



**Sri Lanka Tourism Development Authority**

# **Report on the Marine Tourism Roadmap for Sri Lanka**

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## **Disclaimer**

This document has been developed based on an extensive process of stakeholder consultations, facilitated with the guidance and support from the Consultant, and reflects the combined inputs from various contributors and the Marine Tourism Steering Committee. It was developed for the Sri Lanka Tourism Development Authority (SLTDA) as part of ADB's ongoing Technical Assistance project TA9881: Supporting Tourism Resilience.

The contents of this document have been reviewed and validated by the Marine Tourism Steering Committee to ensure it accurately represents the perspectives and objectives of the collective parties involved.

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## **Overview**

This final report aims to provide an overview of insights and recommendations to support the growth of the host destinations' marine tourism industry, establishing their respective reputations as quality tourism destinations that are capable of attracting luxury-minded and high-spending tourists. Recommendations incorporate the values of environmental, social, and economic sustainability, firstly, due to the importance of securing each destination's marine assets, their most valuable tourism draw, and secondly, based on the growing demand for sustainable tourism in Sri Lanka and around the world.

Interactions with marine biodiversity, wildlife sightseeing, cruise tourism, energy, and fuel sourcing, and other activities have, where applicable, been recommended to assess the practices, technological applications, and management tied to their operations to not compromise the integrity of the marine environment.

By incorporating these actionable steps into practice, Kalpitiya, Galle, and Trincomalee will be able to develop their marine tourism offering into one that is sustainable, reputable, and distinct, generating a full tourism recovery and then some. Differing from the destinations in Scope 1, the Scope 2 destinations of Jaffna, Mannar, and the North-eastern coastal belt, with lesser-developed tourism industries aspire to lay the framework for the creation of foundational tourism products and the introduction of basic infrastructure for the continued development of the marine tourism industry.

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## Introduction

The following Marine Tourism Roadmap provides an overview of the key takeaways presented in each of the full reports that were submitted to the Asian Development Bank for the scope of this project titled “TA-9881 SRI: Supporting Tourism Resilience”. This report was produced under the advice and support of the ADB local team and supporting mission alongside and for the use of the Sri Lankan Tourism Development Authority (SLTDA) and Ministry of Tourism (MoT) of Sri Lanka.

This report directly corresponds to Deliverable 7: Marine Tourism Roadmap, consisting of a presentation summarizing each recommendation. This report, Deliverable 8, elaborates on these initial recommendations, providing further context and reasoning behind each suggestion and recommended implementation time-frame. The roadmap functions to inform the next steps of marine tourism development and should be considered as a guideline to steer future policies, regulations, strategic investment and capacity building.

The following report compilation underlines the main findings from each deliverable supported by actionable steps in the form of Short-term, Medium-term, and long-term recommendations. For each of the six target destinations, Kalpitiya, Galle, Trincomalee, Jaffna, Mannar, and the North-eastern coastal belt, suggestions have been developed for the categories of “zonation,” “conservation,” “infrastructure,” “tourism anchor product,” in addition to general considerations.

Additional recommendations have been added per destination to mitigate seasonality in view of Sri Lanka’s vision of becoming a year-round destination capable of attracting high value tourists. Alternative tourism products have been suggested to diversify each destination’s tourism offering and enable the economic benefits generated from tourism to reach local host communities. Sources have been attributed for each recommendation as a hyperlinked source, attributed to by a stakeholder or through the designation of “empirical findings”. Intricate sourcing has been included for each recommendation to affirm the legitimacy and basis from which suggestions were formed.

For consistency, the following Marine Tourism Roadmap has been subdivided into sections, one for each of the six target destinations, Kalpitiya, Galle, Trincomalee, Jaffna, Mannar, and the North-eastern coastal belt. As Deliverables 1 (Inception Report) and 2 (Market Research) were submitted based on background information and literature reviews conducted prior to on-site visits and consultations, these foundational reports have been omitted from this cumulative stakeholder-validated report.

While both Deliverables 1 and 2 provide important context that was used to inform each recommendation, the deliverables included in this report Deliverables 3, 4, 5, 6, and 7 were assessed, validated, and adapted based on ADB feedback, multiple stakeholder revision rounds, and empirical findings. Scope 1 of this project, which covered the destinations of Kalpitiya, Galle, and Trincomalee, constituted the first submission of this Deliverable (full report), forming a basis for the elaboration of Scope 2, covering the target destinations of Jaffna, Mannar, and the North-eastern coastal belt in the Northern Province.



## Whole Destination

The Sri Lankan Government initially identified three coastal destinations (Kalpitiya, Galle, and Trincomalee) as key areas able to transform Sri Lanka's marine tourism offering and stimulate a full recovery post-pandemic. Additional sites, Jaffna, Mannar, and the North-eastern coastal belt, have also been given the designation as high-potential tourism destinations for their marine assets, unique marine and coastal biodiversity, and heritage sites. Collectively, Scope 1 and 2 underline the entirety of the main coastal destinations present along Sri Lanka's coastline, providing a comprehensive view of the country's current marine tourism offering.

In view of using marine tourism as a vector for economic recovery, the project scope covers each target destination's marine tourism potential given Sri Lanka's overarching tourism goals. Sri Lanka, as a whole destination, is included with general recommendations to guide a cohesive pathway forward in national guidelines, policies, and standards. While outside of this scope, importance is given to national marine tourism strategies, and specifically protections, to reinforce destination-specific planning and management moving forward. As a result, the Marine Tourism Roadmap additionally highlights recommendations for Sri Lanka as a whole destination, paying particular attention to the island nation's spatial and zonation plans, conservation requirements, infrastructure developments, tourism anchor products, and prospective tourism development.

Over 66% of all tourist arrivals to Sri Lanka are estimated to visit at least one of the Scope 1 target destinations throughout their trip, demonstrated in the chart below. Given that this rate does not change significantly over the following 5 years, by 2027, more than 2 million tourists will be visiting these locations (according to the baseline scenario). To put this in perspective, there have been 900,000 arrivals between the period of January and August 2023 according to SLTDA<sup>1</sup>, signifying that the uptick in visitors to these areas alone will be substantial. With this in mind, the following sections underline how tourism development could meet the demands of diverse, dynamic, and luxury-minded tourism markets. Knowing that such an uptick in arrivals to these destinations will have an impact on the carrying capacity in its current form, strategies have aimed to prepare the industry to curb its impacts to avoid overburdening destinations by mitigating seasonality.

The table below shows the detailed forecast of the number of tourists visiting each location.

	Pessimistic Scenario			Base Scenario			Optimistic Scenario		
	Kalpitiya	Galle	Trincomalee	Kalpitiya	Galle	Trincomalee	Kalpitiya	Galle	Trincomalee
2023	24.7	525.0	163.2	33.0	701.9	218.2	46.0	977.0	303.7
2024	35.2	748.6	232.7	47.0	998.5	310.4	57.5	1,223.1	380.2
2025	38.7	823.5	256.0	50.8	1,079.9	335.7	62.0	1,318.5	409.9
2026	46.7	992.0	308.3	61.0	1,296.8	403.1	71.0	1,508.8	469.0
2027	54.0	1,147.1	356.6	70.3	1,494.3	464.5	79.3	1,685.5	523.9

Note: Data is given in thousands.

Source: Sri Lanka Tourism Development Authority (SLTDA), SavvY

The Northern Province destinations featured in Scope 2, Jaffna, Mannar, and the North-eastern coastal belt, are home to lesser developed tourism industries with limited information available on visitor arrival data and travel preferences. Therefore, on-site visits and stakeholder consultations provide pivotal insights, which were employed to shape the understanding of the area's biggest potential for marine tourism development.

<sup>1</sup> 2023: Over 900,000 foreign tourist arrivals upto August. (2023, September). The Island Online. <https://island.lk/2023-over-900000-for-foreign-tourist-arrivals-upto-august/#:~:text=The%20Sri%20Lanka%20Tourism%20Development,August%202023%2C%20the%20SLTDA%20said.>



According to stakeholders, the majority of tourists coming to the Northern Province are domestic, with a growing subset of tourists coming from India as a result of increased accessibility to the region. The resumption of flights between Jaffna and India coupled with cruise liners and ferries transporting passengers, has played a key role in reinvigorating tourism development post-pandemic. The new cultural and economic ties forged between India and Sri Lanka demonstrate that apart from tourism, the ties between the two countries are only expected to grow with increased tourism arrivals anticipated to follow.

The recommendations included in this marine tourism roadmap look to enhance the Northern Province's tourism competitiveness by cultivating its natural assets into sustainable and inclusive small-scale tourism attractions, products, and services.

### **Deliverable 3: Spatial and Zonation Plans**

Sri Lanka has previously used zonation and spatial plans to protect the health of marine biodiversity through regulations, policies, guidelines, and the designation of marine protected areas. While comprehensive and far-reaching, shortcomings in planning, implementation, and management have limited their effectiveness, leading to gaps in the current approach.

Deliverable 3 focuses on where efforts have fallen short of preventing harm to the marine environment and tourism industry as a result of unsustainable development and other harmful practices. Recommendations in the upcoming section outline the overarching gaps and recurring challenges concerning Sri Lanka's tourism-specific zonation and spatial planning; these challenges are destination-wide, and suggestions are nation-wide rather than specific for each of the three target destinations.

#### **Zonation recommendation**

##### **Short-term**

**Conservation-oriented planning and zoning measures.** All development will need to prioritize the conservation of marine species and coastal biodiversity to avoid causing harm to the marine environment. Coastal considerations will need to be made to mitigate the impacts of erosion and sea level rise in areas with high tourist concentrations and tourism businesses (accommodations, restaurants, tourism service providers). This can be done by employing nature-based solutions and enforcing compliance with regulations for the construction of tourism accommodations and tourism activities. (Coast Conservation & Coastal Resource Management Act No 57 of 1980<sup>2</sup> as amended by Act No 64 of 1988<sup>3</sup> and Act No 49 of 2011<sup>4</sup>, supported by the establishment of the Coastal Zone and Coastal Resource Management Department (CZCRMP))<sup>5</sup>.

**Implement a streamlined and transparent permitting process and post-project monitoring system.** Tourism stakeholders have voiced that the permitting process for tourism activities should be more transparent and streamlined, as some stakeholders consider the current process to be complex and lacking transparency. This should be supported with designating a dedicated assistance contact to support the process and answer questions in an orderly and timely fashion. (Empirical Findings and Governance Performance in Integrated Coastal Management, Sri Lanka Country Report<sup>6</sup>)

**Eliminate informal approval channels related to tourism development.** Informal approvals allow for unsustainable development to continue, causing harm to areas already facing challenges from development-

<sup>2</sup> Act No. 47 of 1980. (1980). *Central Environmental Authority*. <https://www.cea.lk/web/images/pdf/acts/act47-80.pdf>

<sup>3</sup> Coast Conservation (Amendment) Act No 64 of 1988. (1988). *Parliament of the Democratic Socialist Republic of Sri Lanka*. [http://citizenslanka.org/wp-content/uploads/2016/02/Coast-Conservation\\_-\\_Amendment\\_-\\_Act-No-64-of-1988-E.pdf](http://citizenslanka.org/wp-content/uploads/2016/02/Coast-Conservation_-_Amendment_-_Act-No-64-of-1988-E.pdf)

<sup>4</sup> Coast Conservation (Amendment) 1 Act, No. 49 of 2011. (n.d.). *Parliament of the Democratic Socialist Republic of Sri Lanka*. [https://www.srilankalaw.lk/YearWisePdf/2011/COAST\\_CONSERVATION\\_\(AMENDMENT\)\\_ACT,\\_NO\\_49\\_OF\\_2011.pdf](https://www.srilankalaw.lk/YearWisePdf/2011/COAST_CONSERVATION_(AMENDMENT)_ACT,_NO_49_OF_2011.pdf)

<sup>5</sup> Coast Conservation & Coastal Resource Management Department. (n.d.). <https://www.coastal.gov.lk/index.php?lang=en>

<sup>6</sup> De Silva, S., Sellamuttu, S. S., Kodituwakku, D. C., & Atapattu, S. (2011). *Governance Performance in Integrated Coastal Management: Sri Lanka Country Report*. IUCN (International Union for Conservation of Nature) Sri Lanka Country Office. <https://publications.iwmi.org/pdf/H044787.pdf>

related erosion. Hence, closing such channels is essential to regulate and enhance compliance with the law, which will also reduce corruption. Formalization of such channels will also help prevent challenges stemming from the placement of unauthorized structures. (Consultation with informal sector stakeholders in Hikkaduwa, Conservation officer in Trincomalee)

**Clamping down on the unregulated tourism sector.** The unregulated tourism sector poses a significant risk to the environmental integrity of marine and coastal landscapes and biodiversity, not on top of tourist health and safety. Unregulated and “unregistered” tourism businesses often do not abide by international standards, regulations, or other ticketing/ crowd control systems, causing unsustainable behaviours to continue without adequate consequences to prevent them from reoccurring. This leaves a sizable gap in the industry’s understanding and quantification of visitation numbers/valuation of tourism sites. Informal tourism businesses are left unaccounted for and, by being “off the record,” are unable to receive training and capacity support or other opportunities to enhance their own competitiveness. (Empirical findings from site visit, Consultations during group high-level meeting with marine stakeholders in Trincomalee, consultation with Kitesurfing Sri Lanka & Vayu Resort in Kalpitiya)

**Counter-erosion techniques.** Tourism businesses along the coastline are losing their beach-front at an alarming rate. Therefore, it is recommended that the CCD increase support for counter-erosion techniques that apply to coastal tourism businesses. This could include increased human capacity to conduct studies (feasibility and environmental impact assessments) on the placement of hard physical structures such as breakwaters, enhanced implementation of soft measures (sandbags), and emergency support. Additional human and financial capacity to support businesses facing imminent erosion risks and water inundation is also recommended. (Consultations with CCD, tourism stakeholders at Mawella beach, Sri Lanka Coastal Zone and Coastal Resource Management Plan - 2018<sup>7</sup>)

**Assess and manage development that has occurred outside of tourism zones.** Many stakeholders and organizations confirmed that tourism development is happening outside of the tourism development zone. Development outside of the designated zone continues to create land use disputes and other tensions in residential and other areas designated for purposes other than tourism. Therefore, an assessment on where tourism development has taken place outside of tourism zones should assess, determine and address the challenges these businesses now face. Using this assessment, regulations and measures can then be implemented to prevent future development from happening outside designated tourism zones. (Consultation meeting with the Divisional secretary and conservation officer in a high-level marine stakeholder meeting in Trincomalee).

#### *Medium-term*

**Develop hard infrastructure for waste management processing.** Combating plastic pollution and other forms of waste is critical for Sri Lanka’s marine tourism competitiveness, as clean beaches and coastal areas are key to drawing tourists to the area. On top of hard waste infrastructure (waste bins, waste separation), a waste management plan is also required to avoid overflowing and pollution entering adjacent areas. (Consultations with Institute of Ocean Resources Analysis, Cinnamon Hotels & Activity Service Providers in Hikkaduwa, CCD)

**Designate additional Marine Protected Areas in target destinations.** Marine Protected Areas should be added to protect vulnerable marine species in environmentally sensitive areas. Areas must be protected first before activities can sustainably take place. For existing MPAs, additional regulations and enforcement mechanisms should be added to improve their efficacy. (Consultation with Ministry of the Environment, Western Indian Ocean Marine Protected Areas Network<sup>8</sup>)

**Implement regulations and enforcement measures to protect and enforce MPAs.** Out of the MPAs in Sri Lanka, only seven<sup>9</sup> are considered effective due to the lack of regulations being enforced in these areas.

<sup>7</sup> Sri Lanka Coastal Zone and Coastal Resource Management Plan - 2018: Prepared under Section 12(1) of the Coast Conservation and Coastal Resource Management Act, No. 57 of 1981. (2018). Ministry of Mahaweli development and environment,. <https://faolex.fao.org/docs/pdf/srl183110.pdf>

<sup>8</sup> Ridmi. (2021, November 12). Roar Media Archive - Roar Media Archive - Are ‘Marine Protected Areas’ helping Sri Lanka protect ocean. Roar Media Archive. <https://archive.roar.media/english/life/environment-wildlife/are-marine-protected-areas-helping-sri-lanka-protect-ocean-habitats>

<sup>9</sup> Ibid.

Budget constraints and lack of awareness amongst community members on the value of MPAs have only compounded the issue. Therefore, stricter enforcement, targeted funding, and community awareness programs could also help render existing MPAs more effective. For some MPAs, it may be necessary to close environmentally sensitive areas off to tourists until biodiversity regenerates to the desired levels. After regeneration has been achieved, a reopening plan with supporting regulations, policies and tourism development plans can be put into place to conserve biodiversity, while still allowing tourists to responsibly visit such areas under supervision. (Empirical findings, Consultation with CCD, Stakeholder recommendation)

#### *Long-term*

**Create a comprehensive environmental inventory mapping to understand adverse environmental risk better and create a strategic preventative plan.** Having a comprehensive understanding of the species in the area and the impact that development has on behavioural patterns and species' overall health is essential for marine conservation. It is suggested to commission a comprehensive environmental inventory mapping to gain a deeper understanding of the marine biodiversity and their potential vulnerabilities in each of the target areas. (Empirical findings, gap identified by research, backed up by consultation with Ministry of the Environment)

**Establish a monitoring and evaluation process to track the health of marine assets and assess the impact of tourism activities on the marine ecosystem.** Marine biodiversity health should be assessed throughout different stages of development to determine if there is any deterioration in the quantity, quality, or behavioural patterns of species. In doing so, adjustments can be made to avoid causing further harm. This can be done by issuing a baseline assessment of the health of the area side by side with the environmental inventory mapping. Drones or other technology should be used to monitor biodiversity and aid this process. (Consultations with the Sri Lanka Port Authority, Wildlife Conservation Department DWC)

**Implement a disaster risk management policy tailored for coastal areas to mitigate potential risks and ensure the resilience of the region.** Sri Lanka's coastal areas are disaster-prone and at risk of flooding due to the impacts of climate change. Therefore, a disaster risk management plan (DRM) should be developed to mitigate the impacts of climate change (rising tides, extreme weather, stronger storms) to protect tourism assets such as coastal hotels. A DRM plan should prioritize timely mitigation actions with a particular focus on lowering carbon emissions within the tourism and transport sectors. Climate change adaptation such as mangrove planting projects and other nature based solutions should be employed to combat sea level rise and sequester carbon. Considering that climate change will only continue to increase the challenges facing Sri Lanka's coastal destinations, it is imperative that a plan address existing climate-related difficulties that put tourism assets at risk. (Consultations with the CCD, Sri Lanka Coastal Zone and Coastal Resource Management Plan - 2018<sup>10</sup>, National Physical Planning Policy & the Plan – 2048<sup>11</sup>)

### Conservation Management Recommendation

#### *Short-term*

**Improve efforts to catch and prosecute those engaged in dynamite fishing, enforcing harsher punishments.** Dynamite fishing as an illegal practice threatens the survival of the diving and fishery sectors. Therefore, additionally enforcement efforts and harsher punishments must be used to immediately stop this practice from occurring. Jail sentences, for example, should be longer, fines should be higher, and support should be given to transport eyewitnesses to trials to allow them to testify and help prosecute dynamite fishing offenses. (Consultations with CCD, Water Sports Association representative in Bentota, Department of Coast Guard, and Diving Guru in Trincomalee)

**Foster stakeholder collaboration to address pollution, implement effective waste management, and promote sustainable solutions.** There is a need to establish a plastic waste coalition or other collective to unite stakeholders to combat plastic and other forms of waste on beaches. (Consultations with SLTDA)

<sup>10</sup> Sri Lanka Coastal Zone and Coastal Resource Management Plan - 2018: Prepared under Section 12(1) of the Coast Conservation and Coastal Resource Management Act, No. 57 of 1981. (2018). Ministry of Mahaweli development and environment., <https://faolex.fao.org/docs/pdf/srl183110.pdf>

<sup>11</sup> National Physical Planning Department & Ministry of Urban Development & Housing. (2023). National Physical Planning Policy & the Plan – 2048.

**Demarcate zones for tourism purposes and fishing activities to enhance coordination.** The current overlapping of zones has caused disagreements and conflict between the tourism and fishery industries. Demarcations will reduce conflict by designating areas where operations are permitted for tourism and fishery activities. (Consultations with the Navy, Sri Lanka Port Authority)

**Involve the Navy in whale-watching activities along the entire coast.** Besides conducting whale-watching tours in Galle and Trincomalee, the Navy can support whale-watching activities by supporting regulations, conservation efforts, best practice sharing, monitoring and reporting on whale migration patterns, and other activities conducive to sustainable whale-watching. (Consultations with the Navy)

**Form a petrol tax concession for registered boat operators to Pigeon Island to enhance the use of petrol instead of, often cheaper, kerosene.** Having a petrol tax concession will incentivize operators to adhere to regulations around registration and reduce petrol from leaking into the diving area and marine biodiversity adjacent to the shoreline. This will improve water quality in and around Pigeon Island (thanks to reduced kerosene usage) and improve the health of coral reefs and marine life found offshore. (Empirical findings, Consultation with Maritime Archaeology Unit).

#### *Medium-term*

**Raising environmental sustainability standards.** It is recommended to ban single-use plastics on boats and promote eco-friendly alternatives instead, cognizant that materials such as glass should not be used on board to avoid safety risks. Such alternatives could include refillable water jugs with water refilling stations made available at marinas, ports, and other locations where yachts and marine vessels will dock. (Consultations with the Chamber of Marine Industries and Sri Lanka Port Authority)

**Conduct regular environmental impact assessments.** EIAs are an important tool that can be used to monitor how tourism activities affect, or hypothetically would impact marine ecosystems. EIAs, a mandatory first step of the pre-construction phase for tourism and other establishments, and should be undertaken prior to determining project feasibility with additional EIAs conducted periodically to assess if operational changes should be made or if management strategies should be adapted accordingly. (Empirical findings, Tourism Demand and Supply Assessment in Sri Lanka<sup>12</sup>)

#### *Long-term*

**Establish a national wildlife circuit along the eastern, southern, and northern coasts to foster collaboration among tourism providers and stakeholders.** The development of a circuit would help promote conservation efforts on the national level, spread awareness on Sri Lanka's wildlife species and increase protections for Sri Lanka's wildlife species (particularly elephants and leopards), but especially its marine wildlife (whales and dolphins). (Tourism Demand and Supply Assessment in Sri Lanka<sup>13</sup>)

**Integrate secondary (niche) tourism products into packages i.e. sustainable wildlife-watching itineraries.** Niche tourism products and services that are not anchor products should also be promoted as a part of package tours and added to tourism itineraries that are aimed at responsible wildlife watching. (Consultations with USAID, Ministry of the Environment)

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<sup>12</sup> IPE Global & EML Consultants. (2019). *Development Plan for 4 Targeted Market Segments: Tourism Demand and Supply Assessment in Sri Lanka and Preparation of Detailed Investment Proposals for Targeted Destinations and Market Segments*. Australian Aid and World Bank.

