Marketing - Facebook Page training	1	2021	☐ Aileu	5	3	0	8
9	Social Media Marketing - Facebook Page training		2021	☐ Maubisse	7	4	0	11
10	Coffee exchange internship training	1	2021	☐ Dili		8	0	8
11	Content Development Training to Industry Association (ACT)	1	2021	☐ Dili		3		3
12	Financial training - Book keeping	1	2022	☐ Aileu	1	6	0	7
13	IPC training (Preparedness for the NewNormal in the Hospitality and Services Industry)	1	2022	☐ Dili	25	40	0	65
14	IPC training (Preparedness for the NewNormal in the Hospitality and Services Industry)		2022	☐ Aileu	1	7	0	8
15	Social Media Marketing - Facebook Page training (How to create content)	1	2022	☐ Aileu	2	7	0	9
16	Business Managment training - Financial Literacy	1	2022	☐ Aileu		12	0	12
17	Business Managment training - Financial Literacy		2022	☐ Maubisse	1	10	0	11
18	Coffee brewing training	1	2023	☐ Aileu	5	13	0	18
19	Coffee brewing training		2023	☐ Maubisse	3	9	0	12
20	Gender Leadership training	1	2023	☐ Aileu	7	11	0	18
21	Gender Leadership training		2023	☐ Maubisse	6	8	0	14
22	Tour guide skill training	1	2023	☐ Maubisse	8	3	0	11
23	Tour guide skill training	1	2023	☐ Aileu	7	8	0	15
24	Business Managment training - Hotel fundamentals	1	2023	☐ Dili	6	26	0	32
25	Food Safety training	1	2023	☐ Dili	12	21	0	33
26	Food Safety training		2023	☐ Aileu	2	11	0	13
27	Industry specific training - Hospitality skills practice (Camea)	1	2023	☐ Dili	3	12	0	15
28	SCA training - Coffee brew fundamentals (Training of Trainers)	1	2023	☐ Dili	1	1	0	2
29	Coffee re-fresher training	1	2023	☐ Aileu	3	14	0	17
30	Coffee re-fresher training		2023	☐ Maubisse	3	9	0	12
31	SCA training - Coffee brew fundamentals (Training of Trainers)		2024	☐ Dili	1	2	0	3
32	Coffee re-fresher training	1	2024	☐ Maubisse	5	4	0	9
33	Coffee re-fresher training		2024	☐ Aileu	9	9	0	18
Total		22			142	299	0	441

Attachment:

Excel workbook with the following worksheets:

1. Visitor and Expenditure Data (Tables 1 and 2).
2. Tourism Businesses List in Aileu (Table 3)
3. Tourism Businesses List in Maubisse (Table 4)
4. TDP Trainings (Table 5)
5. List of and contact information for key stakeholders.