<sup>13</sup> IPE Global & EML Consultants. (2019). *Development Plan for 4 Targeted Market Segments: Tourism Demand and Supply Assessment in Sri Lanka and Preparation of Detailed Investment Proposals for Targeted Destinations and Market Segments*. Australian Aid and World Bank.

## Deliverable 4: Key Infrastructure Recommendations

The Deliverable 4 report applied findings on each of the target destinations' infrastructural landscapes, noting the requirements and strategic investments needed to enhance the overall marine tourism offering. Additional insights were taken into account from the Urban Development Authority (UDA), among other, tourism development plans and stakeholder consultations to understand where, when and how infrastructure could be introduced and how planning and management can ensure its maintenance and sustainability. The report highlights key findings based on the gaps and needs that were gathered from previous reports, notably, the Inception Report, Market Analysis, and Zonation and Spatial Plan overview.

For the scope of this report, "infrastructure" is understood as the physical structures, amenities, facilities, equipment, and technical and operational capabilities of the marine tourism industry, including its offerings and services. Hence, "key infrastructural development" covers a wide range of recommendations, from meeting basic tourist needs to improving existing marine tourism activities.

### Infrastructure recommendation

#### *Short-term*

**Carrying capacity studies/ activity limitations for destinations.** Carrying capacity studies are suggested for all target destinations to provide insights on the impacts of tourism on the host destinations and marine tourism sites. Activity limitation studies should also further examine the impact of tourism on marine and coastal areas to determine the maximum number of tourists that the area could sustainably permit per day (per site). (Empirical findings, Tourism Demand and Supply Assessment in Sri Lanka<sup>14</sup>)

**Prioritize health and safety in infrastructure and planning.** Tourism health and safety should be the first priority as any incidents resulting in tourist harm or loss of life directly affect the reputation of the activity and the safety of the destination. Therefore, the quality of equipment and marine vessels is important as are regulations for activities that have the potential to cause injury or other harm to tourists. (Consultations with UDA)

**Introduce basic hard infrastructure in coastal/beach areas to address the current lack of amenities (i.e. bathrooms, changing areas, drinking water, electricity).** Basic public infrastructure is lacking in and around coastal areas, including on tourist beaches, around lagoons and in nature areas. For locations with existing hard infrastructure (rest-rooms, changing areas, potable water, etc... Facilities are in a poor/passable state, but require upgrades to meet international standards. Introducing such infrastructure is necessary before other upgrades can be made to beach areas and prior to additional tourism activities or services being added and promoted to international or luxury-minded tourists. Cognizant that infrastructure should not be directly on public beaches as per CCD regulations, such public infrastructure should instead be on areas adjacent to beaches. (Empirical findings from site visits, Consultations with CCD, Dept of Wildlife)

**Facilitate private sector involvement, investment readiness, and ease of doing business.** For Sri Lanka's tourism industry to prepare for the level of investment needed to transform the industry into one that can welcome luxury tourists, the government needs to enhance investment readiness to make it more lucrative for investors through, for example, tax incentives (for the import of marine vessels), streamlining development processes, and reducing risks associated with tourism development in coastal areas. (Consultations with Chamber of Marine Industries)

**Improve collaboration, Public-Private Partnerships, and communication among tourism stakeholders.** Tourism stakeholders at the high level are siloed without an understanding of other tourism development projects. Hence, there is a general need to facilitate communication amongst government agencies, development banks, and other tourism bodies so that each stakeholder is familiar with the tourism development projects in progress to avoid duplication and redundancy and improve collaboration to increase impact and efficacy. (Empirical findings drawn from consultations with development agencies, USAID and UNDP)

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<sup>14</sup> Ibid.



**Enhance coordination among key stakeholders, such as the Ministry of Tourism, SLTDA, and Tourism Promotion Board, to improve Sri Lanka's marine tourism, infrastructure, and regulations.** Key stakeholders are suggested to work more closely together to support infrastructural advancements and advocate for regulations that conserve marine tourism assets, including coral reefs, whale species, and other vulnerable species. (Empirical findings from site visits, Consultations with the Ministry of the Environment, Accelerating Experimental Tourism 2023<sup>15</sup>)

**Safeguard sensitive marine and terrestrial locations.** This can be facilitated by introducing effective monitoring processes and developing codes of conduct to prevent tourism-related damage. Such codes of conduct should be integrated into tourism communications in signage and verbal communication (by tourism operators). (Empirical findings)

#### *Medium-term*

**Develop sewage treatment plants and waste management systems to address environmental concerns.** Raw sewage and waste are commonly found in waterways where tourism activities take place, causing reduced water quality, environmental degradation, and harm to marine species, who mistake waste for food. Sewage treatment plants and enhanced waste management are also needed to avoid leakage into coastal areas, beaches, and waterways. (National Environmental Act No. 47<sup>16</sup>, Coastal Water Quality Monitoring Program (2009)<sup>17</sup>, Consultations with Sri Lanka Port Authority, SLTDA)

**Strengthen protections for marine protected areas and support them through funds generated from marine-based activities, directly contributing to conservation efforts.** A percentage of sales for marine-based activities should be allocated towards conservation initiatives under the mandate of the Department of Wildlife. Additional funding should be designated for local NGOs, programs, and other relevant entities operating in the respective areas. (This recommendation is based on empirical findings and consultations with tour boat operators in Kalpitiya.)

**Integrate boat-building training and capacity-building programs in each destination to cultivate appreciation for Sri Lanka's maritime history within the marine tourism industry.** Such programs should also support job skills development and provide a sustainable and trained workforce to perform construction and maintenance on marine vessels. (Consultations with Sail Lanka and Chamber of Marine Industries)

**Provide additional support to historical, cultural, and archaeological heritage sites significant to the marine tourism industry in all three target areas to enhance conservation and restoration efforts.** Funding should be allocated to the conservation and restoration of marine and historical artifacts in the target areas (and communications materials around these sites). An additional emphasis should be placed on attracting investment to turn sites like lighthouses into alternative luxury accommodations. (Consultation with shipwreck tourism stakeholders).

#### *Long-term*

**Expansion of jetties, marinas, ports, and cruise ship capacity.** There is a general need to increase Kalpitiya, Galle, Trincomalee, Jaffna, Mannar's and the North-eastern coastal belt's capacity to welcome additional marine vessels and offer amenities that meet international standards. Specifics on this have been included in the respective destination-specific tables, which highlights suggested development for passenger terminals and docking areas. (Empirical findings)

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<sup>15</sup> Accelerating Experimental Tourism: Recommendations by the Tourism Committee. (2023). Sri Lanka Tourism Committee.

<sup>16</sup> Act No. 47 of 1980. (1980). Central Environmental Authority. <https://www.cea.lk/web/images/pdf/acts/act47-80.pdf>

<sup>17</sup> Coastal Water Quality Monitoring Program Analysis Report: Arugambay, Nilaveli, Polhena, Unawatuna Hikkaduwa, Mount Lavinia. (2019). Coast Conservation and Coastal Resource Management Department. [https://www.coastal.gov.lk/images/pdf/publication/Coastal\\_Water\\_Quality\\_Report\\_-\\_2019.pdf](https://www.coastal.gov.lk/images/pdf/publication/Coastal_Water_Quality_Report_-_2019.pdf)

**Implementation of environmentally-minded transport options (eco-friendly boats, public transportation, e-tuk-tuks, etc..).** This transformation will reduce Sri Lanka's reliance on fuel and help the country build an eco-friendly image. It will also help minimize kerosene pollution in waterways, improving water quality in areas frequented by boats. Such eco-friendly transport vehicles could be introduced via loan programs, buyback schemes, or other initiatives that improve affordability for tourism operators and fishermen particularly. (Consultations with the Department of Coast Guard, Cinnamon in Hikkaduwa, Accelerating Experimental Tourism 2023<sup>18</sup>)

**Renewable energy production.** Sri Lanka has the potential to harness solar energy to power tourism establishments and boats, bringing down operating costs, improving self-reliance and resilience in the tourism industry and enhancing the response to natural disasters or other economic and climate challenges. (Empirical findings, Consultations with Sail Lanka)

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<sup>18</sup> Accelerating Experimental Tourism: Recommendations by the Tourism Committee. (2023). Sri Lanka Tourism Committee.

## Deliverable 5: Marine Tourism Anchor Products

### Diving/ Shipwreck Diving

Sri Lanka's diving industry is able to make use of the country's vast offering of dive sites (both natural and man-made). The country's reefs, the multitude of marine species, and the vast number of shipwrecks located off the coast of Sri Lanka provide the potential for dive tourism to add new revenue streams if assets remain protected and intact.

Shipwreck diving attracts a niche market of tourists, including lifestyle divers, who often book longer stays to allow for multiple dives, days between dives, and extra days before and after flights to keep to safety guidelines. These types of tourists (who are high value and sustainability-minded) have the power to significantly increase the economic gains of coastal destinations while keeping to conservation principles due to their affinity for marine biodiversity.

Dive Sri Lanka offers excursions to approximately 60 sites, including dives to hundred year old wrecks. Most dive sites are located in and around Colombo (18 locations), then Galle (11 locations) and Trincomalee (6 locations). Lifestyle divers are particularly fond of dive school-led experiences, either as standalone activities or packages booked prior to visitors' arrival or in the days leading up to the excursion. While multi-day options would likely be booked prior to arrival at the destination, half day or full day dives could be booked by divers within a day's notice.

Expertise level, personal interests and additional interest in the destinations' secondary tourism activities will inform: preference for certain dive sites, the depth of the wreck dive. Factors including frequency of dives, time spent at the destinations and preferences for dive location also impact tourists' preferences. The chart below displays some of the beaches that have been recommended for diving and snorkeling activities.

Resort	Beach	Diving and snorkeling	Attractions	Surfing
Colombo	Yes		Yes	
Negombo	Yes		Yes	
Hikkaduwa	Yes	Yes		Yes
Bentota	Yes			
Beruwala	Yes			
Unawatuna	Yes	Yes		
Galle		Yes	Yes	
Weligama	Yes			Yes
Mirissa	Yes			Yes
Dikwella	Yes			
Tangalle	Yes			
Koggala	Yes			
Trincomalee	Yes	Yes		Yes
Kandy			Yes	
Jaffna	Yes	Yes		
Mannar	Yes			
North eastern coastal belt (Kuchchaveli-Mullaitivu)	Yes			
Ambalangoda	Yes			

Source<sup>19</sup>

<sup>19</sup> Mitrofanov Sergey. <https://nashaplaneta.net/>

For diving to reach its potential as an anchor product, Sri Lanka will need to:

- Conserve marine species and coral reefs, and revive Bar Reef and other degraded marine areas. (Consultation with the Ministry of the Environment, Dept. of Wildlife Conservation)
- Promote that the country's shipwreck diving caters to tourists with varying skill levels since shipwrecks are located at depths ranging from 13m to 60m. (Consultation with Shipwreck diving stakeholders, Dive centre in Trincomalee)
- Use the national shipwreck database to promote that shipwreck diving can be done all around the country, encouraging longer stays for tourists and offering multi-location tours. (Consultation with Shipwreck diving stakeholders)
- Offer a range of diving certifications including niche certifications for wreck dives, and provide dive master courses for long-stay tourists. (Empirical findings, Consultation with Shipwreck diving stakeholders and Maritime Archaeology Unit)
- Provide licensing or insurance specific to diving activities, for example, licensing dive centres (basic liability insurance does not cover incidents) (Consultation with Maritime Archaeology Unit)
- Broaden the current customer base of lifestyle divers by making diving more accessible to tourists who visit Sri Lanka for purposes other than diving. (Consultation with Shipwreck diving stakeholders)
- Organize diving competitions and events where divers from all levels can enjoy. (Empirical findings, follow-up meeting with Marine Tourism Steering Committee)
- Connect diving with other onshore and inland activities to promote the entire area. (Empirical findings)
- Lifting the ban on diving in Mannar. (Meeting with private sector stakeholders in Mannar)
- Streamline the process for obtaining permissions to dive in environmentally sensitive areas and in proximity to military monitored areas. (Meeting with private sector stakeholders in Mannar)

## Kitesurfing

Kitesurfing should be considered Kalpitiya's main tourism anchor product thanks to the area's favourable wind conditions, vast lagoon area, and reputation for kitesurfing activities. Kalpitiya attracts kitesurfing enthusiasts from around the world from all different levels. While many advanced kitesurfers travel with their own equipment, many beginner or intermediate kitesurfers require rentals and multiple days of instruction from kite surfing instructors. Instruction packages and equipment rentals would likely be booked directly with tourism service providers

The following suggestions should be considered to grow Kalpitiya's destination as a regional kitesurfing hub:

- Tax waiver for Sri Lanka kitesurfing and diving equipment to support the industry and its scalability (Consultation with Kalpitiya tourism service providers operators and Unawatuna dive operators)
- Organize kitesurfing competitions and internationally-oriented events. (Consultation with Kalpitiya kitesurfing operators/ tourism service providers)
- Promote the sports online by inviting streaming tournaments/events, influencers, and bloggers. (Consultation with Kalpitiya kitesurfing operators, tourism service providers, and Tourism Promotion Board)
- Promote local kitesurfing instructors rather than foreign instructors by providing them with certification and language courses. (Empirical findings, Consultation with Kalpitiya kitesurfing operators)
- Market Mannar as a kitesurfing destination. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)

## Surfing

Sri Lanka's south coast hosts prime conditions for surfing, attracting surfers of all levels to its many coastal destinations including the Greater Galle Area. The second most popular water-based activity in Sri Lanka is surfing, with the potential to attract over half a million tourists by 2027 according to figures from SLTDA. Surfing is the most common with European visitors as well as visitors from Canada and New Zealand and Thailand.

While many surfers, especially lifestyle surfers, bring their own surfboard and other equipment, beginners and other surfers traveling from Europe or other international destinations often opt to rent boards from rental service providers that are both formal and informal. Casual beginner/intermediate surfers frequently choose to book group lessons or private instruction to improve their level or obtain a basic skill level.

Building off of the area's established reputation for surfing, infrastructural considerations aim to maintain the quality of surfing conditions and increase the visibility of the Greater Galle area's surf tourism destinations.

- Protect surf beaches (Empirical findings, Consultations with Cinnamon Hotels & Activity Service Providers in Hikkaduwa, and Galle surf instructors and service providers)
- Reconsider development that will alter favourable wave patterns (Empirical findings, Consultations with Cinnamon Hotels & Activity Service Providers in Hikkaduwa, and Galle surf instructors and service providers)
- Incentivize the formalization of surf instruction (Consultation with SLTDA, Empirical findings from discussions with "Beach Boys" in Bentota)
- Host international surf competitions (Empirical findings, replicating competitions taking place in Arugam Bay)

### Boating/Sailing/Yachting

Due to its geographical location between the Middle East and Southeast Asia, Sri Lanka is positioned as a prime stop for sea vessels. During their stay, tourists use various types of transport to traverse the island with a small minority using boats and catamarans to travel to and from coastal destinations by sea. According to the SLTDA, around 5% of all tourists currently use boats as transport or for leisure cruising. It is estimated that 68 thousand tourists will use boats or catamaran services in 2023, though this figure is expected to more than double by 2027. Based on the survey of departing foreign tourists, conducted during 2018-2019 by the Sri Lanka Tourism Development Authority (SLTDA)<sup>20</sup>, it was determined that boat renting services are overwhelmingly used by luxury travelers, especially those who are chief executives, directors, or company owners (8.08%), as well as professionals (46.9%); a segment that makes up the majority of Sri Lanka visitors.

The Sea Leisure Yachting Group (SLYG) has paved the way for yacht and marine leisure tourism's increasing popularity, having taken a leading role in manufacturing, chartering, mooring, and other yacht-related activities. Sail Lanka, the only sailing company that operates across the entire island, has a fleet of 10 yachts that offer day trips (for sightseeing and marine recreational activities including snorkeling, paddle boarding, jet skiing) and multi-day tours spanning 1 to 6 days. Additional optional excursions to cultural sites or wildlife parks are also included in packages as are onshore activities.

Considering the growing demand for these types of excursions and other custom tours, the addition of marine tourism infrastructure is suggested to improve destinations' capacity to offer half or full day cruises, single or multi-destination package tours, private single or multi-day charters, or as private event venues.

To continue to welcome new marine vessels and expand capacity, development will need to:

- Increase accessibility of information on existing and planned marinas through social media, magazines, and online news articles. (Empirical findings)
- Identify the suitable fishery harbours based on their capability to provide infrastructure facilities (local designations) for the boating/sailing yachting activities and preparations of regulations accordingly. (Input from the Fisheries Harbour Corporation)
- Highlight Sri Lanka's appeal as an ideal location for yachts from Europe, Australia, and Southeast Asia to refuel, rest, and explore for more than a week. (Consultations with Port Authority and Sail Lanka)
- Foster a boating lifestyle and local participation in Sri Lanka. (Consultations with Marine Tourism Steering Committee)
- Create a cruising area and network of destinations with countries like Maldives, India, Seychelles,

<sup>20</sup> Survey of Departing Foreign Tourists from Sri Lanka 2018-2019. (n.d.). Sri Lanka Tourism Development Authority. <https://www.srilanka.travel/documents/Airport%20Survey%202018-2019.pdf>



and Madagascar, making Sri Lanka a preferred stop for travelers. (Consultations with Marine Tourism Steering Committee)

- Engage influencers and bloggers in yacht travel or yacht rentals to showcase marine and onshore tourism activities. (Consultations with Kitesurfing Sri Lanka & Vayu Resort)
- Showcase Sri Lanka's capacity to produce high-quality boats, attracting yacht enthusiasts and building the country's reputation in the yachting community. (Consultation with Sail Lanka)
- Make yachts and boat rentals more accessible from accommodation and provide event organizing services. (Empirical findings supported by market research in Deliverable 2)
- Expand operations to destinations in the Northern Province (once infrastructure has been introduced to support expansion) (Meeting with Sail Lanka)
- Add service to the offshore islands (Delft island, Eluvaitivu, Analaitivu, Nainativu) (Meeting on Delft Island and site visits to Eluvaitivu, Analaitivu, Nainativu)

## Wildlife watching

Sri Lanka's marine wildlife, notably its whale and dolphin populations, present the opportunity for tourists to view rare species in their natural habitat. However, in order for this type of activity to be sustainable, specific considerations need to be made to prevent harm or incidents resulting from mismanagement.

Around 140,000 tourists take part in wildlife watching excursions with projections estimating that this will increase to approximately 300,000 by 2027 if baseline scenario predictions stay on course according to primary research using data provided by SLTDA. In an optimistic scenario, this figure could grow to as high as 337,000 tourists booking wildlife watching experiences. While wildlife sightseeing experiences, such as whale watching, would likely be booked either the day prior to the experience or on the same day, directly with the tourism service provider, private excursions are often led by high-end accommodations. According to surveyed tour operators (primary research using SLTDA statistics, Deliverable 2), 81.3% of wildlife sightseeing experiences are booked as part of packages. Apart from pre-booked experiences, such options are often chosen by guests upon arrival to their accommodation or booked directly via reception.

Taking the likelihood of an increase in sightseeing experiences being offered, and cognizant of the unsustainable impact that the current offering is having on wildlife behavioural patterns, it is imperative that the sector is immediately regulated to prevent further harm.

To ensure the sustainability of wildlife excursions, it is necessary to:

- List Sri Lanka's marine wildlife, especially its whale species, as a national asset to improve protections around species and raise awareness on the need to interact with them sustainably (Empirical findings, Consultations with ADB)
- Establish a code of conduct for marine tourism operators to follow, aiming to prevent actions such as chasing, touching, or engaging with whales in manners that could modify their behaviour, induce stress, or disrupt migratory patterns. (Based on empirical findings and consultations with ADB)
- Highlight the ease of wildlife encounters in the country in tourism promotional strategies while simultaneously promoting responsible wildlife-watching practices to position the country as a sustainable tourism destination. (Empirical findings, Consultations with ADB)
- Showcase the country's diverse marine and inland species and the abundance of vegetation in the mangrove and jungle areas, reinforcing the importance of eco-tourism in the country's sustainable branding. (Empirical findings, Consultations with ADB)
- Emphasize the presence of over 20 national parks and the opportunities they offer for eco-tourism experiences. (Empirical findings, Consultations with ADB)
- Foster collaborations with biologists and scientists to facilitate voluntourism opportunities, citizen science projects, and school trips, allowing tourists to participate in conservation initiatives. Set up a scientific committee to vet initiatives. (Empirical findings, Consultations with Ministry of the Environment, UNDP, WNPS, Sea turtle informal service provider - Galbokka Sea Turtle)
- Protections for bird migration routes in Jaffna, Mannar and the north eastern coastal belt. (Deliverable 3, Scope 2, Empirical findings)
- Development of eco-tourism bird watching tours in Jaffna as a tourism product that does not threaten the integrity of the area's natural lagoon habitat. (Deliverable 3, Scope 2)

## Cruise tourism

Cruise tourism has rebounded more quickly than international tourism arrivals and continues to be one of the fastest-growing tourism segments. (State of the Cruise Industry 2023<sup>21</sup>). Cruise revenue is set to reach 57 billion U.S. dollars by 2027 from 37.8 billion in 2017 according to estimates<sup>22</sup>, demonstrating that the interest in cruise tourism is only going to continue to rise.

There were 5.24 thousand cruise tourists in 2022 and it is anticipated that there will be 9.8 thousand tourists by 2027. Sri Lanka welcomed approximately 54 cruise ships in 2023, primarily during the November-May period with 65% arriving at Colombo port. The opening of the cruise terminal in Trincomalee now welcomes passenger ships from Chennai on a weekly basis, and will continue to bring a steady stream of tourists to Trincomalee.

KKS (Kankesanthurai) in Jaffna welcomes 150 person passenger ferries from India on Mondays, Wednesdays, and Fridays, arriving at 11:30 and departing at 13:00, taking a total of 3.5 hours. Restoration efforts, which were completed recently, are expected to be continued through an expansion project funded by an Indian Bank. The project will add a 6-meter draft, and a new jetty - 8-meter draft, totalling \$60 million. Although the project is on hold due to challenges obtaining the necessary funds, it is anticipated to take 1.5 years once begun. Without the expansion development, cruise ships cannot directly dock at KKS.

Additional tourism products and services in addition to basic infrastructure facilities are required to meet cruise tourist demands.

- Need to add immigration processing centre, basic infrastructure facilities, amenities and shopping areas
- Can create additional daytime activities for tourists interested in half day excursions before departure
- Further expansion of the cruise terminal will require a carrying capacity and activity limitation study
- Sri Lanka can be promoted as a cruise destination, by being included on tour itineraries as a cruise single (Colombo) or multi destination stop (Colombo/Trincomalee or other coastal destinations).
- Extensions at KKS to enable cruise ships to dock. (Meeting at KKS)

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<sup>21</sup> State of the Cruise Industry. (2023). Cruise Lines International Association. <https://cruising.org/en/news-and-research/research/2023/march/2023-state-of-the-cruise-industry-report>

<sup>22</sup> Statista. (2024, May 22). Revenue of the cruise industry worldwide 2007-2027. <https://www.statista.com/statistics/204572/revenue-of-the-cruise-line-industry-worldwide-since-2008/>

## Seasonality of Tourism Products and Services

Sri Lanka is aspiring to become a year-round destination, although in order to do so requires mitigating factors such as seasonality. Sri Lanka's seasonality mainly revolves around its alternating monsoon season. Traditionally the high season in the south takes place during the winter and in the east in the summer months with shoulder seasons falling in between. Unlike other competing countries in nearby Southeast Asia where monsoons disrupt travel and impact the desirability of beaches (i.e. plastic pollution in Bali's off season), Sri Lanka's monsoon season is relatively mild.

This presents the opportunity to market the destination and its coastal destinations not only during the traditional high session, but also in summer months when European tourists (one of Sri Lanka's key markets) are likely to take extended vacations. Having a year-round tourism season additionally supports tourism dispersal at the destination-level and within Sri Lanka as a whole. Instead of tourists being centralized in one area, a year-round season will encourage tourists to visit "off peak" destinations including those off the main circuit. As a result, tourism development is able to play a key role in reducing seasonality by supporting the creation of year-round tourism activities. Diversifying the overall offering in each target destination will yield benefits for local communities, tour operators and accommodation providers and increase their competitiveness in the long-term.

The following chart demonstrates the monthly projections of tourism figures over the period of 2023-2027 using the averages from the benchmark 2016-2018 seasons using SLTDA data; a time period with a low seasonality ratio and a steady tourist inflow.

The chart below features an estimated monthly distribution of tourist inflows to Sri Lanka over the course of 2023-2027 in three different scenarios: baseline, optimistic and pessimistic. Regardless of the scenario, arrivals are expected to grow and in some cases double (seen in the baseline and pessimistic scenarios) in the traditional off-season months of June, July and August, when the south coast is closed. For example, based on this estimate in the following baseline scenario, tourism arrivals are expected to double in the month of June, going from 92,000 arrivals in 2023 to 182,000 in 2027.

A similar trend is also found in a pessimistic scenario with arrivals increasing from 62,000 in 2023 to 140,000 in 2027 and on a smaller scale in the most optimistic projections where arrivals grow from 140,000 to 205,000 over the same period of time. This growth pattern signifies that growth is expected to continue to rise in the "offseason" in all scenarios.

As summer arrivals traditionally concentrate around the eastern region's coastal destinations of Arugam Bay and other inland destinations such as Ella, developing and expanding the capacity of Trincomalee and other Northern Province destinations of Jaffna, Mannar and the north eastern coastal belt, could help diversify and spread tourism. Without efforts made to mitigate seasonality, the eastern region will likely see increased pressures on resources and a rising demand for accommodations, especially during peak travel times such as festival seasons.

This prospective increase in summer arrivals presents additional opportunities for destinations that offer year round tourism products and services. Kalpitiya, with its prime year-round conditions for kitesurfing could, for instance, benefit, leveraging increased arrivals to mitigate its seasonality in the long-term.

	Base Scenario* (Thousands)											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
2023	103	108	125	114	90	92	151	138	106	109	127	173
2024	198	198	193	149	118	122	199	182	139	144	166	227
2025	214	214	208	162	128	132	215	196	151	155	180	246
2026	257	257	250	194	154	158	259	236	181	186	216	295
2027	296	296	288	224	177	182	298	272	209	215	249	340
	Optimistic Scenario* (Thousands)											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
2023	103	108	125	172	136	140	229	209	160	165	191	261
2024	242	242	236	183	145	149	244	223	171	176	204	278
2025	261	261	254	197	156	161	263	240	184	190	220	300
2026	299	299	291	226	179	184	301	275	211	217	251	343
2027	334	334	325	252	200	205	336	307	235	242	281	383
	Pessimistic Scenario* (Thousands)											
	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
2023	103	108	125	76	60	62	102	93	71	73	85	116
2024	148	148	144	112	89	91	149	136	105	108	125	170
2025	163	163	159	123	98	100	164	150	115	118	137	187
2026	197	197	191	148	118	121	198	180	139	143	165	226
2027	227	227	221	172	136	140	229	209	160	165	191	261

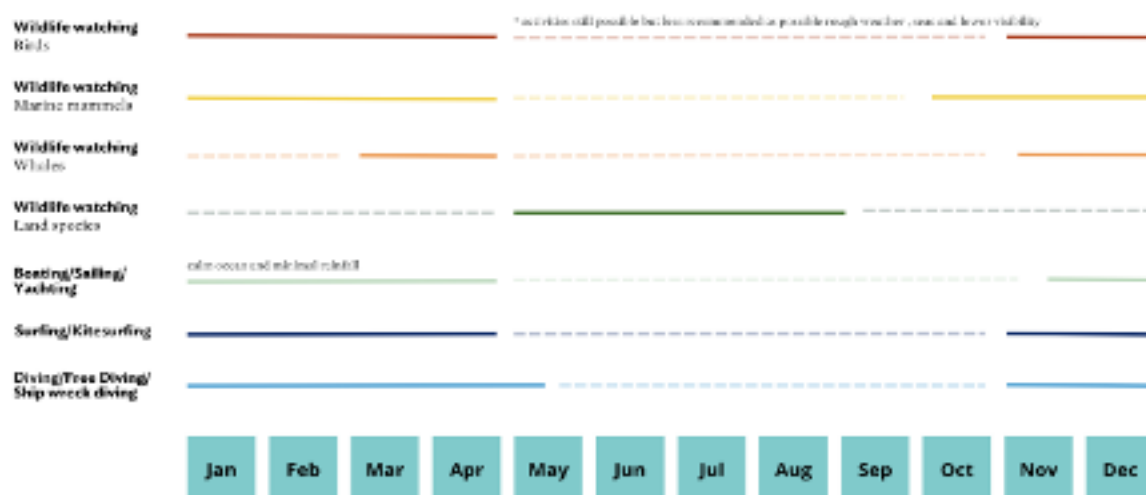
\* Data for the first 3 months of 2023 are from arrival data rather than projections.

Source: Sri Lanka Tourism Development Authority (SLTDA), the Pacific Asia Travel Association (PATA), Savvy

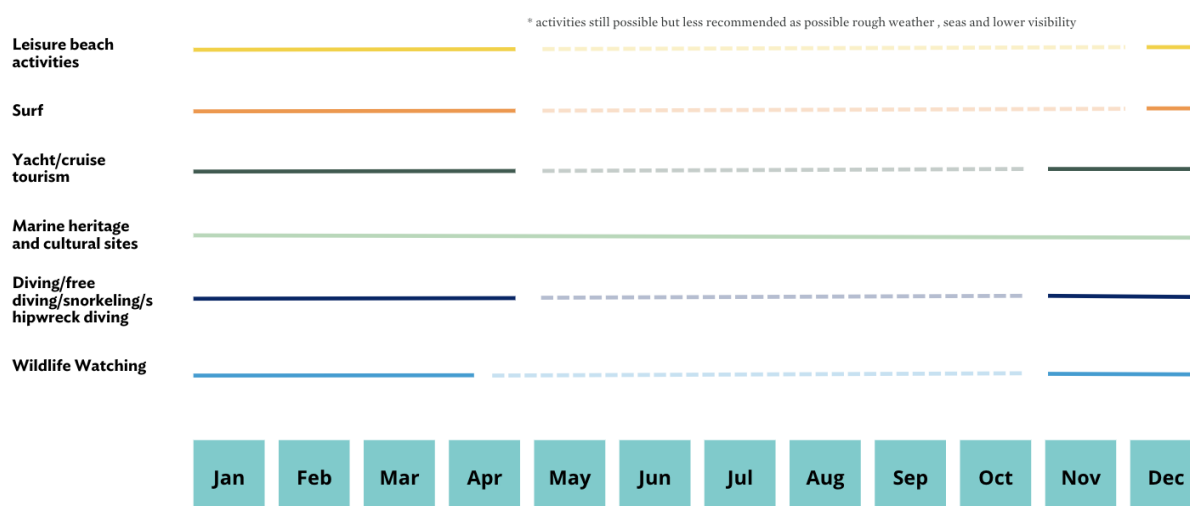
The following charts underline the seasonality of each of the three destinations' tourism products and services followed by recommendations for “offseason” activities that could be used to mitigate seasonality. For example, “off-season” activities in Kalpitiya could be created around land-based wildlife tourism, which peaks in May/early September. As year-round kitesurfing conditions sustain Kalpitiya's tourism, seasonality can be mitigated by supporting activities for kite surfers to participate in simultaneously side-by-side with sports activities. This differs from the Greater Galle Area, where the season is winter-centric with little for tourists to do in the summer months. In this case, cultural and maritime heritage tourism activities can be promoted to build Galle's reputation as a marine tourism hub. For Trincomalee, diving particularly presents the opportunity for year-round tourism, with surfing able to attract tourists in the “off-season” summer months. Therefore each destination demonstrates its potential to adapt in a way that can attract tourists year-round.

The Northern Province, which experiences an alternating monsoon season, has optimal weather conditions between April and September/October, with the rainy season running during the “high season” months of November through January. However, the rainy season presents less than ideal conditions for marine tourism activities in the Northern Province, including Jaffna. The tourism season in Mannar is from November through April, with the busiest time following the month of January, when domestic tourism is at its height. Monsoon season, which runs from October to January, follows the pattern of the Maha monsoon, affecting the northern and eastern part of Sri Lanka. During this period, turbulent sea conditions reduce visibility for diving and snorkeling with calmer waters ushering in good conditions in November and December. During this same period, bird migration reaches its peak, running from November to April, bringing in many avid birdwatchers. The north eastern coastal belt, with a similar climate to neighbouring Trincomalee, has the potential to become a year-round tourism destination. The belt's high season runs from May to October, with its busiest time falling within the summer months of June-August. Therefore, while each destination has its own unique tourism seasons, they also appear to be able to offer year-round activities that attract tourists regardless of the season.

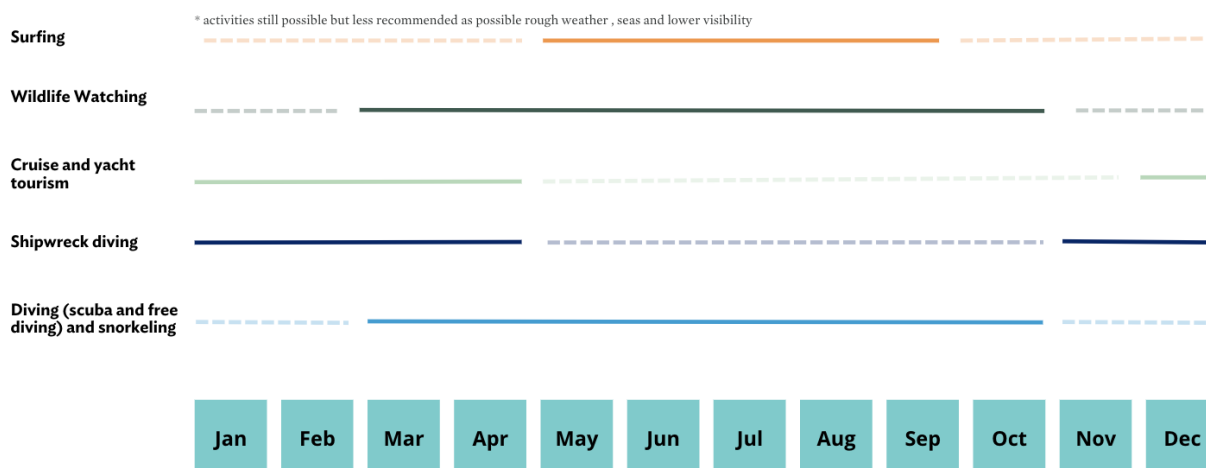
## Seasonality of Kalpitiya's tourism products



## Seasonality of Galle's tourism products

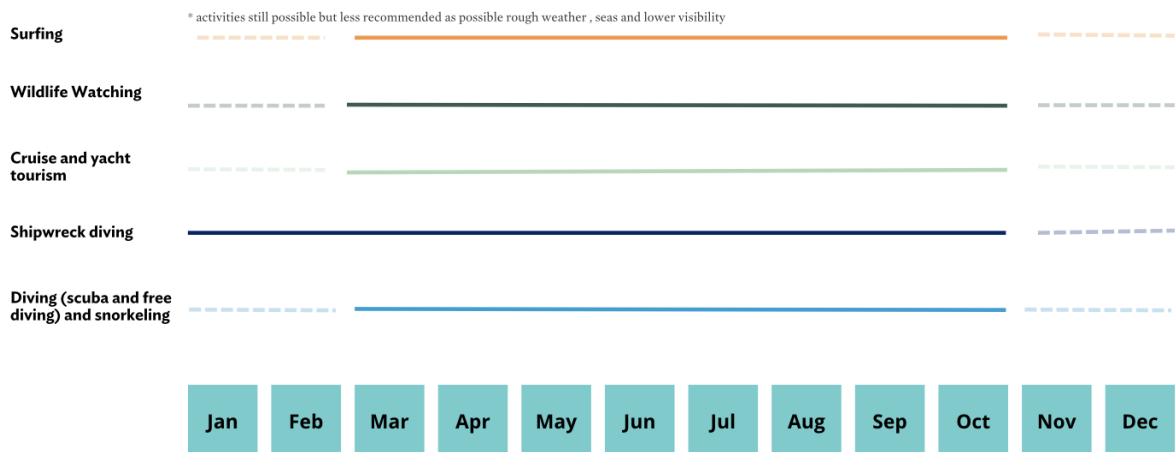


## Seasonality of Trincomalee's tourism products

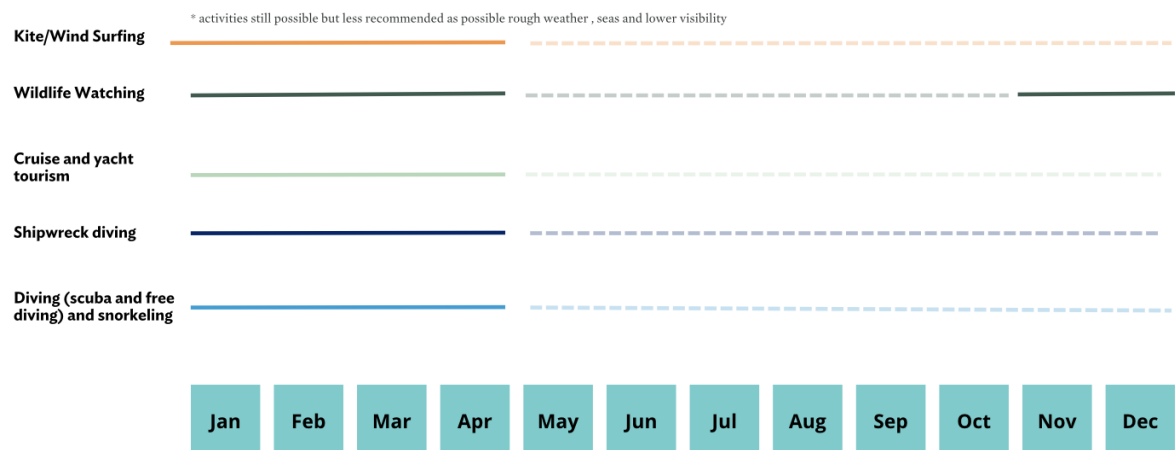




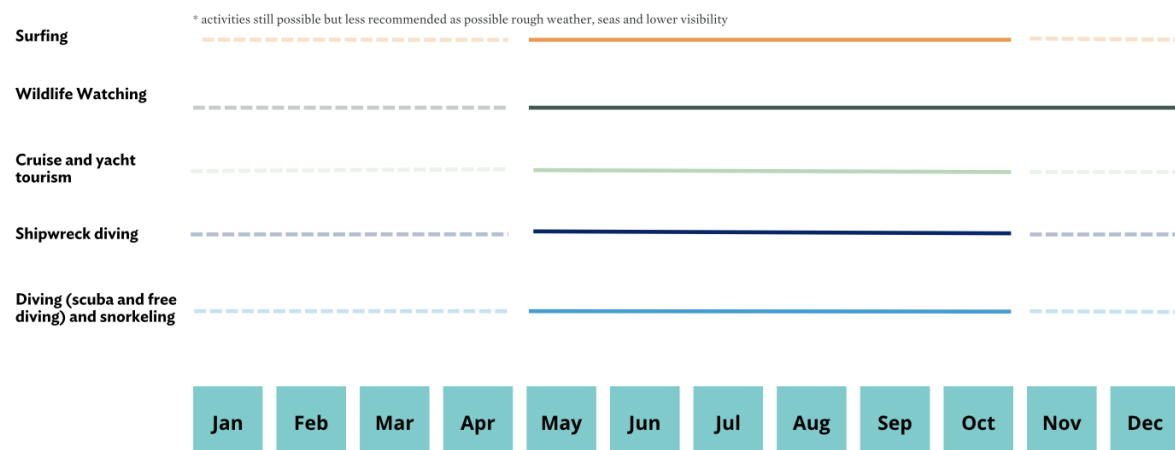
## Seasonality of Jaffna's tourism products



## Seasonality of Mannar's tourism products



## Seasonality of NE Coastal belt's tourism products



## Tourism Development Strategies

The following strategies have been developed based on Sri Lanka's short-, medium-, and long-term ambitions for the marine tourism industry. Insights from market research, previous development plans, stakeholder consultations and empirical findings were used to determine where strategies could enhance growth, revenue, arrivals, spending, and other indicators of a successful industry.

### Short-term

- **Experimental tourism product development** to create authentic experiences for guests that incorporate Sri Lanka's natural beauty, marine assets and coastal landscapes, while spreading the benefits of tourism to local communities, including community members and areas of the country (including the Northern Province) that have previously been excluded from tourism development. Examples of experimental tourism include niche and other one-of-a-kind activities like shipwreck diving, re-purposing lighthouses as alternative accommodations and other types of activities encompassing Sri Lanka's maritime heritage. This should be echoed in the destination's ambition for governance, connectivity, training and capacity building, destination-marketing, and product development under the themes of: nature, adventure, culture, history and flavour. These themes have been used in the development of activities for the target destinations in this project scope. (Accelerating Experimental Tourism 2023)<sup>23</sup>
- **Development of a phased approach to tourism development** applying the findings from this report based on readiness level, accessibility, political contexts, and competitiveness factors. This should include "mascoting" the unique value of each destination to operationalize the development roadmap of each area.
- **Regulations and enhanced enforcement of unsustainable tourism activities** (for whale watching specifically) to reduce boat traffic, unregulated tourism activities, and illegal whale diving. (Empirical findings, Consultations with ADB)
- **Development of an independent unit responsible for tourism sector data collection and analysis** (surveying, tourist satisfaction, determining arrival numbers, tourism preferences, trend analyses, forecasting...etc.) to inform a data-driven approach to tourism decision making echoing the sentiments of the Accelerating Experimental Tourism 2023<sup>24</sup> report.
- **Leveraging the role of the Navy in tourism** (operational and logistical expertise) to support the private sector, especially marine tourism operators. This should include the development of revenue sharing models to compensate the Navy for their support. (Meeting with Marine Tourism Steering Committee)
- **Digitalization of permissions procedures** for building/construction/infrastructure placement, business registration (with SLTDA), initial licensing, renewals, and arrivals of boats/yachts to Sri Lanka to counter corruption and facilitate a transparent and fair process. This is recommended to be supported by various Public Private Partnerships to ensure that the online/digitized processes are aligned with regulations and other requirements while simultaneously supporting the development of a user-friendly and technologically current platform. (Meeting with Marine Tourism Steering Committee, Accelerating Experimental Tourism 2023)<sup>25</sup>
- **Floating and anchored facilities adjacent to beach areas** determining their feasibility, environmental impact, and considerations for permitted activities and purpose. These non-permanent structures are recommended to be used as a physical platform, providing space for rest-rooms, snorkeling gear rental, drinking water provision, lockers, docking areas and other basic infrastructure. Installing these structures should limit or eliminate the environmental impact of increased tourism, preferable for island destinations with vulnerable marine biodiversity (i.e. Pigeon Island), Kalpitiya Bar Reef...etc. and in locations where construction on land is not feasible or at risk of flooding or other climate impacts. As these structures are non-permanent, they can additionally be re-purposed and used in alternating destinations in line with seasonal tourist demand. (Meeting with Marine Tourism Steering Committee)
- **Promote shipwreck diving and create strategic multi-day, multi-location itineraries** to attract divers to Sri Lanka who are interested in taking part in multi-day, multi-level, and historically themed diving excursions (Consultations with DMS & Navy)
- **Facilitate certification (for yachts and marine vessels)** by the Director General of Marine Shipping

<sup>23</sup> Accelerating Experimental Tourism: Recommendations by the Tourism Committee. (2023). Sri Lanka Tourism Committee.

<sup>24</sup> Accelerating Experimental Tourism: Recommendations by the Tourism Committee. (2023). Sri Lanka Tourism Committee.

<sup>25</sup> Accelerating Experimental Tourism: Recommendations by the Tourism Committee. (2023). Sri Lanka Tourism Committee.

approving “International Marine Certification Institute (IMCI)” to become a recognized CE Conformity Certificate certifying body in Sri Lanka ensuring compliance with ISO standards and internationally-recognized “CE certification” standards. This will support the expansion of yachting tourism in the country and enhance the international reputation of Sri Lankan-made yachts. (Input from Sail Lanka)

- **Enable event organization on yachts**, such as birthday celebrations, facilitated upon request and able to be organized directly with accommodations. (Empirical findings based on market research from Deliverable 2)
- **Provide more high-quality, luxury-focused hospitality and vocational training** to foster a workforce that can meet the demands of luxury clientele in the languages of key source markets including English, Chinese, Hindi, Russian, German and French. (Consultations with UNDP hoteliers in Kalpitiya, Accelerating Experimental Tourism 2023)<sup>26</sup>
- **Duty-free inclusion of Sri Lankan-made yachts, boats, and kitesurfing equipment** to support local industry of suppliers and operators by making the purchase of equipment more affordable and, therefore, making activities more affordable and scalable for tourism operators. Multiple scenarios could be applied including the lifting of a 45% pre-revenue tax for B2B owners and a waiver for B2C private owners for the period of at least 5 years. It is further suggested that 50% of Sri Lankan-made equipment (for marine tourism) be exempt from VAT import tax to benefit local producers by making Sri Lankan-made equipment more affordable to tourism operators. Locally manufactured items in the water sports sector should also be given duty-free access as should specific water sports equipment that is not produced in Sri Lanka to stimulate the sector. In doing so, the overall goal should be to ensure that private sector marine tourism operators and businesses are able to source the equipment needed to meet current demand, with incentives used to encourage them to source local products where possible (i.e. boats, kitesurfing equipment...etc.). This will lead to larger profits for the local economy and stimulate underdeveloped or untapped markets such as the B2C buyers market for Sri Lankan-made yachts. Taking these actions will help tourism operators, like Sail Lanka, to invest, expand their fleet and scale to other areas of the country; growing Sri Lanka’s reputation as a boating and yachting destination. (Consultations with Chamber of Marine Industries, Sail Lanka, Kalpitiya tourism service providers operators, and Unawatuna dive operators)
- **Promote cross-cultural understanding** between domestic tourists and locals to increase awareness around the value of travel to instill a deeper understanding around the tourism sector. (Meeting with Marine Tourism Steering Committee)
- **Provide training and build capacity** in local communities and the tourism industry (private sector) through Navy-led efforts particularly in the Northern Province since the Navy has the transport, vessels and ability to guide tourism practices. Additional input can support the monitoring and evaluation needs of the marine tourism industry and scientific studies on the impact of tourism on vulnerable marine environments and ecosystems. (Conversation with the Navy and Marine Tourism Steering Committee)

#### *Medium-term*

- Enhance the quality of whale and dolphin sightseeing activities, surfing, sailing, kayaking, sport fishing, and other water sports. By having proper whale/dolphin watching boats, safety equipment, basic facilities, and hard infrastructure i.e., waste bins in areas frequented by tourists. (Empirical findings, Consultations with CCD, SLTDA)
- Develop a culture for boating and yachting (amongst Sri Lankans as domestic tourists) to generate a natural affinity and organic interest in marine leisure activities to support the reputation of the target destinations’ appeal to international boating and yachting enthusiasts. (Empirical findings)
- Promotion of domestic tourism (for marine activities). It is recommended to include social media visibility to stimulate local participation in marine tourism activities as a catalyst for promoting foreign tourism and enabling a receptive environment for wider community-based tourism development. (Meeting with Marine Tourism Steering Committee)
- Identify new infrastructure facilities for marine tourism. Develop and upgrade the existing infrastructure facilities. (Fisheries Harbour Corporation)
- Ensure compliance with yacht/boat certification by verifying that certification has been obtained

<sup>26</sup> *Ibid.*

by an approved designated body such as IMCI (or other qualified CE certification bodies) and mandate compliance as a condition for waterborne craft to be registered under the Sri Lanka flag or to operate in Sri Lankan waters. (Input from Sail Lanka)

- Platform for booking activities and visitations in line with activity limitations. The platform should use a calendar and time slot booking system with alternative time slots promoted to guests if the booking limit is reached. Hotels and other tourist establishments should additionally be incentivized to encourage weekday bookings to distribute visits to sites over the course of the week. (Meeting with Marine Tourism Steering Committee)

#### *Long-term*

- Water bungalow development to offer unique luxury-oriented overwater accommodations to enhance tourism competitiveness with surrounding destinations to attract high-spend, luxury tourists. (Consultations with Conservation officer, Navy, SLTDA)
- Feasibility study on fishery and commercial harbours for marine tourism and supporting development to obtain an understanding on capacity and development potential. There are currently approximately 47 areas that could accommodate fishery and tourism activities with others available for mooring in the low season. More studies are needed to develop the areas around them strategically i.e. resorts, hotels and other amenities. (Meeting with Sail Lanka)
- Coastal resort development projects should be supported to diversify Sri Lanka's tourism offering with additional luxury accommodations that blend natural landscapes with the area's cultural heritage and history. (Empirical findings, Consultation with SLTDA)
- Turn islands located off of the coast in the north into national parks (for tourism and protection purposes) through collaboration between the Dept of Wildlife and the Navy, to ensure security protocol and observation capacity is met in these areas. (Meeting with Marine Tourism Steering Committee)

Additional specifications for how these strategies overlap with the destination-specific contexts can be found in the following sections.

## Deliverable 3: Spatial and Zonation Plans

The following recommendations for Kalpitiya underline the area's need for additional conservation measures, particularly for Bar Reef, and the enforcement of regulations and mechanisms to address knowledge gaps through data collection and capacity building.

### Zoning Recommendations

#### *Short-term*

Protection of the Bar Reef Marine Protected Area to preserve the competitiveness of snorkeling and diving activities. The state of Bar Reef has greatly deteriorated in terms of healthy coral cover and quantity of reef fish<sup>27</sup>. A complete restoration/coral planting strategy is needed to revive and replant healthy corals to make the reef lucrative to visit again. A healthy Bar Reef will enhance Kalpitiya's overall tourism competitiveness by offering diversified tourism activities that attract tourists who are not interested in participating in kitesurfing. (Empirical findings from site visit, consultations with Kitesurfing Sri Lanka and Vayu Resort.)

#### *Medium-term*

Tourism activity diversification (i.e., making diving competitive) requires preserving water quality, coastal biodiversity, and inland ecosystems, like mangroves, which are also vital in combating erosion, beach loss, and rising sea levels. Therefore, priority should be given to maintaining the health of natural marine and coastal tourism assets (Empirical findings from site visits, consultation with boat tour operators).

#### *Long-term*

Stable kitesurfing conditions. To maintain Kalpitiya's competitive advantage as a marine tourism destination, future development and beautification plans for the lagoon area must prioritize stable and advantageous conditions, with kite surfing as the anchor product (Empirical findings from site visits, consultation with CCD, Kitesurfing Sri Lanka, Vayu Resort).

### Conservation management recommendation

#### *Short-term*

Strengthen enforcement of existing regulations to support conservation practices in the fishery and tourism sectors and prevent unsustainable behaviours both onshore (indirectly, i.e., pollution) and at sea (directly, interactions with wildlife) (Empirical findings from site visits, consultation with boat tour operators, Kitesurfing Sri Lanka, Vayu Resort and Hoteliers).

Provide support for coral restoration and conservation projects to protect and restore vital coral ecosystems, i.e. Bar Reef rehabilitation to support the rejuvenation of marine biodiversity. (Empirical findings from site visits, consultation with Wildlife Officers, Kitesurfing Sri Lanka, Vayu Resort, and boat tour operators).

Strategically place buoys in ocean and harbour areas to demarcate fishing and tourism activities while also policing illegal fishing activities like dynamite fishing (especially when the health of Bar Reef is ultimately restored and marine species return) (Consultation with Conservation Officers, Navy, and INORA).

#### *Medium-term*

Address sustainability knowledge gaps within fishing communities to provide them with the tools and knowledge needed to operate in a way that sustains local marine biodiversity and their livelihoods. This should include knowledge transfer on sustainable fishing practices and the impact of dynamite fishing. (Consultation with Wildlife Officers).

<sup>27</sup> Floating lifeline to rescue dying Bar Reef. (n.d.). The Sunday Times Sri Lanka. <https://www.sundaytimes.lk/180513/news/floating-lifeline-to-rescue-dying-bar-reef-293881.html#:~:text=Bar%20Reef%20Marine%20Sanctuary%20covers,coral%20reefs%20around%20the%20island.>



### *Long-term*

Support scientific data collection and technological innovation to enhance monitoring and evaluation of tourism's impact on coastal and island ecosystems. This could include allocating funds towards projects aiming to improve data collection or tech solutions that target marine and coastal conservation (Consultation with the Institute of Ocean Resources Analysis, Kitesurfing Sri Lanka, Vayu Resort, Hoteliers, and dive boat tour operators in Kalpitiya).

Establish environmental indicators to measure, monitor and improve the health of the marine environment and generate quantitative data for marine tourism impact assessments. Such indicators will help improve the implementation of legislation and policies and provide a means of analysing data in a systematic, comparable, and organized manner. (Consultation with the Department of Coast Conservation and Coastal Resource Management, National Aquatic Resources Research and Development Agency, Hoteliers and tour operators in Kalpitiya).

## **Deliverable 4: Key Infrastructure Recommendations**

To maintain its status as an up and coming coastal destination, efforts must address Kalpitiya's challenges using an approach that aligns tourism and infrastructure development with conservation.

The following table provides a comprehensive list of Kalpitiya's main infrastructural needs followed by an overview of the responsible implementing authorities, and suggestions for the placement of infrastructure. This is further elaborated on in the short, medium and long-term recommendations to specify the value that infrastructural investments will add to the current tourism offering.

N.	Destination	Project Category	Type of infrastructure (Project)	Authority	Recommended Locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches & Harbour	Tourism Infrastructure	Public toilets (for tourist use)	Urban Development Authority (UDA), Provincial Council, Private Sector (PS), Sri Lanka Tourism Development Authority (SLTDA), Ceylon Fishery Harbours Corporation, CEA, CC&CRMD	Kudawa Beach, Blue Lagoon	Short-term	Hard infrastructure
			Drinking water (for tourist use)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, NWS&DB	Kudawa Beach, Blue Lagoon	Short-term	Hard Infrastructure or Investment
			Changing areas (for tourist use)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, DEP	Kudawa Beach, Blue Lagoon	Short-term	Hard infrastructure
			Whale-watching boats (to improve the standard of the tourism product, enhance tourist health and safety)	Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation Coast Guard, DEP, Department of Wildlife Conservation (DWLC)	Kudawa Beach	Medium-term	Hard infrastructure
			Tourism pier and jetty (to welcome additional boats)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, CC&CRMD	Kudawa Beach	Long-term	Investment
			Certification (i.e. Blue Flag, for promotional purposes)	SLTDA, Department of Wildlife , CCD, Coast Guard, Navy, Ministry of Tourism, CEA, Ceylon Fishery Harbours Corporation	Kudawa Beach, Blue Lagoon	Medium-term	Regulatory
			Yachting/ Sailing/ Boating regulations (to ensure that arrivals don't overburden carrying capacity, impact the marine environment...etc.)	SLTDA, Port Authority, Navy, Ministry of Immigration, Ministry of Tourism, CEA, Dept of Archeology, Ceylon Fishery Harbours Corporation, MEPA, CEA, DA, NWS&DB (National water supply & Drainage Board)	Kudawa Beach	Medium-term	Regulatory
			Shipwreck diving infrastructure (to raise the standard, maintain shipwrecks and prevent unsustainable activities)	Navy, SLTDA, Dept. of Archeology, Ceylon Fishery Harbours Corporation,	Kudawa Beach	Medium-term	Investment or Regulation
		Medical Infrastructure	Decompression chamber (for tourist/diver reassurance)	Dive centre, local tourism authority, SLTDA, Navy	Kudawa Beach	Short-term	Hard infrastructure
			Rescue facilities (rescue equipment/first aid kits for tourist health and safety)	Coast guard, dive centre, local tourism authority, SLTDA	Kudawa Beach, Blue Lagoon	Short-term	Hard infrastructure
		Waste Infrastructure	Waste bins (for waste collection, to prevent plastic pollution)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, MEPA	Kudawa Beach, Blue Lagoon	Short-term	Hard infrastructure

2	Town centre and outskirts	Regulatory Infrastructure	Support to combat coastal erosion (for the continuity of coastal tourism establishments)	CCD,National Aquatic Resources Resource Research and Development Agency (NARA) , Marine Environmental Protection Authority (MEPA), CEA, Ceylon Fishery Harbours Corporation	Kudawa Beach, Blue Lagoon	Short-term	Investment
3	Islands	Tourism Infrastructure	Public spaces/hubs (can be multi-purpose spaces for tourist exploration and additional activities)	UDA, Provincial Council, SLTDA, CEA, Dept of Archeology	Town	Long-term	Investment
			Open parks (for tourist and local use, activity diversification)	UDA, Provincial Council, CEA, CC&CRMD	Town	Long-term	Investment
			Shopping areas (to promote tourist spending in local economy)	UDA, Provincial Council, SLTDA, CEA	Town	Long-term	Investment
			Capacity Building	Vocational training schools/ programs (to upskill the community, provide additional job opportunities, secure a skilled tourism workforce)	Ministry of Tourism, Ministry of Education, SLTDA	Town	Medium-term
		Transportation infrastructure	Road enhancement (to improve roads, make it easier to navigate on the islands)	UDA, Road Development Authority (RDA), Provincial RDA, Local Authority	Town/outskirts	Medium-term	Investment
		Tourism infrastructure	Luxury resorts (to meet luxury tourist demands)	UDA, Ministry of Tourism, SLTDA, CEA, Ceylon Fishery Harbours Corporation, CC&CRMD	SLTDA	Medium-term	Investment
			Drinking water (for tourist use, to reduce the need for plastic bottled water)	UDA, SLTDA, CEA, Ceylon Fishery Harbours Corporation, NWS&DB		Short-term	Hard infrastructure
	Waste infrastructure	Campsite (tourism diversification)	Ministry of Tourism, SLTDA, CEA, Ceylon Fishery Harbours Corporation	Adjacent islands	Medium-term	Hard infrastructure or Investment	
		Waste bins (for waste collection, to prevent plastic pollution)	UDA, Provincial Council, PS, SLTDA, CEA, MEPA		Short-term	Hard infrastructure	

## Infrastructure Recommendations

### *Short-term*

Calculate carrying capacity studies/activity limitations. It is important to know how many tourists Kalpitiya can accommodate at one time, especially if international events such as kite surfing competitions are held, to avoid overburdening the area. Without capping carrying capacity, accommodations and the environment could face additional strain and, if continuous, an overloaded capacity with a negative impact felt by communities, infrastructure (water and sewage systems), and the environment (Empirical findings from desktop research)

Address immediate infrastructural needs: bathroom facilities, waste bins, rescue facilities/equipment, drinking water, and appropriate boats for whale watching. Additional basic and other infrastructure is needed in the areas in and around the Blue Lagoon to improve the tourism experience for kitesurfers. (Empirical findings from site visits, consultation with Kitesurfing Sri Lanka, Vayu Resort, and tour operators).

Improve transparency regarding the authorization of coastal structures and infrastructure development. Stakeholders shared that the process is not transparent, and there is little information about the authorization process for adding beach chairs, waste bins, or small huts online, adding to their frustration. Hence, there is a need to clarify and have a designated outlet for inquiries (Empirical findings from site visits and consultation with tour operators).

Counter-erosion strategies: Implement physical support infrastructure like sandbags to safeguard the beach area and combat coastal erosion. Many beach clubs and establishments in the Kalpitiya coastal area are losing beach-front at alarming rates, hence additional interventions are needed. (Empirical findings from site visits, consultation with the Department of Coast Conservation and Coastal Resource Management).

Duty-free inclusion of Sri Lankan-made kitesurfing equipment to support the local industry of suppliers and operators. Due to taxes imposed on EU-imported Sri Lankan-made kitesurfing, tourism operators lamented that equipment is expensive: an important factor that limits scalability. It is recommended to facilitate the purchase of equipment for local tour operators by allowing purchases to be made before export to the EU. However, VAT tax should still apply to 50% of purchases. (Consultations with kitesurfing tourism operators).

Develop a Short-term plan to attract private sector investment. Strategies should encourage investment in yachts and yachting infrastructure. (MAC Sri Lanka)

### *Medium-term*

Develop a high-end resort to cater to the luxury segment's demand and bridge the gap in the current market offerings, primarily attracting mid-range tourists. Plans have taken shape to develop a high-end resort in Kalpitiya, adding a luxury accommodation option to the area and other luxury amenities and services. The current status of this resort project is unknown. (Empirical findings from site visits, consultation with coast guards, and hoteliers).

Establish vocational schools or provide targeted training for local youths to fill gaps in the capacity for nature park guides and kite surfing instructors, which stakeholders claimed were facing shortages. Such skills training will also create job opportunities for local community members seeking entry into working in the tourism industry in Kalpitiya or other parts of Sri Lanka (Consultation with hoteliers).

Invest in road enhancements to support increased tourism arrivals, as roads currently need upgrades to support increased road traffic. This will also address stormwater drainage issues in Kalpitiya, improving the areas' resilience and ability to cope with climate change (Consultation with boat tour operators and hoteliers).

Extend and improve the current pier infrastructure to accommodate larger diving boats and marine vessels (such as whale-watching boats) in addition to a larger number of motor boats going to Kalpitiya's neighbouring islands (Consultation with boat tour operators).

Invest in renewable energy sources for resorts and hotels to improve energy security, also attracting eco-conscious tourists via sustainable branding. Supporting investments (for solar panels etc...) will support the area's resilience and self-sufficiency, reduce costs, and reduce reliance on the power grid (Empirical findings from scientific journals (Tourism in the Green Economy<sup>28</sup>, Role of Tourism in Promoting Geothermal Energy: Public Interest and Motivation for Geothermal Energy Tourism in Slovenia<sup>29</sup>, Consultation with Kitesurfing Sri Lanka & Vayu Resort).

Develop dining and shopping facilities in central areas to encourage longer stays from luxury-minded tourists. Apart from tourism activities (i.e., Kite-surfing), the area requires additional amenities to facilitate tourism spending, encouraging longer stays (Empirical findings from site visits, consultation with hoteliers).

### **Deliverable 5: Kalpitiya's Tourism Anchor Products**

With a reputation for kite surfing as its primary marine activity, Kalpitiya will continue to see a steady flow of tourists choosing the destination for its advantageous conditions around the lagoon. Therefore, future tourism development and beautification plans concerning the lagoon area must prioritize that conditions remain consistent. As long as this is maintained, kite surfing as an anchor product will ensure Kalpitiya's competitive advantage as a marine tourism destination.

Apart from water-based activities, additional tourism growth will likely stem from the diversification of tourism products and services that enhance the tourism experience, i.e., resorts, hotels, restaurants, and spas in the areas frequented by kite surfers and in Kalpitiya's adjacent islands. Here, spatial and zonation plans will play a pivotal role in preventing decreases in the water quality and coastal biodiversity, especially island ecosystems like mangroves, which are crucial for combating erosion, beach losses, and rising sea levels. Additional considerations will need to be made for managing and protecting Bar Reef Marine Protected Area and its marine wildlife while keeping other popular industries, such as snorkeling and diving competitive. Kalpitiya's smaller islands provide the opportunity for luxury accommodations such as water bungalows, which are able to attract new tourism markets to Kalpitiya.

### Kitesurfing/Surfing

Kalpitiya's main tourist draw is its kitesurfing, although, surfing, which has a lesser-known reputation in Kalpitiya, also has the potential to draw tourists who are looking for a quieter and off the beaten path area to surf in.

For this, the following strategies should be employed:

- Highlight (online) the sustainability efforts by kitesurfing providers, including tree planting and crop cultivation projects, encouraging surfers to participate and support these initiatives (Consultation with Kitesurfing Sri Lanka, Vayu Resort, and other tour operators).
- Enable local participation in kitesurfing and surfing, encouraging them to embrace these activities as part of their lifestyle, to build a destination-wide reputation for these water sports. (Insights from Marine Tourism Steering Committee).
- Invite influential surfers to Kalpitiya and have them teach the sport to local children, promoting community involvement and fostering a local surfing culture (Consultation with Kitesurfing Sri Lanka and Vayu Resort).
- Promote Kalpitiya as an ideal destination for surfers to enjoy the sport in a less crowded environment

<sup>28</sup> *Tourism in the green economy.* (n.d.). Routledge & CRC Press. <https://www.routledge.com/Tourism-in-the-Green-Economy/Reddy-Wilkes/p/book/9781138095632>

<sup>29</sup> Pavlakovič, B.; Rančić Demir, M.; Pozvek, N.; Turnšek, M. Role of Tourism in Promoting Geothermal Energy: Public Interest and Motivation for Geothermal Energy Tourism in Slovenia. *Sustainability* 2021, 13, 10353. <https://doi.org/10.3390/su131810353>

- (Empirical findings from site visit, Consultation with Kitesurfing Sri Lanka, and Vayu Resort).
- Host training camps for professional surfers and kite surfers to attract talent and establish Kalpitiya as a prominent hub for these sports (Empirical findings from site visit, Consultation with Kitesurfing Sri Lanka and Vayu Resort).

## Diving/ Shipwreck Diving

While Kalpitiya's diving industry is centred around the Bar Reef, (which in its current state is degraded, hence not attractive to tourists). Shipwreck diving, on the other hand, is a promising alternative with the power to reinvigorate Kalpitiya's diving industry.

It is recommended to promote shipwreck diving using the following strategy:

- Offer diving certification programs to provide safe and skilled diving experiences to tourists (Consultation with shipwreck diving stakeholders).
- Promote coral framing programs to create additional shipwrecks and diving experiences, ensuring coral sustainability, fostering a sustainable tour business, and offering educational opportunities to tourists (Consultation with INORA, information obtained from Sri Lanka Sub Aqua Club<sup>30</sup>)
- Provide diving information at tourist centres in Colombo and major cities, along with online promotion, considering the significant number of yachts and tourists entering the country from Colombo. (Empirical findings)
- Invite influencers and bloggers to Kalpitiya with discounted prices in exchange for online promotion of their experiences (Consultation with Kitesurfing Sri Lanka & Vayu Resort).

## Boating/ Sailing/ Yachting

Once the capacity for welcoming marine vessels has increased, Kalpitiya will be ready to promote itself as a boating/yachting destination.

Then it will be possible to:

- Contact international yacht associations and yacht clubs to advertise Kalpitiya and Sri Lanka as a destination for boating, sailing, and yachting enthusiasts. (Empirical findings)
- Enhance the availability of yachts and boat rentals from accommodations and increase the capacity to organize on-water events, such as birthday celebrations, providing additional guest experiences (Findings from the survey, consultation with hoteliers).

## Wildlife Watching

With whales and dolphins frequenting the area, Kalpitiya is able to offer wildlife-watching tours to tourists as an "off-season" activity, further diversifying its tourism offering.

To promote wildlife watching, it is recommended to:

- Promote the area's high probability of witnessing dolphins and other marine mammals through social media (Empirical findings based on site visit).
- Target marine biologists to conduct research on the marine ecosystem's tourism impact, leading to increased name recognition for the area through their published articles (Empirical findings based on site visit).
- Advertise wildlife-watching tours conducted by local fishermen, offering tourists an authentic and immersive experience of the local area's natural beauty (Empirical findings based on-site visit, insights from informal discussion in Mawella).

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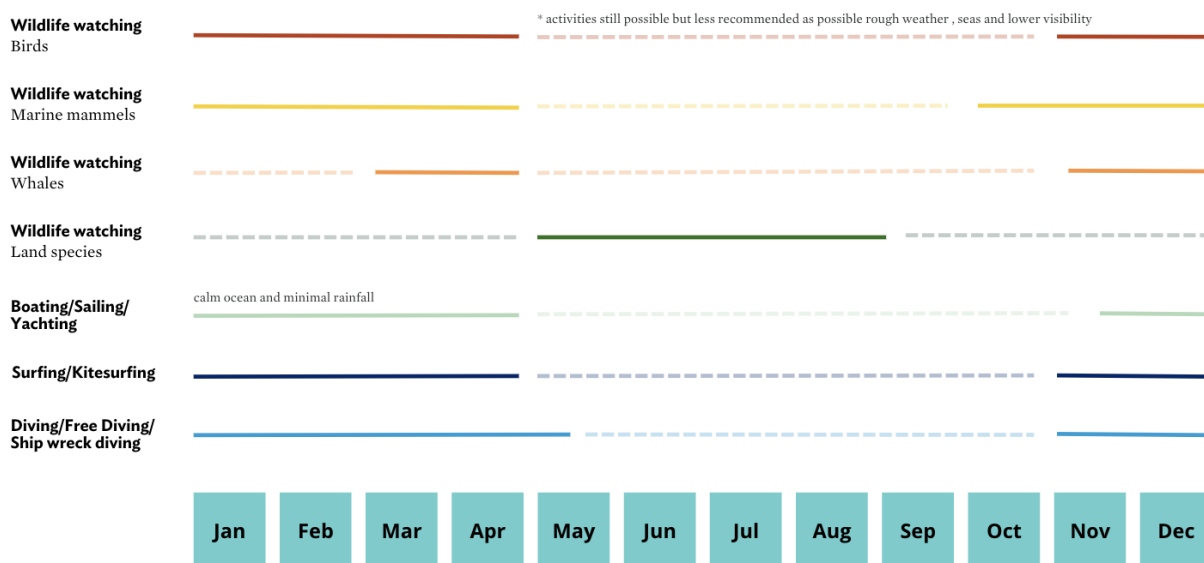
<sup>30</sup> Dharshana Jayawardena. (2022, January). *Tourism revenue potential of wrecks: Age of Steam & World War Wrecks in Sri Lanka* [Slide show].



## Kalpitiya's seasonality

With kite surfing conditions advantageous year-round, Kalpitiya is uniquely positioned to build its reputation around being open to tourists in both the winter and summer months. As boating, surfing, and diving are considered to be optimal in the winter season, Kalpitiya will be able to leverage these activities to attract tourists arriving in nearby Colombo. Being a lesser-known destination than more well-known destinations in the south and east, efforts will need to be made to build the destination's reputation, first for its core anchor product, kitesurfing, and then for its other activities and attractions. Additional activities featured around island discovery, wildlife sightseeing, and academic exploration are suggested to be developed and incorporated into Kalpitiya's tourism offering to attract different subsets of tourists throughout the year.

## Seasonality of Kalpitiya's Tourism Products



Besides Kalpitiya's anchor products, alternative activities to combat seasonality could include:

- Exploration/ tours/ camping on small islands (eventually resort & luxury amenities and activities)
- Gastro tourism (cooking classes or tours of local eateries)
- Conservation programs (hands on voluntourism style projects, planting mangroves, seagrass...etc.)
- School field trips (for domestic and international schools abroad) to explore Kalpitiya, it's history and attractions
- Events and festivals. (Internationally-promoted events such as kitesurfing competitions)
- National parks, night safaris (in proximity)

## Summary of infrastructure needs (per tourism activity)

Type of activity	Infrastructure gaps and needs	Time line (Prioritization)	Strategy	Recommended locations	Presently Existing	Promotional recommendations
Kite surfing	Kalpitiya is not easily accessible Needs institutional and legislative support Entrepreneurship development Tax waiver on Sri Lankan-made kitesurfing equipment (to make equipment available for purchase in SL not imported from the EU)	Short-term	Capacity building for local instructors Mangrove planting and maintenance initiatives (to prevent overgrowth and ensure stable conditions)	Kudawa Beach, Blue Lagoon	Yes	International Competitions magazines,promotional campaigns
Diving/ Free diving/ Snorkeling/ Shipwreck diving	Conservation efforts for Bar Reef Decompression chambers Rescue kits Changing areas Diving equipment Facilities to certify divers	Short/ Medium-term	Facilitate conservation and coral restoration projects Supply hard infrastructure Waste processing (to maintain water quality)	Kudawa Beach, Blue Lagoon	Diving/ Snorkelling -Yes Shipwreck diving- minimal	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Boat tours/ Wildlife sightseeing	Tourism pier and jetty Whale watching boats (two level, like those used primarily in Mirissa) Awareness on marine wildlife	Short/ Medium-term	Install hard infrastructure Studies/ monitoring of impact of tourism on whales Move unused whale watching boats from Mirissa to Kalpitiya Tourism communication (and training and capacity building on wildlife interactions and behavioural patterns) ©	Kudawa Beach, Blue Lagoon	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Niche voluntourism experiences	Community engagement and facilitation Support/capacity building for the Promotion of voluntourism activities	Short-term	Mangrove planting initiatives Coral restoration projects Enabling entrepreneurship Community-based tourism development	Kudawa Beach, Blue Lagoon	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic Partnering with local and international NGO's and universities
Tour packages	Development of tourism itineraries linking activities Cross promotion with accommodations	Short-term	Collaboration with tourism operators Shipwreck diving themed packages Accommodations promote packages	Kudawa Beach, Blue Lagoon	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc.)
Resort-based activities	Accessibility by boat from mainland to reach island resort(s) Activity diversification	Long-term	Hard infrastructure investment Half day activities (yoga, wellness, cultural events, shopping..etc..)	Kudawa Beach, Blue Lagoon	No	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc.)

## Development Strategies

### Short-term

- Ecological restoration programs, wildlife management strategies, beach cleanup efforts to preserve the environment, conserve wildlife, and spread awareness on plastic pollution (Empirical findings based on site visits, consultation with hoteliers, and the Department of Coast Conservation and Coastal Resource Management).
- Establish a clear licensing procedure for tourism service providers and implement an incentivized process for formalizing sectors with the goal in mind of improving transparency (Empirical findings from site visits, consultation with tour operators, and Governance Performance in Integrated Coastal Management, Sri Lanka Country Report<sup>31</sup>).
- Integrate diving with fishing tours to enhance the tourist experience while also allowing fishermen to diversify their livelihoods and share their knowledge with tourists (Empirical findings from site visits, consultation with boat tour operators, and wildlife officers).
- Provide tax waiver for domestic kitesurfing manufacturers to reduce the cost of purchasing kitesurfing equipment. It is recommended that a VAT tax should still apply to 50% of purchases to benefit local producers, tourism operators and the government. (Consultations with kitesurfing tourism operators and Comments from Chamber of Marine Industries in a meeting with the Marine Tourism Steering Committee).
- Create additional dive sites to increase diving tourism attractiveness, especially prior to restoration efforts being carried out on the Bar Reef and as sites that are complementary to the adjacent shipwrecks (comments during the Marine Tourism Steering Committee, empirical findings during site visit and consultation with kitesurfing tourism operators).
- Revise current port access regulations so that boats can stop at Kalpitiya before passing through Colombo (Consultations with Sail Lanka).
- Re-purpose unused two-story whale-watching boats in Mirissa to raise the safety standards of boats being used for whale-watching activities. (Empirical findings, insights from meeting with whale watching operator in Mirissa)

### Medium-term

- Multi-day shipwreck diving tours designed around specific themes (i.e. World War 2), integrating with land-based activities such as exploring cultural and historical heritage, buildings, museums, monuments, and national parks. (Consultation with shipwreck diving operator)
- Offer unique tourism products like private on-water yacht events and wellness activities, capitalizing on tourists' interest in yoga, fitness, and art festivals while showcasing the region's rich culture and history. (Consultation with SLTDA and insights from the Kalpitiya Integrated Resort Development Plan<sup>32</sup>)

### Long-term

- Develop the surrounding islands to establish resorts and additional accommodations while offering multi-day tours, activities, and eco-tourism experiences. Such development will also diversify Kalpitiya's appeal to tourists apart from those interested in kitesurfing. (Consultation with SLTDA)

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<sup>31</sup> De Silva, S., Sellamuttu, S. S., Kodituwakku, D. C., & Atapattu, S. (2011). *Governance Performance in Integrated Coastal Management: Sri Lanka Country Report*. IUCN (International Union for Conservation of Nature) Sri Lanka Country Office. <https://publications.iwmi.org/pdf/H044787.pdf>

<sup>32</sup> *Integrated Tourism Resort Program Kalpitiya – Investment Opportunities – Board of Investment of Sri Lanka*. (n.d.). <https://investsrilanka.com/kalpitiya-integrated-tourism-resort-program/>

## Deliverable 3: Spatial and Zonation Plans

Galle's main tourism offerings (diving, snorkeling and surfing) are centred around the marine environment, therefore measures need to be taken to preserve the area's marine assets. Without actively combating the challenges facing Greater Galle's snorkeling and diving industries, water-based tourism will lose its appeal, significantly impacting the competitiveness of the marine tourism industry. Galle's surf beaches are also under threat from development, therefore requiring the re-evaluation of plans to ensure that surfing remains viable and the destination remains a lucrative surf tourism destination.

### Zoning Recommendations

#### Short-term

- Establish clear demarcations for coastal and marine areas to be designated for tourism use, reducing conflicts with the fishery industry (Empirical findings from site visits, Consultation with water sport operators, representatives of water sports association, and other tourism stakeholders at the beaches).
- Evaluate the Galle Port City plans to assess their impact on surf tourism and the livelihoods of tourism service providers in the area designated for development (Consultation with coastal tour operators and insights from surf beach meeting).
- Perform an assessment of erosion caused by sand-filling to understand its impact on the environment better, avoid causing further harm, and allocate support to areas that will increasingly come under pressure (Empirical findings from site visit, news article<sup>33</sup>).
- Formalize informal tourism service providers to regulate the sector, have a more accurate understanding of the quantity of tourism service providers, prevent unsustainable activities, and provide support and capacity building to such businesses (Meeting with tour and hotel operators and high-level tourism stakeholder).

#### Medium-term

- Implement urban planning strategies to disperse tourists and distribute economic benefits through the Secondary Cities Project, to prevent over-tourism, overburdening carrying capacity, by spreading tourism spending throughout different zones (Sri Lanka: Managing Coastal Natural Wealth Report<sup>34</sup>).
- Develop Smart Growth Centres to expand marine tourism offerings and experiences around the unique contexts of each area (Greater Galle Development Plan 2019-2030<sup>35</sup>).
- Focus on increased eco-tourism development, adding infrastructure and eco-tourism accommodations within the tourism corridor pockets and tourism zones.

#### Long-term

- Strengthen port infrastructure with the Galle Port Development Project (GPDP) to welcome luxury tourists and yachts to Galle with amenities and facilities to meet their needs (Empirical findings from site visit, Galle Port Development Project<sup>36</sup>).
- Implement a Disaster Risk Management plan that aims to protect Galle's marine tourism competitiveness and industries, including tourism assets that could be at risk as a result of natural disasters or rising tides (Empirical findings, Greater Galle Development Plan 2019-2030<sup>37</sup>).
- Support tech-based solutions using GIS modeling to adapt development plans and coastal regulations based on climate change and sea-level projections. Modeling should additionally be

33 NewsIn.Asia. (n.d.). Another Port City in Galle. <https://newsin.asia/another-port-city-in-galle/>

34 Sri Lanka: Managing Coastal Natural Wealth. (2017). World Bank. <https://documents1.worldbank.org/curated/ar/935641540997593260/pdf/131555-WP-P156769-PUBLIC-SL-Coastal-Report-27Aug2018.pdf>

35 Greater Galle Development Plan 2019-2030. (2019). UDA District office, Galle. [https://www.uda.gov.lk/attachments/devplan\\_detailed/Development%20Plans%202019-2030/Galle/English.pdf](https://www.uda.gov.lk/attachments/devplan_detailed/Development%20Plans%202019-2030/Galle/English.pdf)

36 Sri Lanka Ports Authority - About. (n.d.). <https://www.slpa.lk/port-colombo/galle>

37 Greater Galle Development Plan 2019-2030. (2019). UDA District office, Galle.

used to predict how jetties, marinas, ports, or other projects will impact the coastline and their assets (Meeting with Institute of Ocean Resources Analysis, Empirical findings from site visits)

## Conservation Management Recommendations

### *Short-term*

- Strengthen enforcement against unregulated and illegal tourism activities (i.e., whale diving) should be eradicated. On top of this, enforcement should penalize tourism operators offering such experiences (Meeting with various tour operators in Galle).
- Provide monetary and technical support to turtle conservation projects and organizations supporting science-backed, authorized, and regulated turtle conservation centres and hatcheries to conserve the local sea turtle populations and involve tourists in conservation activities (Consultation with local turtle hatcheries, tour operators).
- Initiate local municipality-led cleanups on top of community-wide cleanups to address environmental issues, especially plastic pollution, side by side with a broader waste management plan and process (Empirical findings from on-site visits, insights from surf beach meeting, hoteliers, and tour operators).
- Share knowledge on harmful fishing practices within the fishing community through training and capacity-building workshops or other awareness campaigns to mitigate unsustainable behaviours, including polluting (meetings with beach operators and informal sector stakeholders)
- Launch campaigns and counter-narratives to dispel misconceptions that fishermen are solely responsible for plastic pollution and instead help the community tackle the issue as a whole through forums or other collaborative sessions (Empirical findings from on-site visit).

### *Medium-term*

- Launch and provide technical support for coral revival planting projects to restore coral reefs and maintain tourism activities such as diving. Involve scientists, interns, tourists, and locals in locally-led projects to sustain outcomes (Empirical findings from on-site visit, consultation with tour operators).
- Strengthen whale conservation efforts by the wildlife department. This entails conducting more research, raising awareness, and implementing stricter regulations on whale-watching tourism activities to protect whale species (Meetings with whale-watching tour operators, hoteliers, and turtle hatchery)

### *Long-term*

- High-level knowledge-sharing on the value of dive tourism in the form of a one-pager or other document demonstrating the need to take measures to sustain the dive industry for economic and environmental benefits. Stakeholders expressed concern that the value of dive tourism was vastly underestimated by decision-makers, hence requiring additional awareness raising (Empirical findings from on-site visit, and Unawatuna beach stakeholders)

## **Deliverable 4: Key Infrastructure Recommendation**

Differing from Kalpitiya, Galle is a frequent stop on the main tourism route through the south coast, attracting tourists interested in history (Galle Fort), culture, and shopping opportunities. With a plethora of coastal beach areas that support leisure activities and water based sports like surfing and diving, Galle and the extended Greater Galle area have the potential to capture a wide variety of tourists with their current offering.

Similar to the other coastal areas and target destinations in Sri Lanka, Galle has significant infrastructural gaps, including basic public facilities in beach areas and tourist attractions such as artificial dive sites. The most immediate needs for the Greater Galle area include bathroom facilities, potable water for tourist use and waste processing infrastructure to cope with plastic pollution. The table below underlines each infrastructural need, followed by strategies for each suggested development.

N.	Destination	Project category	Type of infrastructure (Project)	Authority	Recommended Adjacent Locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches	Waste infrastructure	Waste bins (to prevent plastic pollution)	UDA, Provincial Council, PS, SLTDA, CEA, Ceylon Fishery Harbours Corporation, MEPA	Hikkaduwa, Ventura Beach, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Short-term	Hard infrastructure
		Sewage/waste infrastructure	Sewage/waste processing system (to prevent pollution)	UDA, Provincial Council, PS, SLTDA, CEA, Ceylon Fishery Harbours Corporation with the assistance of CEA, MEPA	Hikkaduwa, Ventura Beach, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Short-term	Investment
		Tourism Infrastructure	Artificial dive sites (like chess board and shipwrecks, to diversify diving offering)	SLTDA, Dept of Archeology, Ceylon Fishery Harbours Corporation, CC&CRMD	Hikkaduwa, Ventura Beach, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Medium-term	Investment
			Tourist information centre (to share information on tourist attractions)	Provincial Council, SLTDA	Hikkaduwa, Ventura Beach, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Medium-term	Hard infrastructure/ investment
			Public sunbeds (for tourist satisfaction)	Provincial council, CC&CRMD	Hikkaduwa, Ventura Beach, Unawatuna, Weligama, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle	Medium-term	Hard infrastructure
			Lifeguards and special jet skis with rescue capabilities (for tourist health and safety)	Coast guard, dive centre, local tourism authority, SLTDA, Navy, Ceylon Fishery Harbours Corporation	Hikkaduwa, Ventura Beach, Unawatuna Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Short-term	Hard infrastructure
			Decompression chamber (for tourist reassurance)	Dive centre, local tourism authority, SLTDA, Navy	Hikkaduwa Beach, Unawatuna Beach	Short-term	Hard infrastructure
			Permanent anchoring system (to avoid hard caused to coral reefs)	CCD, Navy, CEA, Ceylon Fishery Harbours Corporation, DFAR	Hikkaduwa Ventura Beach, Unawatuna Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Short-term	Hard infrastructure
			Shipwreck diving infrastructure (to promote the activity and raise standard)	Navy, SLTDA, Ceylon Fishery Harbours Corporation, NADA, MEPA, Ministry of Tourism, Dept of Archaeology, CC&CRMD, CEA	Hikkaduwa Ventura Beach, Unawatuna Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Medium-term	Investment/ Regulation
			Certification (i.e.. Blue Flag, for tourism promotion)	SLTDA, Department of Wildlife, CCD, Coast Guard, Navy, Ceylon Fishery Harbours Corporation, NADA, MEPA, Ministry of Tourism, CEA, UDA, NWS&DB	Hikkaduwa Beach, Ventura Beach, Unawatuna Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Medium-term	Regulatory



2	Harbour (Galle & Mirissa)	Waste infrastructure	Waste bins (for waste collection)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, MEPA	Galle Harbour, Mirissa Harbour	Short-term	Hard infrastructure
		Tourism infrastructure	Public toilets (for tourist use)	Urban Development Authority (UDA), Provincial Council, Private Sector (PS), Sri Lanka Tourism Development Authority (SLTDA), Ceylon Fishery Harbours Corporation, CEA, CC&CRMD	Galle Harbour, Mirissa Harbour	Short-term	Hard infrastructure
			Drinking water (for tourist use)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, NWS&DB	Galle Harbour, Mirissa Harbour	Short-term	Hard infrastructure/ Investment
			Changing areas (for tourist need)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA	Galle Harbour, Mirissa Harbour	Short-term	Hard infrastructure
			Tourism pier and jetty, Harbour space/ jetty (for docking)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA, NADA, MEPA, Min. of Tourism, SLPA, CC&CRMD	Galle Harbour, Mirissa Harbour	Long-term	Investment
			Cruise terminals (for tourist processing and tourism activities)	UDA, Ministry of Tourism, SLTDA, Ceylon Fishery Harbours Corporation, CEA, NADA, MEPA, Ministry of Tourism, SLPA (Sri Lanka Port Authority), CC&CRMD	Galle Harbour, Mirissa Harbour	Long-term	Investment
		Regulatory infrastructure	Separate berth to operate yachts (prior to GPDP project)	UDA, Ministry of Tourism, SLTDA, Ceylon Fishery Harbours Corporation, CEA, NADA, MEPA, Ministry of Tourism, SLPA (Sri Lanka Port Authority), CC&CRMD	Galle Harbour	Short/Medium-term	Investment
			Boat alternatives for fishermen (to reduce their reliance on kerosene and improve water quality)	UDA, CCD, Provincial Council, SLTDA, CEA, DFAR, CFHC	Galle Harbour, Mirissa Harbour	Short-term	Investment
			Buoys (for demarcation)	Navy, CCD, Ceylon Fishery Harbours Corporation, DFAR, DWLC	Hikkaduwa Beach, Ventura Beach, Unawatuna Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Short-term	Hard infrastructure
			Yachting/ Sailing/ Boating regulations (to ensure that arrivals don't overburden carrying capacity, impact the marine environment...etc.)	SLTDA, Port Authority, Navy, Min. of Immigration, Min. of Tourism, CEA, Dept of Archeology, Ceylon Fishery Harbours Corporation, NADA, MEPA, Min. of Tourism	Beach, Weligama Beach, Secret Beach, Mirissa Beach, Dickwella Beach, Hiriketiya Beach, Silent Beach, Tangalle Beach, Mawella Beach	Medium-term	Regulatory

## Infrastructure Recommendations

### *Short-term*

- Carrying capacity and activity limitation study, it is recommended to conduct an up to date study on the Greater Galle Area's carrying capacity to inform plans aimed at increasing tourism arrivals and developing additional infrastructure for marine vessels i.e. ports, terminals etc..
- Address immediate infrastructural needs, including rest-rooms, changing rooms, waste processing (especially for plastic pollution), and potable water facilities in areas that tourists frequent, but especially beach areas (Empirical findings from on-site visit, meetings with tour operators)
- Establish lifeguard and rescue infrastructure, including a decompression chamber to treat decompression sickness, to enhance tourist health and safety to provide tourists more peace of mind when taking part in water-based activities (surfing and diving) (Empirical findings from on-site visit, insights from surf beach meeting)
- Simplify the process of introducing waste infrastructure by enabling trash cans to be requested by tourism stakeholders for areas struggling to cope with pollution (Consultation with informal stakeholders, hoteliers, turtle hatchery and tour operators)
- Clarify and streamline the licensing and authorization process for tourism-related activities, including tour guiding, sports instructions etc.. (Consultation with beach operators)
- Implement a permanent anchoring system that marine vessels can link up to prevent harm being done to the seabed from repeated anchoring.
- Promote the use of green boat alternatives for fishermen and tourism operators to mitigate kerosene pollution in areas frequented by boats and build support for the uptake of additional eco-friendly practices. This will improve water quality while simultaneously “greening” the local tourism sector (Consultation with beach operators)
- Duty-free inclusion of Sri Lankan-made kitesurfing equipment to support the local industry of suppliers and operators. Due to taxes imposed on importing boats, tourism operators, including Sail Lanka and the Chamber of Marine Industries lamented that the duty on imported boats is too costly to be lucrative. It was suggested by stakeholders that 50% of materials should be subjected to VAT tax (in foreign currency) with the rest of Sri Lankan-made materials being exempt to benefit local producers, tourism operators and the government. (Consultations with Chamber of Marine Industries).
- Create a separate berth to operate yachts (prior to GPDP project), ensuring that the vicinity is environmentally friendly and free from pollution to meet the standards for luxury yachts and their clientele. (MAC Sri Lanka)

### *Medium-term*

- Install sea bin or bubble barrier technology in the river by Unawatuna and other waterways to capture solid waste effectively and alleviate pollution from waste making its way into beach areas and then out to sea (Empirical finding from on-site visit, Insights from surf beach meeting.)
- Create artificial underwater dive sites strategically placed in areas that are easily accessible to tourists and near beaches rather than being located far offshore in inconveniently placed locations (Consultation with Unawatuna beach stakeholders).
- Establish a tourist information centre to provide information on the types of tourist activities available at the destination and in the surrounding areas with details to help tourists make bookings and locate sites of interest. The visitor centre should also promote recreational yachting and boating to attract luxury and lifestyle tourists. (Empirical findings from on-site visit, Consultation with beach operators, comments from with Chamber of Marine Industries in meeting with Marine Tourism Steering Committee)
- Install public sunbeds for the comfort and convenience of leisure tourists (Empirical findings from on-site visit, Consultation with informal stakeholders).
- Construct weather-proof shelters to protect tourists and tourism operators from adverse weather conditions such as torrential rains during monsoon season (Consultation with surf/windsurf instructors).

### *Long-term*

- Cruise terminal. A cruise terminal would bring more tourists to Galle and the Greater Galle area, yielding economic benefits for the area. Although, a carrying capacity assessment is needed as a preliminary step to determine the feasibility of the size, scope and impact on the surroundings of the proposed terminal (Greater Galle Development Plan 2019-2030<sup>38</sup>, Insights from Marine Tourism Steering Committee meeting)
- Processing for arrivals to Galle Harbour. There is a need to streamline customs by having better facilities for passengers arriving at Galle Harbour. The lack of effective immigration processing will continue to prevent investors from developing the area: a major barrier to development thus far. (Comments from with Chamber of Marine Industries in meeting with Marine Tourism Steering Committee)
- Harbour space/jetty for docking. Additional docking spaces are needed to welcome marine vessels and an increased number of tourist arrivals (Greater Galle Development Plan 2019-2030<sup>39</sup>, Empirical findings from site visit)
- Separate docking area for tourism vessels to avoid conflict with areas used by fishermen (Consultation with whale-watching operators).

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<sup>38</sup> Greater Galle Development Plan 2019-2030. (2019). UDA District office, Galle. [https://www.uda.gov.lk/attachments/devplan\\_detailed/Development%20Plans%202019-2030/Galle/English.pdf](https://www.uda.gov.lk/attachments/devplan_detailed/Development%20Plans%202019-2030/Galle/English.pdf)

<sup>39</sup> Ibid.

## **Deliverable 5: Galle's Tourism Anchor Products**

Holding historical importance that dates back to the Dutch colonization era, Galle is home to landmarks and the Dutch Fort, a UNESCO World Heritage Site. Beyond its city centre, the Greater Galle area provides diverse landscapes including thriving paddy marshlands and vast stretches of beaches. Galle's other natural features, especially its long coastline of prized surf beaches, are one of the area's biggest tourism draws.

The anchor products outlined in the following section have been selected based on (Greater) Galle's most popular tourism activities and those that could be developed as a means of mitigating seasonality by attracting tourists during the off-season months.

### **Boating and Wildlife Tours**

The presence of whales in the area enables tourists the unique opportunity to take part in whale watching, an activity capable of further diversifying Galle's tourism offering.

However, these tours should be promoted:

- Only once the decision has been made to enhance regulations around interactions with whales and other marine species to prevent illegal activities that drive whales away from the area. (Empirical findings, meeting with key tourism stakeholders).
- The tourism board should document and showcase the process through its social media accounts and website to enhance transparency around conservation practices. This will ensure that experiences are regulated and sustainable. (Empirical findings, meeting with key tourism stakeholders).

### **Diving/Snorkeling/Shipwreck Diving**

The Greater Galle area has a well-established reputation for diving activities thanks to its nearby reefs and other marine biodiversity. Shipwreck diving and other niche diving experiences to artificial sites provide the opportunity to expand the current offering. Specialized itineraries and tours that tie dive sites with other historical and other sites of interest have the ability to add to Galle's appeal to lifestyle divers and diving enthusiasts.

- The tourism board could collaborate with tour operators to create multi-day tours leaving from Galle harbour. These tours could feature diving excursions to multiple historical wrecks coupled with visits to museums and cultural sites (Empirical findings from on-site visit).
- The tourism board should actively promote the upcoming underwater art gallery in Unawatuna to attract more visitors to the site (Consultation with Unawatuna beach stakeholders).

### **Marine Heritage and Cultural Sites**

Galle has a variety of cultural heritage sites, maritime museums, and other historical sites for tourists to learn about Galle's unique history and culture as a maritime tourism hub.

Therefore:

- Cultural heritage tours should be integrated into other activities, such as diving or yacht cruise tour packages (Empirical findings).
- The tourism board should capitalize on its UNESCO World Heritage site status to brand attractions like the Dutch Fort, Dutch Church, Galle Lighthouse, and Mansion Museum as essential cultural tourist experiences (Empirical findings).

### **Yacht/Cruise Tourism**

With high quality infrastructure, accommodations, restaurants and other amenities available, Galle can leverage this to attract high-spending yachting tourists seeking authentic and luxury-minded experiences.

Yachting tourism development should take the following into account:

- Information should be spread about the Galle Port City development through social media, yachting magazines, and by reaching out to yacht clubs and cruise companies globally to gather feedback on the project and attract investment (Empirical findings).
- The tourism board should collaborate with SailLanka to market Galle as an attractive destination for extended stays, offering marine activities, turtle hatcheries, and visits to cultural heritage sites (Empirical findings).
- Sri Lanka tourism board should equip the private sector with international marketing capacity to promote Galle Port as a cruise destination, leveraging joint ventures. (MAC Sri Lanka)
- Facilitate yacht-related job opportunities for repair and refit centres etc.. (MAC Sri Lanka)

## Surfing

Surf tourism in the Greater Galle Area is well established with surfers from around the world flocking to the south coast during the high season.

Further promotion could draw in more surf tourists and enhance the current surf tourist satisfaction:

- Organize surf competitions and training camps for professional surfers to gain international recognition as a surfing destination (Replicating international surf events held in Trincomalee).
- Introduce surfing classes in local schools to promote the sport as a lifestyle (Empirical findings)
- Establish the area as a safe surfing spot by increasing the number of lifeguards (Consultation with tour operators).
- Must increase the number of lifeguards to recognize the area as a safe surfing spot (Consultation with tour operators).
- Offer digital payment options for surf-related services to enhance convenience for visitors (Insights from Surf beach meeting)

## Leisure beach activities

Galle's many beaches are lucrative for leisure tourists, supported by activities such as guided tours, exploration (viewpoints), and other water-based activities, including snorkeling.

The tourism board should actively promote Unawatuna and other places in Galle as year-round beach destinations offering diverse activities such as fishing tours, diving, whale watching, and shipwreck exploration (Empirical findings).

Provide sunbeds at the beaches (Empirical findings from on-site visit, Consultation with informal stakeholders).

## Citizen science and voluntourism

Galle's conservation organizations have the opportunity to receive additional hands-on support via internships from researchers and university students with an expertise in conservation. Voluntourism experiences can attract sustainability-minded tourists interested in taking part in conservation activities.

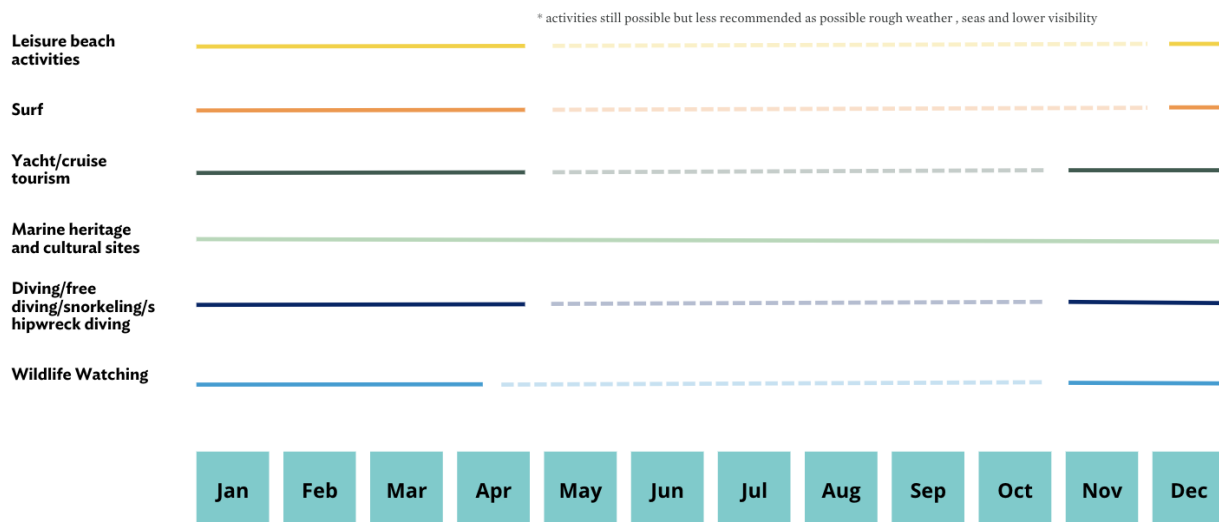
This can be facilitated by:

- The Sea Turtle Hatchery actively promotes its conservation activities on social media and engages local school children in hands-on conservation efforts to raise awareness about protecting turtles and other marine species (Empirical findings).
- Involving local biologists and promoting community participation in marine conservation efforts to minimize the disconnect between the locals and facilitate understanding about the environmental and economic importance of the ocean and marine biodiversity (Empirical findings).

## Galle's Seasonality

Galle's leisure activities, including sightseeing, museum visits, culinary tours, shopping activities, and year-round sunbathing are some of the area's biggest tourism competitiveness factors. Apart from these activities, water-based activities in the Greater Galle area, such as surfing and leisure beach activities, are possible and desirable during the summer as less overcrowding leads to a calmer beach environment. It is suggested to support the creation of experiences such as cooking classes, crafting workshops, festivals/events, and other community-led activities to provide tourists with activities to participate in during the offseason, while encouraging them to extend their stay.

### Seasonality of Galle's tourism products



#### Alternative activities to combat seasonality

- Religious tourism to historical temples, houses of worship...etc (Empirical findings).
- Heritage site visits, can be year-round, and can attract tourists during monsoon season (Empirical findings).
- Gastronomy tours and cooking classes (Empirical findings).
- Festivals and events (Empirical findings)



## Summary of Galle's infrastructure needs per tourism activity

Type of activity	Infrastructure gaps and needs	Time line (prioritization)	Strategy	Recommended locations	Presently existing	Promotional recommendations
Diving/ free diving/ snorkelling/ shipwreck diving	Underwater dive sites Decompression chambers Permanent anchoring systems Rescue kits Changing areas Diving equipment Facilities to certify divers	Short-term	Hard infrastructure Investment Waste processing (to maintain water quality)	Hikkaduwa, Unuwatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Diving/ Snorkelling -Yes Shipwreck diving- minimal	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Surfing	Basic beach infrastructure Livelihood preservation Sector formalization	Short-term	Preservation of the surf point Transparent permitting and licensing process	Hikkaduwa, Unuwatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya Silent Beach, Tangalle, Mawella Beach	Yes	International Competitions magazines, promotional campaigns
Boat tours/ Wildlife sightseeing	Cruise terminal/jetty for docking Studies/monitoring of impact of tourism on whales	Medium/Long-term	Hard infrastructure Investment Scientific studies	Mirissa Harbour	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Leisure beach activities	Tourist information centre Sun beds	Short/ Medium-term	Hard infrastructure	Hikkaduwa, Unuwatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Niche voluntourism/ citizen science activities	Support/capacity building for the promotion of voluntourism activities	Short/ Medium-term	Internship program development Turtle hatchery voluntourism projects (vetted and approved by scientific community)	Hikkaduwa, Unuwatuna Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	No	Magazines,promotional campaigns via scientific community i.e.. National Geographic Partnering with local and international NGO's and universities
Maritime heritage sites	Tourism products that integrate maritime heritage	Short-term	Development of tourism itineraries linking Galle Fort, maritime museums and other marine heritage sites of interest to diving tourism	Hikkaduwa, Unuwatuna Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic Partnering with local and international NGO's and universities
Yacht/ cruise tourism	Cruise terminals Custom events for special occasions Environmental protections	Long-term	Hard infrastructure Yacht/catamaran charter and event hosting targeted towards luxury tourists Going plastic free/using waste infrastructure	Galle Harbour	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

## Development Strategies

### Short-term

- Developing citizen science projects and voluntourism opportunities in collaboration with a nearby turtle hatchery and other conservation organizations (Empirical findings, Consultation with turtle hatchery).
- Promote shipwreck diving tourism and combine it with onshore activities such as visiting Mahamodara turtle hatchery, maritime museum, Galle Dutch fort, and places of worship to encourage longer stays for tourists in the area (Empirical findings, information obtained from Sri Lanka Sub Aqua Club<sup>40</sup>)

### Medium-term

- Leverage Galle's reputation for yacht tourism and chartering as a means of destination promotion on the world stage (Empirical findings).
- Collaborate with international marketing promotion agencies to promote yachting, build Sri Lanka's reputation, and draw in high net worth individuals. (MAC Sri Lanka)
- Increase the availability of rentable boats so that they can be rented out by accommodations. (Findings from the survey)
- Support their capacity to accommodate tourists' requests to organize events on yachts (Findings from the survey)
- Improve the quality of existing tourism products, such as whale-watching, using proper whale-watching boats equipped with safety equipment to mitigate health and safety risks to tourists (Empirical findings from on-site visit).

### Long-term

- Cruise tourism. It is recommended to construct a cruise terminal at Galle and Mirissa harbours to accommodate cruise ships and larger-sized yachts. This will not only raise the reputation of the area, but also support more luxury tourists coming to Galle and the surrounding area (Empirical findings from site visit, Greater Galle Development Plan 2019-2030<sup>41</sup>, Insights from Marine Tourism Steering Committee meeting)
- Marina development to revive the 2019 concept, which aimed to transform Galle harbour into a full fledged yachting marina. Revival plans should support activities related to whale watching, domestic boat ownership, chartering, sunset cruises, fishing and water sport expeditions, inter-marina travel, international yachting arrivals, public amenities (bars, restaurants, cafes...etc.) and marine support services (maintenance, repairs, after sales). (Meeting with Sail Lanka)

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<sup>40</sup> *Www.DiveSriLanka.com - Ship wrecks of Sri Lanka.* (n.d.). <https://divesrilanka.com/SPAllSLWrecks.html>

<sup>41</sup> *Greater Galle Development Plan 2019-2030.* (2019). UDA District office, Galle. [https://www.uda.gov.lk/attachments/devplan\\_detailed/Development%20Plans%202019-2030/Galle/English.pdf](https://www.uda.gov.lk/attachments/devplan_detailed/Development%20Plans%202019-2030/Galle/English.pdf)

## Deliverable 3: Spatial and Zonation Plans

The recommendations listed in the following section underscore the importance of protecting Trincomalee's marine species, preventing unsustainable behaviour, and enforcing regulations to protect sensitive coastal areas and sites such as Pigeon Island.

### Zoning Recommendations

#### *Short-term*

- Refrain from tourism development outside the tourism zone to prevent conflicts between residents, tourism businesses, and tourists. (Consultation with the UDA)
- Prevent activities that could lead to discharging wastewater/drainage, solid waste letting, or liquid chemical/fuel spills, including re-examining practices allowing cruise ships to discharge waste at the cruise terminal for a low-cost rate. (Empirical findings, Consultation with Cordelia Cruises at the Trincomalee Cruise Terminal)
- Enforce a ban on dynamite fishing and expand the capacity to find, prosecute, and punish those taking part in the practice, including accomplices, to demonstrate the seriousness of the practice and bring those to justice.

#### *Medium-term*

- Put a monitoring and evaluation process in place to track marine assets' health and any correlations between tourism development and changes to health/coverage patterns. (Consultation with Marine Tourism Steering Committee, S4IG, Navy, Dept. of Wildlife)

#### *Long-term*

- Evaluate the monitoring and evaluation process. Commission a report to analyse findings on the health of the marine environment and use them to inform policy-making or for scientific validation. (Empirical findings)

### Conservation Management Recommendations

#### *Short-term*

- Tourists communications at Pigeon Island covering information about the island, safety measures, conservation efforts and general tourist behaviour around marine species found on the island (i.e. sharks/coral reefs/ other marine life). (Empirical findings from site visit, Consultation with Ministry of the Environment, Dept. of Wildlife)
- Enforcement on the dynamite fishing ban including a higher fine and jail time for those convicted for taking part in and colluding with fishermen engaged with dynamite fishing. (Consultation with the Navy, Meeting with high level marine stakeholders in Trincomalee, Meeting with Marine Tourism Steering Committee)
- Strict regulations and control on the purchase of dynamite/explosives to make it more difficult for those taking part in dynamite fishing to obtain explosives. (Meeting with high level marine stakeholders in Trincomalee)
- Demarcation buoys in shared coastal and harbour areas to designate areas for both the tourism and fishing industries. (Consultation with the Navy)
- Resources and training for CCD/Dept of Wildlife/Coast Guard to combat dynamite fishing and other unsustainable activities, such as whale diving, occurring in and around Trincomalee. (Meeting with high level marine stakeholders in Trincomalee)
- Role of Navy in the enforcement of zoning to uphold demarcation regulations and infrastructure (buoys). (Consultation with the Navy)

#### *Medium-term*

- Management of paddy cultivation, industrial activities at Tambalagam Bay and the surrounding area to prevent the discharging water/drainage of solid waste and liquid chemicals, with the additional focus of developing contingency plans to cope with nearby fuel spills. (Trincomalee Port Zoning Report<sup>42</sup>)

#### *Long-term*

- Carrying capacity studies and Environmental Impact Assessment on cruise port expansion to assess the feasibility of increasing tourist arrivals. Based on this, estimates for the number of ships and arrivals that Trincomalee could welcome at any given time can be made to avoid causing harm to the environment. (Empirical findings, Tourism Demand and Supply Assessment in Sri Lanka<sup>43</sup>).

## **Deliverable 4: Key Infrastructure Recommendation**

Trincomalee is receiving increased interest from tourists looking for niche diving experiences and trips to religious pilgrimage sites. While the development of a cruise terminal has extended Trincomalee's capacity to welcome an increased number of tourists, particularly from Chennai (India), there are very few tourism activities for tourists to take part in both at the port and in the city area. Besides this, the harbour, and the passenger terminal lack facilities and amenities including an immigration processing area, bathrooms, shops and waste bins. Although, ambitious tourism development is on the horizon. Such plans foresee the addition of basic infrastructure such as drinking water and developing additional cultural and heritage tourism products.

The table featured in the upcoming section highlights the different types of infrastructure development and upgrades that are needed to bridge existing gaps, prevent unsustainable activities, increase tourist satisfaction and offer amenities to new subsets of tourists including cruise tourists

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<sup>42</sup> Democratic Socialist Republic of Sri Lanka: National Port Master Plan: The Trincomalee Port Development Plan – Volume 3 (Part 3). (2020). Asian Development Bank. [https://www.adb.org/sites/default/files/project-documents/50184/50184-001-tacr-en\\_14.pdf](https://www.adb.org/sites/default/files/project-documents/50184/50184-001-tacr-en_14.pdf)

<sup>43</sup> IPE Global & EML Consultants. (2019). Development Plan for 4 Targeted Market Segments: Tourism Demand and Supply Assessment in Sri Lanka and Preparation of Detailed Investment Proposals for Targeted Destinations and Market Segments. Australian Aid and World Bank.

N.	Destination	Project category	Type of infrastructure (Project)	Authority	Recommended Adjacent Locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches	Tourism infrastructure	Public toilets (tourist need)	UDA, Provincial Council, PS, SLTDA, CEA, Ceylon Fishery Harbours Corporation, CC&CRMD, NWS&DB	Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Drinking water (tourist need)			Short-term	Hard infrastructure
			Changing areas (tourist need)			Short-term	Hard infrastructure
		Waste infrastructure	Water bungalows (accommodation diversification)	UDA, Provincial Council SLTDA, Ministry of Tourism, Department of Forestry, CEA, Ceylon Fishery Harbours Corporation, CC&CRMD, Land Commissioner Generals Dept.	Trincomalee town beach, Coral Cove Beach, Marble Beach	Long-term	Investment
			Underwater museum (additional and unique attraction)			Medium-term	Hard infrastructure/ investment
			Waste bins (waste management)			Short-term	Hard infrastructure
		Medical infrastructure	Rescue facilities (rescue equipment/first aid kits for tourist health and safety)	Coast guard, dive centre, local tourism authority, SLTDA	Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
2	Islands (Powder Island, Crow Island, Pigeon Islands)	Regulatory infrastructure	Buoys (for demarcation purposes)	Navy, police, Ceylon Fishery Harbours Corporation, DEAR, SLPA	Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Certification (i.e. Blue Flag, for branding and promotion)			Medium-term	Regulatory
			Shipwreck diving infrastructure (to establish shipwreck diving as an anchor product)			Medium-term	Investment/ Regulation
		Regulatory infrastructure	Public toilets (tourist need)	UDA, Provincial Council, PS, SLTDA, CEA, Ceylon Fishery Harbours Corporation, DWLC, CC&CRMD	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Docking area (to facilitate marine vessels)			Short-term	Hard infrastructure
			Buoys (for demarcation)			Short-term	Hard infrastructure
			ESA signage (for tourist communication and sustainable behaviours)			Short-term	Hard infrastructure
			Petrol Tax Concession (to incentivize formalization)	SLTDA, Department of Wildlife, Ceylon Fishery Harbours Corporation, DWLC	Powder Island, Crow Island, Pigeon Islands	Short-term	Investment/Policy

3	Port/ natural harbour	Tourism infrastructure	Marina (to welcome more tourism vessels)	Port Authority, CCD, Navy, Ceylon Fishery Harbours Corporation, CEA	Trincomalee Harbour	Medium-term	Investment
			Water refill station (to reduce plastic waste)	DA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation, CEA	Trincomalee Harbour	Medium-term	Hard infrastructure
			Waste processing (management process to mitigate pollution)	UDA, Provincial Council, PS, SLTDA, Ceylon Fishery Harbours Corporation with the assistance of CEA, MEPA	Trincomalee Harbour	Medium-term	Investment
			Pier/floating jetty (to welcome more marine vessels)	Port Authority, SLTDA, Ceylon Fishery Harbours Corporation, CEA, CC&CRMD	Trincomalee Harbour , Trincomalee town beach, Coral Cove Beach, Marble Beach	Long-term	Investment
			Permanent anchoring area (to avoid continued damage to seabed and marine biodiversity)	Navy, Ceylon Fishery Harbours Corporation, CEA, CC&CRMD	Trincomalee Harbour , Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Eco-friendly boats (that run on green energy to reduce kerosene pollution)	Port Authority, SLTDA, CEA	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Medium-term	Investment
		Regulatory infrastructure	ESA signage (tourist communication)	Navy, police, Department of Wildlife, Ceylon Fishery Harbours Corporation	Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Buoys (for demarcation)	UDA, CCD, Navy, Provincial Council, SLTDA, Ceylon Fishery Harbours Corporation, DFAR, CFHC	Trincomalee town beach, Coral Cove Beach, Marble Beach	Short-term	Hard infrastructure
			Immigration processing centre (to facilitate more efficient processing)	Immigration Office, provincial council, SLTDA	Trincomalee Harbour	Short-term	Investment
			Yachting/ Sailing/ Boating regulations (to ensure that arrivals don't overburden carrying capacity, impact the marine environment...etc.)	SLTDA, Port Authority, Navy, Ministry of Immigration, Ministry of Tourism, CEA, Dept of Archeology, Ceylon Fishery Harbours Corporation	Trincomalee Harbour	Medium-term	Regulatory



## Infrastructure Recommendations

### *Short-term*

- Carrying capacity and activity limitation study to determine the feasibility of expanding the number of arrivals to Trincomalee. (Empirical findings)
- Basic facilities, including bathrooms, changing areas, drinking water, waste infrastructure, first aid kits and tourist communication/signage at Pigeon Island and in other popular beach areas. (Empirical findings from on site visits)
- Immigration processing centre at cruise port to facilitate timely and efficient immigration processing for cruise tourists arriving at the port. (Site visit and informal consultation with representative at cruise terminal)
- Environmentally Sensitive Area ESA signage to inform visitors of appropriate behaviour around ESAs and support compliance with measures and regulations in place to protect these areas. (On site consultation, Consultation with Ministry of the Environment, Dept of Wildlife)
- Rescue infrastructure and training and capacity building. CPR training for tourism stakeholders, first aid kits, rescue jet skis, oxygen masks and other technical support should be provided to contribute to tourist health and safety. (Meeting with high level marine stakeholders in Trincomalee)
- Permanent anchoring area to avoid damage to the seabed and surrounding coral reefs from repeated anchoring. (Empirical findings)
- Docking area on Pigeon island to avoid erosion from boats being pushed back and forth on the coastline. Installing a dock will also help regulate the number of boats arriving at Pigeon Island and keep visitation numbers in line with regulations. It is further suggested that spots be limited to registered tour operators who pay the mandatory visitation fees. Having such a method in place will not only support crowd control, but also help clamp down on unauthorized tourism boats. (Consultation with the UDA)
- Duty-free inclusion of Sri Lankan-made equipment and boats to support the local industry of suppliers and operators. Due to taxes imposed on importing boats, tourism operators, including Sail Lanka and the Chamber of Marine Industries lamented that the duties make it too costly to be lucrative. Therefore by having 50% exempted from VAT, scaling will be more feasible due to enhanced affordability (Consultations with Chamber of Marine Industries).

### *Medium-term*

- Hard infrastructural development for waste management processing (apart from the existing landfill), supported by other technological or community-led initiatives to close the plastic loop. (I.e. recycling infrastructure and partnerships with upcycling businesses, trash collection rewards for community-members that collect bottles and cans. (Empirical findings and Consultations with Coast Guard, SLTDA)
- Additional activities in proximity to the port to capture tourism spending and provide activities for day tourists to take part in while in Trincomalee. Stakeholders expressed that shopping areas were sought out by cruise tourists and should therefore be developed so that community-members can sell their locally-made products and souvenirs. (Consultation with the Port Authority)

### *Long-term*

- Cruise terminal expansion should be assessed based on findings from a carrying capacity and activity limitation study. This is recommended to be conducted prior to development plans being drawn up. (Empirical findings from site visit to cruise terminal)
- Pier/floating jetty to welcome more yachts and marine vessels to Trinco harbour in a way that is aligned with carrying capacity study findings to avoid overburdening the area. (Consultations with Port Authority and Sail Lanka)
- A central expressway to connect Colombo and Trincomalee (Colombo-Trincomalee Development Corridor). Plans are already underway to connect the two areas, which will establish steady tourism flows. (Consultation with the Divisional Secretary)

## **Deliverable 5: Trincomalee's Tourism Anchor Products**

Trincomalee is one of Sri Lanka's lesser known destinations, situated away from the main tourism circuit that runs through the southern half of the country. Located in the north east corner of Sri Lanka, Trincomalee's untouched nature continues to attract investment, particularly for private-sector led tourism infrastructure development and more recently, cruise liners, who are ushering tourists in from nearby key source markets such as India.

Trincomalee's tourism industry is dependent on a healthy and thriving reef ecosystem for its diving and snorkeling tourism products, assets which are imminently under threat by dynamite fishing. As an alternative product, underwater attractions including dives to underwater sites and niche shipwreck diving experiences are looking to diversify Trincomalee's dive offering.

Above water, there is also a growing market for catamaran and yacht charters. As a high-spending and sought after luxury offering, chartering has the greatest potential to grow the luxury tourism market rapidly.

The following activities have been identified as Trincomalee's potential marine tourism anchor products.

### **Diving and Snorkeling**

With one of the country's healthiest reef ecosystems and prime diving conditions, Trincomalee's diving industry is the area's biggest anchor product.

Efforts to support and promote the diving industry include:

- Small-group tour development and marketing the area as an off-the-beaten-path destination. (Consultation with dive centre Pasikudah)
- Seeking funding from the tourism board to support coral planting activities. (Consultation with Conservation officer)
- Showcasing the diving centre's environmental conservation efforts, such as beach cleanups, on social media. (Empirical findings)

### **Shipwreck Diving**

As many shipwrecks lie off the coast of Trincomalee, there is a vast potential to attract divers to the area for multi-day dive experiences.

This can be promoted by:

- Utilizing social media and assistance from tourist boards to promote the area's numerous shipwrecks and their historical significance. (Empirical findings)
- Educating divers on the historical significance of Sri Lanka, including its involvement in World War II. (Consultation with dive centre in Pasikudah)

### **Cruise and Yacht Tourism**

With chartering businesses like SailLanka successfully operating and the cruise port fully operational in Trincomalee, the potential for expanding the destination's boating reputation is vast.

Reputation building and scaling can be accomplished by:

- Attracting high-end tourists through S4IG, which offers coral viewing, camping experiences, and cave diving tours for high-end tourists. (Consultation with S4IG)
- Emphasizing the safety and security of the harbour during the monsoon season in communications to tourism operators. (Consultation with Port Authority)
- Advertising the construction of additional passenger terminals and harbours for super-yachts by the Port Authority in line with a carrying capacity study. (Consultation with Port Authority)

## Boating and Wildlife Tours

Trincomalee's marine wildlife, notably, its dolphin and whale populations provide a unique experience for tourists who are seeking out experiences where they can view wildlife in their natural habitat. While the potential to build a tourism strategy around such products is present, current wildlife activities are largely unsustainable with crowding, chasing and other negative behaviours visible to tourists.

In order to continue to offer such activities, the following will be needed:

- Fees that are collected from whale watching should generate funds dedicated to marine protection. This should be promoted on social media and communicated to tourism operators to improve transparency over conservation fees. (Empirical findings, Consultation with Dept. of Wildlife.)
- Enforcement of regulations, creation of and communications about a code of conduct. The Navy's role in conservation should also be used in tourist communications to add legitimacy to the code of conduct. (Empirical findings)

## Surfing

Surfing is one of the lesser known tourism activities in Trincomalee, offering surfers the chance to surf in pristine areas that are far off the beaten track.

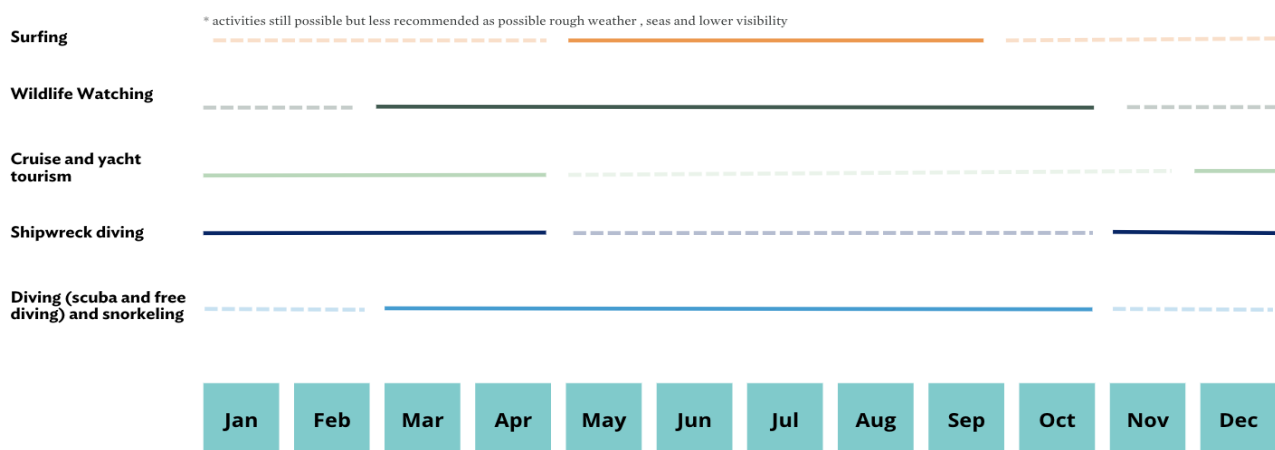
To grow Trincomalee's reputation as a surfing destination, promotional efforts should include:

- Promoting the area as a surf destination (Empirical findings)
- Encouraging surf operators/instructors to provide surfing lessons to local children to build an affinity for the ocean and organize beach cleanups and other conservation initiatives for local and tourists aimed at facilitating cultural exchange. This will also help establish the area's reputation for sustainability. (Consultation with Diving Guru)

## Trincomalee's Seasonality

Trincomalee is able to mitigate seasonality thanks to the destination's year-round boating and diving/snorkeling conditions, summer surf season and its prospects for wildlife tourism sightseeing. With a mild monsoon season, Trincomalee offers tourists the opportunity to take part in leisure activities and water sports, providing a diversified offering to visitors. With the opening of the cruise terminal, the influx of year-round tourists presents the opportunity to further expand Trincomalee's offerings to include shopping and other leisure activities.

### Seasonality of Trincomalee's tourism products



### Alternative activities to combat seasonality

- Gastronomy tours (showcasing local/regional cuisine)
- Festival and sporting events
- Visit to temples and religious sites (a main activity for cruise passengers)
- Kumana National Park
- Boat racing events (for destination promotion in the international boating sphere)
- Sand castle competitions (as a family-friendly activity)

## Summary of Trincomalee's infrastructure needs per tourism activity

Type of activity	Infrastructure gaps and needs	Time line (Prioritization)	Strategy	Recommended Location	Present y Existing	Promotional Recommendations
Diving/ free diving/ Snorkeling/ Shipwreck diving	Rescue kits Eco-friendly boats (moving away from kerosene) Changing areas Bathroom facilities Additional dive sites (shipwrecks and trains) Shipwreck diving tour itineraries	Short-term	Enforcement of dynamite fishing ban (stricter punishment) Waste processing (to avoid pollution and higher fees for dumping waste at the harbour) Tourist communication on Pigeon Island (about proper behaviour around marine species)	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Diving/S norkellin g-Yes Shipwre ck diving- minimal	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Boat tours/ Wildlife sightseeing	Whale watching boats (two level) Marina infrastructure for yachts and boats Floating jetty	Short/ Medium-term	Navy support for whale watching management/providing tours to tourists Capacity for additional catamaran and yacht tours	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Cruise tourism	Half day activities (incl. shopping and other experiences located by where cruise ships are docked) Immigration processing centre	Long-term	Carrying capacity study and environmental impact assessment on cruise terminal expansion Hard infrastructure	Trincomalee Harbour	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Water bungalows	Approval of projects/ investment	Long-term	Tourism product development and promotion strategy Hard infrastructure	TBD.	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Yacht/cruise tourism	Cruise terminals Tourism product diversification Environmental protections	Long-term	Hard infrastructure Yacht/catamaran charter and event hosting targeted towards luxury tourists Going plastic free/ using waste infrastructure	Trincomalee Harbour, Trincomalee Town Beach	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

## Development Strategies

### *Short-term*

- Equip tourism operators with proper diving boats to raise tourism diving products to a higher international standard and support tourist health and safety. (Consultation with shipwreck diving stakeholders)
- Quality control measures are needed to ensure the safety, maintenance of and overall competitiveness of the tourism product. (Consultation with Coast Guard)
- Incentivized sectoral formalization process. There are still too many unregistered tourism businesses circumventing regulations in sensitive areas like Pigeon Island. Hence, formalization is needed to prevent such areas from being overburdened. (Meeting with high level marine stakeholders in Trincomalee)
- Promotion of Trincomalee as a year-round destination. Trincomalee has the ability to attract tourists year-round thanks to its climate and optimal diving conditions. Therefore, it should be promoted as such to draw in steady streams of visitors to mitigate seasonality. (Consultation with diver centre in Pasikudah)
- Promotion of Sober Island, a nearby island that is run by the Navy, able to attract high-value and luxury tourists. (Comments from with Chamber of Marine Industries in meeting with Marine Tourism Steering Committee)

### *Medium-term*

- Suggest sinking different types of vessels or trains to differentiate Trincomalee. These additional sites could be added to diving experiences that are centred on shipwreck diving to diversify the offering. (Consultation with Marine Tourism Steering Committee)

### *Long-term*

- Develop a marina through public-private partnerships to encourage more yachts and boats to come to Trincomalee. (Consultation with Sri Lanka Port Authority)
- Add upscale water bungalow accommodations to differentiate Trincomalee's tourism offering and attract luxury-minded tourists seeking out an authentic accommodation. (Meeting with high level marine stakeholders in Trincomalee)



### **Deliverable 3: Spatial and Zonation Plans**

Jaffna's natural assets, coastal landscapes and high potential for tourism development are essential to preserve moving forward as these factors represent the area's biggest marine tourism competitiveness. The following recommendations underline the area's need for planning and preparation for tourism development, particularly addressing Jaffna's coastal vulnerability, the lack of an existing tourism zone, and conflict between the fishery sector and aquaculture and tourism industries.

#### **Zoning Recommendations**

##### *Short-term*

- Demarcation buoys at sea cucumber farms. Sea cucumber farms have reportedly pushed fishermen away from their normal areas of operation, hence causing conflict. To prevent this from continuing, demarcations can be used to separate areas so that fishermen have a dedicated area for their boats. (Deliverable 1, Scope 2)

##### *Medium-term*

- Development of a tourism zone. The UDA plans on re-branding tourism to Jaffna with the intention of demarcating areas for tourism development purposes; a concept that was previously recommended by NARA in order to prevent development from happening outside of the tourism zone, a practice that goes against the interest of existing industries. Plans should consider Jaffna's main sectors, including tourism, fisheries, aquaculture and agriculture with zonation specifying the primary areas for activities to take place. (Deliverable 3, Scope 2, Meeting with High level stakeholders and Government officials in Jaffna)
- Carrying capacity and activity limitation study to determine the feasibility of expanding the number of arrivals to Jaffna. In order to further develop the eco-tourism offering in Jaffna, precautionary measures such as environmental impact assessments and the above mentioned studies are recommended to prevent adverse impacts on environmentally sensitive areas and natural assets. (Empirical findings, Deliverable 3, Scope 2)
- Assessment on the vulnerability of Jaffna's low lying areas. As Jaffna is particularly prone to the effects of sea level rise and other climate-related impacts, assessments are needed to determine the feasibility of tourism development in coastal and low-lying areas to avoid future economic impacts on tourism businesses and to reassure investors that their tourism investments are secure. (Deliverable 3, Scope 2)
- Eco-tourism development, using Jaffna's marine tourism and wildlife anchor products as a base for development. Eco-tourism development should include creating a catalogue of tourism products, adding infrastructure and eco-tourism accommodations in suggested areas within the tourism corridor pockets and tourism zones. Development should also be extended to Delft Island and the islands of Eluvaitivu, Analaitivu and Nainativu. (Meeting with High level stakeholders and Government officials in Jaffna, Meetings on Delft Island, Empirical findings)

##### *Long-term*

- Disaster risk strategy for Jaffna focusing on climate change mitigation and adaptation and coping with the challenges from sea level rise, erosion and other factors that put tourism businesses and other coastal infrastructural assets at risk. Suggestions should include mitigating the impacts of seasonal monsoons, preventing physical changes to corals and other natural coastal barriers, proposing breakwaters, employing sandbags, and potentially moving infrastructure development inland where possible, with semi-permanent structures as an alternative. (Deliverable 3, Scope 2, Meeting with High level stakeholders and Government officials in Jaffna)

## Conservation Management Recommendations

### Short-term

- Protections for marine biodiversity. While the reefs adjacent to Jaffna appear to be healthy, the reef ecosystems in the outer islands are degraded, with vast areas showing losses in the quality and health of reef species. Therefore, strategies for planning, management and communication are needed to enhance conservation measures around marine protected areas to conserve the health of the reef. Restoration efforts are also needed for the reefs located offshore of Jaffna's outer islands, which are considered to be in a degraded state, showing high percentages of dead coral cover as a result of sewage discharge, poor fishing practices, resource exploitation, dredging, algae cover, and high sea surface temperatures. (Deliverable 3, Scope 2)
- Conservation measures for lagoons and bird sanctuaries. The Physical Plan for the Northern Province outlines that lagoons and bird sanctuaries should be given special protected status or integrated conservation efforts. Conservation efforts are further suggested as a means of reducing community-wide conflict as a result of development. (Deliverable 3, Scope 2, Integrated Strategic Environmental Assessment of the Northern Province of Sri Lanka (ISEA - North)<sup>44</sup>

### Medium-term

- Awareness raising/training for fishing communities. Fishing activity is one of the biggest causes of harm to marine life, largely due to the lack of awareness around the unsustainable behaviours occurring around the reefs unbeknownst to those relying on these habitats for income. This is suggested to be targeted through scaled awareness-raising workshops (based on existing initiatives), held with the local fishing community, school-aged children, and other community members to highlight the value of marine ecosystems and their ability to protect the area from sea-level rise, high-tides and tsunamis. Tangible examples should be given to show communities how these effects could increasingly impact their everyday lives. (Deliverable 3, Scope 2, Meeting with High level stakeholders and Government officials in Jaffna, Empirical findings)

### Long-term

- Community-participation through a participatory approach. Apart from awareness raising, community members should also have a voice and be represented in decision-making to ensure the acceptance of the changes that increased tourism development may bring. Youths should also be engaged in conservation through targeted programs that share knowledge about Sri Lanka's marine biodiversity to instill a connection to the marine environment. Existing initiatives, such as the "Empowering Youth of Conservation Program" should likewise be scaled to promote a wider affinity for marine biodiversity. (Deliverable 2, Scope 2)

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<sup>44</sup> Integrated Strategic Environmental Assessment of the Northern Province of Sri Lanka. (2014). Central Environment Authority and Disaster Management Centre, Supported by United Nations Development Programme and United Nations Environment Programme. [https://iucn.org/sites/default/files/content/documents/2017/isea\\_north\\_final\\_report.pdf](https://iucn.org/sites/default/files/content/documents/2017/isea_north_final_report.pdf)

## **Deliverable 4: Key Infrastructure Recommendation**

Jaffna is well positioned to become a multi-faceted destination that attracts nature aficionados and luxury tourists alike. Making use of existing infrastructure, (i.e. sea cucumber water towers, lighthouses), the plethora of adjacent islands, proximity to India, and prized natural assets, Jaffna has the potential to become a mainstream tourist destination as the gateway to the Northern Province.

Apart from introducing basic infrastructure, the following recommendations aim to enhance existing amenities and services, connectivity, and specifically tourist transportation to/from Jaffna. Connectivity extends to marine tourism infrastructure, requiring the addition of mooring capabilities, breakwaters and marinas to increase accessibility by sea, a major pre-condition for scaling arrivals from key source market, India.

Other factors such as the vulnerability around Jaffna’s low lying areas, the need for additional environment protections, and addressing capacity gaps have also been included in the infrastructural recommendations. The following chart provides a comprehensive outline of the main infrastructural recommendations needed to meet tourist demand and improve the current offering.

The table featured in the upcoming section highlights the different types of infrastructure development and upgrades that are needed to bridge existing gaps, prevent unsustainable activities, increase tourist satisfaction and offer amenities to new subsets of tourists.

N.	Destination	Project category	Type of infrastructure (Project)	Authority	Recommended adjacent locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches & Harbour	Tourism infrastructure	Basic infrastructure (Public toilets, changing rooms, showers, and sunbeds)	Urban Development Authority (UDA), Provincial Council, Private Sector (PS), Sri Lanka Tourism Development Authority (SLTDA), Fisheries and Harbour Cooperation, CEA	KKS, Casuarina Beach, Jaffna Lagoon, Charty Beach, Karainagar Beach, Guru Nagar Jetty	Short-term	Hard infrastructure
			Drinking water	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	KKS, Casuarina Beach, Jaffna Lagoon, Charty Beach, Karainagar Beach, Guru Nagar Jetty	Short-term	Hard infrastructure/Investment
			Decompression chamber	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Town/tbd.	Long-term	Hard infrastructure
			Upgrades and additional marinas, jetties and tourism amenities	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	KKS, Kurikadduwan Jetty, Guru Nagar Jetty	Long-term	Hard infrastructure/investment
			Boat infrastructure (for transportation and tours to surrounding islands)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	KKS, Delft Island (and the surrounding islands of Eluvaitivu, Analaitivu, Nainativu), Kurikadduwan Jetty, Guru Nagar Jetty	Long-term	Hard infrastructure/investment
		Waste infrastructure	Immigration processing for arrivals (Increased capacity)	Department of Immigration, SLTDA, Provincial Council	KKS	Short-term	Regulatory
			Waste bins	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Harbours/jetties/ tourist beaches	Short-term	Hard infrastructure
			Waste management system	UDA, Provincial Council, PS, SLTDA, CEA	Harbours/jetties/ tourist beaches/Jaffna (whole destination)	Short-term	Regulatory
		Regulatory infrastructure	Erosion support	CCD, National Aquatic Resources Resource Research and Development Agency (NARA), Marine Environmental Protection Authority (MEPA), CEA	Coastal tourism businesses	Long-term	Hard infrastructure/Regulatory
			Tourist signage (for law enforcement on beach regulations and codes of conduct)	SLTDA, Min. of Tourism, CCD, National Aquatic Resources Resource Research and Development Agency (NARA), Marine Environmental Protection Authority (MEPA), CEA	Casuarina Beach (and other tourist beaches), Jaffna Lagoon, Wildlife areas, KKS, Delft Island (and the surrounding islands of Eluvaitivu, Analaitivu, Nainativu), Kurikadduwan Jetty, Guru Nagar Jetty	Short-term	Regulatory/hard infrastructure

2	Town centre and outskirts	Transportation infrastructure	Public transportation from the airport and ferry terminals	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation	Town	Town	Long-term	Investment/hard infrastructure
		Transportation infrastructure (to/from Jaffna)	High speed trains	UDA, Provincial Council, PS, SLTDA	Town/Connecting Jaffna to destinations in the NP	Town/Connecting Jaffna to destinations in the NP	Long-term	Investment/hard infrastructure
		Tourism infrastructure	Kiosks at Palai Airport	UDA, Provincial Council, SLTDA	Town/ Palai Airport	Town/ Palai Airport	Long-term	Investment/hard infrastructure
			Registration with SLTDA	SLTDA	Town	Town	Medium-term	Regulatory
			Tourist promotion	SLTDA	Town	Town	Long-term (or Medium-term depending on speed of development)	Investment
		Capacity building	Hotel and resorts (additional capacity)	UDA, Provincial Council, Private Sector, SLTDA	Town	Town	Long-term	Investment
			Community and tourism multi-purpose infrastructure	UDA, Provincial Council, Private Sector, SLTDA	Town	Town	Medium-term	Investment
3	Delft Island	Education	Vocational training/programs on boat building and hospitality	Sail Lanka (Private sector), Chamber of Marine Industries, Ministry of Tourism, Ministry of Education, SLTDA	Town	Town	Medium-term	Investment
		Tourism infrastructure	Awareness campaigns on waste management	Ministry of Tourism, Ministry of Education, SLTDA, CEA	Town	Town	Short-term	Investment
			Jetty for docking (or expansion of current jetty)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Island	Medium-term	Hard infrastructure/Investment
			Boat infrastructure (High speed tourism boats) for connections from Jaffna	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Island	Medium-term	Hard infrastructure/Investment
			Drinking water	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Island	Short-term	Hard infrastructure/Investment
			Tourism promotion	SLTDA, Tourism promotion board, Ministry of Tourism	Island	Island	Long-term	Investment
			Accommodation	UDA, Provincial Council, Private Sector, SLTDA	Island	Island	Long-term	Investment
		Communication	Tourist signage (Renovation and updates)	Ministry of Tourism, Ministry of Education, SLTDA, CEA, NARA, MEPA	Island	Island	Short-term	Hard Infrastructure
		Capacity building	Tourism workforce training and capacity building	Ministry of Tourism, Ministry of Education, SLTDA	Island	Island	Medium-term	Investment
		Waste infrastructure	Waste bins	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Island	Short-term	Hard Infrastructure

4	Eluvaitivu, Analaitivu, Nainativu	Tourism infrastructure	Jetty for docking (or expansion of current jetty)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Medium-term	Hard infrastructure/ Investment
			Boat infrastructure (High speed tourism boats) for connections from Jaffna	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Medium-term	Hard infrastructure/ Investment
			Drinking water	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Short-term	Hard infrastructure/ Investment
			Tourism promotion	SLTDA, Tourism promotion board, Ministry of Tourism	Island	Long-term	Investment
			Accommodation	UDA, Provincial Council, Private Sector, SLTDA	Island	Long-term	Investment
		Communication	Tourist signage (Renovation and updates on environmental protections)	SLTDA, Min. of Tourism, CCD, National Aquatic Resources Research and Development Agency (NARA), Marine Environmental Protection Authority (MEPA), CEA	Island	Short-term	Hard Infrastructure
		Capacity building	Tourism workforce training and capacity building	Ministry of Tourism, Ministry of Education, SLTDA	Island	Medium-term	Investment
		Waste infrastructure	Waste bins	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Island	Short-term	Hard Infrastructure



## Infrastructure Recommendations

### *Short-term*

- Address immediate infrastructural needs including basic infrastructure particularly public rest-rooms, potable water, changing areas, sunbeds, and other leisure areas for tourists with priority given to the rest-rooms and drinking water. (Empirical findings, Deliverable 1, Scope 2, Meeting on Delft Island)
- Introduction of waste bins in areas that are frequented by tourists to keep beaches free of pollution. In line with this, hard infrastructure (trash and recycling bins) should be supported by an overall enhanced approach to waste management planning for harbours/jetties. (Meeting with High level stakeholders and Government officials in Jaffna, Deliverable 3, Scope 2)
- Education/awareness campaigns on waste management to support waste collection and management efforts scaling the types of programs disseminated by MEPA. (Founder and President of Northern Province Tourism Association and tour company owner and Meeting with High level stakeholders and Government officials in Jaffna)
- Tourist signage (for law enforcement and protections) to prevent tourists from accidentally breaking the law by consuming alcohol or smoking on public beaches. (Founder and President of Northern Province Tourism Association and tour company owner, Meeting on Delft Island)
- Awareness campaigns on the benefits of tourism (aimed at community members) to be disseminated in schools and through multimedia with a wider aim of improving the perception of working in the tourism industry and combating the current perceptions around the tourism industry as a whole. (Meeting with High level stakeholders and Government officials in Jaffna)
- Immigration processing for arrivals to KKS to enable a quicker and more efficient processing of international passengers at the terminal. (Meeting with KKS)

### *Medium-term*

- Training and capacity building by scaling the efforts by Sail Lanka Yachting Group, Chamber of Marine Industries and other organizations to build capacity for boat building, sailing and hospitality training. (Meeting with Sail Lanka, Deliverable 1, Scope 2, Deliverable 3, Scope 2)
- Community and tourism multi-purpose infrastructure including the additions of multi-purpose infrastructure including shopping areas, parking lots, souvenir shops, Indian food markets, parks, playgrounds, and meeting halls to attract tourists to the area. (Physical Plan for the Northern Province, Deliverable 1, Scope 2, Deliverable 3, Scope 2)
- SLTDA Registration for the remaining 60% of businesses that are “unregistered” for the purpose of enhancing the safety and quality of tourism products in Jaffna. (Empirical findings, Meeting with High level stakeholders and Government officials in Jaffna)

### *Long-term*

- Marine tourism infrastructure (Marina, jetties and tourism amenities) to expand the capacity to welcome additional tourists and marine vessels including yachts: without which leaves a gap and limits the area’s scalability prospects for marine tourism. Development was additionally recommended to be undertaken to transform Guru Nagar Jetty into a quality tourist passenger terminal with all basic facilities present on site with the goal of attracting the private sector to invest in the area and in the immediate surrounding location. (Meeting with High level stakeholders and Government officials in Jaffna, Founder and President of Northern Province Tourism Association and tour company owner, Meeting with KKS, Meeting on Delft Island, Feedback from Jaffna Sri Lanka, Deliverable 3, Scope 2)
- Boat infrastructure including the addition of 300+ passenger capacity boats and high quality speed boats to transport passengers between Jaffna and the surrounding islands. (Meeting with High level stakeholders and Government officials in Jaffna, Meeting with Sail Lanka, Meeting on Delft Island)
- Hotel and resort capacity to diversify the current offering and increase the number of accommodations available to tourists during the festival season, where capacity is often stretched thin, leaving tourists without booking options. (Meeting with High level stakeholders and

Government officials in Jaffna)

- Restaurants and additional food and beverage establishments including a high quality seafood restaurant, floating restaurants and bar facilities on a waterfront jetty. (Feedback from Jaffna Sri Lanka)
- Tourism promotion to exponentially increase arrivals to Jaffna with a focus on Delft Island in the hopes of re-attracting high value tourists. (Meeting with High level stakeholders and Government officials in Jaffna, Meeting at Palai, Meeting on Delft Island)
- Kiosks at Palai Airport, adding travel agent booths/kiosks that enable tourists to get information on Jaffna's tourism offering, book activities and experiences before leaving the airport. (Empirical findings and Meeting at Palai)
- Public transport for accessibility, specifically from the airport and ferry terminals to the town and other surrounding areas including Mannar, Trincomalee and other lesser visited areas in the region. (Founder and President of Northern Province Tourism Association and tour company owner, Deliverable 3, New Scope)
- Erosion support by re-evaluating regulations and current actions to determine which additional measures are needed to strengthen coastal defences, combat erosion, and implement nature-based solutions such as mangrove planting projects. (Empirical findings, Deliverable 3, Scope 2)
- Decompression chamber to mitigate the risk associated with not having a decompression chamber nearby for scuba diving accidents. (Empirical findings)

## **Deliverable 5: Jaffna's Tourism Anchor Products**

Jaffna's most competitive existing tourism anchor products are wildlife watching and visits to historical, cultural and religious sites. Current tourism activities make use of Jaffna's natural assets, including a wide variety of bird species, its historical significance to the civil war and its ties to India. While existing assets provide a lucrative number of tourism sites and attractions, the area's potential for marine tourism and water-based activities remains largely untapped. Activities such as diving/snorkeling, boating/yachting/cruising, leisure activities, and experiences related to eco-tourism/voluntourism/aquaculture present a vast opportunity to diversify the area's tourism offering and introduce a competitive landscape for marine tourism.

The following section provides an overview of the activities that were determined as having the biggest potential to grow Jaffna's tourism industry; summarizing the findings presented in Deliverable 5.

### **Wildlife sightseeing**

Following the strategy set forth by the SLTDA in the Strategic Plan for Sri Lankan Tourism 2022-2025, Jaffna Lagoon, Chundikulam National Park and Casuarina Beach are envisioned as wildlife sightseeing destinations for their prized migratory areas, where tourists can see a wide array of marine and terrestrial wildlife in their natural habitat. These areas are home to rare bird species and numerous aquatic birds including the flamingo, ducks, gulls, terns, and other shorebirds, who are attracted to the area's mangrove, lagoons and seasonal marshes.

Efforts to support and promote the industry include:

- Development of eco-tourism activities, eco-tourism bird watching tours can be used as a means to preserve the lagoon while generating income for locals. The introduction of eco-tourism could help protect the lagoon and its bird-life, and provide an alternative potential development that does not threaten the integrity of the area's natural lagoon habitat
- Facilitate bookings on demand for a safari guide
- Tourism signage about bird species
- Preservation of areas located directly in migratory routes

### **Visits to historical/cultural/religious/civil war sites**

Jaffna has a rich maritime heritage reflected in its tourist attractions. Apart from its many historical and religious pilgrimage sites, Jaffna's port museum and Point Pedro, which functioned as a trading post during pre-colonial and colonial times, provide an allure for tourists interested in historical Jaffna.

Efforts to support and promote the industry include:

- Promotional campaigns promoting Jaffna's maritime heritage
- Training of tour guides and development maritime heritage tours
- Developing and promoting new museums and lesser known sites

### Leisure activities (beach and recreational areas)

Jaffna's beaches, specifically Casuarina Beach, Jaffna Lagoon, Charty Beach, Karainagar Beach, and in the adjacent sand dunes and mangroves, present the opportunity for tourists to take part in leisure activities such as sun bathing, swimming, snorkeling and beach sports.

Efforts to support and promote the industry include:

- Introductions of high quality sunbeds
- Basic infrastructure
- Drinking water
- Addition of semi-permanent structures as spaces for vendors (Food and beverage, and equipment rentals)
- Effectuating a study to determine the marine tourism activities appropriate for specific beaches based on information related to tides, sand and water quality)

### Diving/snorkeling

Home to a wide variety of marine biodiversity, Jaffna's coastal marine and lagoon ecosystems are a prime location for diving and snorkeling activities to take place. The shallow waters offshore Casuarina beach, make it an ideal location for beginners looking to become acclimated to diving techniques or are seeking to take part in leisurely snorkeling exploration.

Efforts to support and promote the industry include:

- Decompression chamber
- Cabins and dressing rooms (and other basic infrastructure)
- Dive boat and equipment rental agencies
- Shipwreck diving tourism products
- Reef conservation for reefs located offshore of Jaffna's surrounding islands
- A streamlined process for obtaining permissions (for diving/snorkeling in sensitive areas)

### Boating/yachting/cruising

Jaffna's main cruise terminal, Kankesanthurai Port (KKS), serves as the gateway to the Northern Province, welcoming international passenger vessels from various south India ports. Only reachable by boat, trips and tours to Jaffna's offshore islands, Delft Island, Eluvaitivu, Analaitivu, Nainativu, present the opportunity to promote the area's reputation for boating and leisure yachting. Therefore, once key infrastructure has been established to accommodate a variety of marine vessels, then the charter industry and other transport and tourism services such as tours, will be able to grow.

Efforts to support and promote the industry include:

- Addition of marinas, jetties for docking purposes
- Creation of a passenger terminal to bring in additional yachting/cruise arrivals
- Expansion project at KKS (increasing capacity for international arrivals)
- Private boat registration with the Navy
- Development of offshore islands (and marine infrastructure, docks, jetties..etc... for marine vessels)
- Tours and charter bookings (using high quality and high speed boats)
- Additional multi-destination boating options leaving from Jaffna (to offshore island and other destinations along the Northern Province)
- Multilingual tour guides (English, French, German, Japanese, Spanish, Chinese, Italian, Russian, and Arabic)

## Eco-tourism/voluntourism/aquaculture activities

Furthering the aspirations of turning Jaffna into an eco-tourism destination, the area's various hiking and biking trails on Nagadeepa Island and Casuarina Beach present the opportunity to add to the area's appeal to nature and environmentally-friendly tourists. Besides the area's unique wildlife sightseeing offerings, the area's natural resources including its palmyra trees, can also attract visitors looking to take part in handicraft-making and the purchase of locally-made souvenirs. The fishery and agricultural sectors also offer a plethora of opportunities for tourists to take part in hand-on experiences. Jaffna's proximity to the sea coupled with its reliance on aquaculture present the chance for "voluntourists" to support activities such as seaweed, sea bass and sea cucumber and oyster/mussel farming.

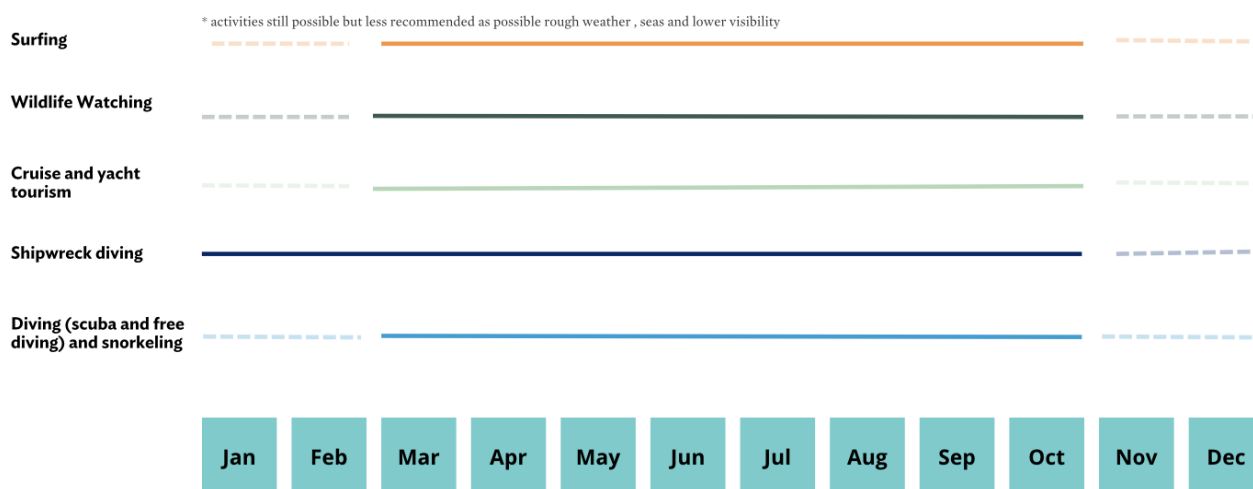
Efforts to support and promote the industry include:

- Establish research and information centres on Delft Island
- Support small tourism businesses making palmyra souvenirs and facilitate the development of handicraft making workshops
- Assess current bike and hiking trails to determine if improvements are needed for signage and pathway entries
- Promote Jaffna as an eco-tourism destination
- Facilitate cross-cultural voluntourism activities between tourists and fishermen (to alleviate conflict)
- Develop aquaculture-based industries and integrated tourist activities (i.e. sea cucumber farming)
- Streamline permitting process for sea cucumber farms/ demarcating areas for fishing activities

## Jaffna's Seasonality

Similar to the patterns experienced typically in the Northern Province, Jaffna experiences an alternating monsoon season, with weather conditions between April and September/October marked as the "high season". Rainy season runs from November through January, presenting difficult or subpar conditions for water-based activities during these months. However, Jaffna's alternative tourism attractions, notably, its historical, cultural and religious sites and wildlife corridors, continue to attract tourists year-round.

## Seasonality of Jaffna's tourism products



## Alternative activities to combat seasonality

- Historical, cultural and "dark tourism"
- Religious pilgrimage
- Agri-tourism "voluntourism" (Grape farming...etc.)
- Niche activities like "helicopter tours"
- Leisure activities (visits to nature parks...etc.)
- Gastronomy tourism

## Summary of Jaffna's infrastructure needs per tourism activity

Type of activity	Infrastructure gaps and needs	Time line	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife watching	Bird watching tours (ready-to-book) Tour guides (with specialized expertise) Additional protections for mangrove forests, lagoons and seasonal marshes Signage to prevent harm to coastal assets	Short-term	Preserving the unique biodiversity of the wetlands and important bird migratory areas Promotion of bird species found in Jaffna (flamingos, ducks, gulls, terns, and other shorebirds) Developing eco-tourism bird watching tours as a means of preserving the lagoon while generating income for locals	Jaffna Lagoon, Chundikulam National Park	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Visits to historical, cultural or religious sites	Signage for historical sites Tour guides (to enhance storytelling around Jaffna's historical significance) Renovation projects (to ensure structural integrity)	Short/ Medium-term	Using Jaffna Port Museum (for maritime heritage promotion) Tour development for those interested in Jaffna's culture and significance in the civil war Expanding accommodation capacity to meet the demand and high volumes of tourists who come to visit historical and cultural sites and visits during the festival season	Jaffna (town)	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Diving/snorkeling	Basic infrastructure Waste bins/waste processing Drinking water Decompression chamber Permissions for marine activities (streamlined process)	Short-term	Additional dive tourism operators and dive boat rental agencies Streamlined permission process for diving Conservation for reefs (enforcement of regulations against dynamite fishing,	Casaarina Beach, Jaffna Lagoon	No/ Maybe	Magazines, promotional campaigns via scientific community i.e.. National Geographic, Kiosks at Palai airport (providing tourist information)
Boating/yachting/cruising	Upgrades and additional marinas, jetties and tourism amenities in Jaffna Boat infrastructure (for transportation and tours to surrounding islands) including high speed boats that meet international standards Increased capacity for international arrivals (at immigration processing area) Jetty for docking (or expansion of current jetty) on Delft Island	Medium-term/ Long-term	Expansion of Sail Lanka in Jaffna with chartering offerings to surrounding islands Promotion of Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu Re-visit permissions for private boats Tourism workforce training and capacity building (for hospitality training and boat building) Enabling island hopping	KKS, Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic, Kiosks at Palai airport (providing tourist information)
Leisure activities (beach and recreational areas)	Basic infrastructure (Public toilets, changing rooms, showers, and sunbeds) Drinking water Waste bins	Short-term	Kiosks at Palai airport (providing tourist information) Addition of semi-permanent structures (floating structures)	Casaarina Beach, Jaffna Lagoon, Charty Beach, Karainagar Beach	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Eco-tourism, Vol-untourism & Aqua-culture Activities	Tourist signage (for law enforcement on beach regulations and codes of conduct) Development of activities Training and capacity building for instructors, guides...etc... Demarcations to avoid conflict with fishery industry at sea cucumber farms	Medium-term	Developing Delft Island into eco-tourism destination (and activities, beach-side barbecues, fishing, boat tours) Establish a research centre and information centre at Delft Island Promotion of hiking and bicycling trails Development of Palmyra handicraft activities Create voluntourism activities at sea cucumber farms and to support seaweed harvesting	Jaffna (town), Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)



## Development Strategies

### *Short-term*

- Incentivized sectoral formalization process. There is a need to have additional accommodation and tourism establishments in Jaffna to regulate the sector, have a more accurate understanding of the quantity of tourism service providers, prevent unsustainable activities, and provide support and capacity building to such businesses. Star-level accommodations, The Thinnai (a 3-star hotel), NorthGate Jaffna (a 3-star hotel), Jetwing Jaffna (a 2-star hotel), and Tilko Jaffna City Hotels (an A-grade guest house) can be used as best practice examples of the benefits of registration. (Meeting with SLTDA, Deliverable 2, Scope 2, Empirical findings)
- Navy reassurance campaign to communicate that tourism is not a security threat (Meeting with High level stakeholders and Government officials in Jaffna)
- Facilitate private boat registration process with the Navy. Private boats traveling between the islands around Jaffna are currently restricted, limiting the area's potential for boating and yachting in and around Jaffna. (Meeting with High level stakeholders and Government officials in Jaffna)
- Investment readiness strategy. Underlining the importance of creating an environment conducive to investment, which can lead to market expansion, knowledge dissemination, and support for new businesses. Re-assurance strategies and methods need to play a leading role to reaffirm that there will be a return on investment. (Deliverable 3, Scope 2)
- Integrate aquaculture industry into tourism products and services. To develop voluntourism and eco-tourism activities that also support fishermen and local economic activities; also increasing positive perceptions around tourism. (Empirical findings)
- Attract additional international arrivals. Boats currently come from Singapore and are rented out by private groups (only started a month ago, as of November 2023). Efforts such as these should be expanded to bring in additional international tourists. (Meeting on Delft Island)

### *Medium-term*

- Identify Blue Flag beaches. NARA has yet to identify any potential “Blue Flag” beaches, but this is a future goal. (Meeting with High level stakeholders and Government officials in Jaffna)
- Create an inter-departmental committee for community relations to communicate tourism development plans and gather community feedback. Awareness on the types of government support should be included in discussion to build trust. (Meeting with High level stakeholders and Government officials in Jaffna)
- Tourism product development. Stakeholders suggested that Jaffna needs to develop improved and more competitive tourist attractions to encourage tourists to stay, including integrated offerings such as group tours, sport fishing and catering. Founder and President of Northern Province Tourism Association and tour company owner)

### *Long-term*

- Promotional efforts. The lack of visitor awareness on Jaffna's tourism offering has led to low occupancy rates for guest houses and other tourism establishments. Therefore, an overall increase in the amount and diversity of visitors (regional, domestic, and international) coming to Jaffna is needed to grow the area's reputation and validate the need for additional investment and introduction of new tourism amenities. (Empirical findings, Deliverable 3, Scope 2)
- Develop the surrounding islands by establishing tourism accommodations, multi-day tours, activities, and eco-tourism experiences in addition to transport options. (Empirical findings, Meeting on Delft Island)



### **Deliverable 3: Spatial and Zonation Plans**

The upcoming recommendations highlight the main actions that need to be taken in order to uphold the health of Mannar's marine ecosystems, while laying the framework for a more diverse and dynamic tourism industry.

#### Zoning Recommendations

##### *Short-term*

- Government-led communication campaigns/outreach to the fishery community. Previous efforts to place demarcation buoys (for the Mannar Marine Park tourism development project) led to protests by the fishery sector, primarily due to the assumption that this would prevent fishery activities and seaweed collection. Therefore, improved communication is needed to bridge relations with the fishery community to build trust that future development and demarcations will not harm their activities. (Deliverable 1, Scope 2)
- Carrying capacity and activity limitation study. It is suggested to conduct carrying capacity and activity limitation studies for Mannar as there have been a lack of previous studies or assessments to measure the impact of tourism on the marine environment. With areas that were once secluded becoming more attractive to tourists, and considering that Mannar's main appeal is its natural assets, these studies are crucial to preventing over-tourism, or unsustainable development from harming local biodiversity and coastal areas. Best practice applications can be taken from the Indian side of the Gulf of Mannar, where activity limitation studies have been performed to restrict visitation and put a cap on activities for scuba diving, snorkeling and glass bottom boats to maintain the quality and quantity of the area's marine species. It is further suggested that CEA conduct an environmental impact assessment to inform future tourism development planning. (Empirical findings, Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base, Meeting with Government officials in Mannar)
- Assessment/study to determine vulnerable coastal areas in Mannar. A climate vulnerability study, similar to the study conducted for Jaffna ("Potential Impacts of Sea-Level Rise upon the Jaffna Peninsula"), is suggested to assess Mannar's climate vulnerability, outline the areas at-risk of climate impacts and strategize methods to mitigate the effects of climate change on Mannar's industries including the tourism industry. (Empirical findings)

##### *Medium-term*

- Re-location and erosion protection support for tourism establishments (re-location and coastal security measures) The 50 meter coastal zone parameter suggests moving the development of permanent structures, including tourism infrastructure, outside of the greenbelt, and using the zone to strengthen the resilience of existing site-specific coastal areas through improved planning and implementation mechanisms. (Deliverable 3, Scope 2)
- Re-evaluating development projects and resource extraction. Further development considerations outlined by UNDP ("Updated Landscape Strategy for Building Social, Economic, and Ecological Resilience in Mannar Coastal Landscape"<sup>45</sup>) identified illegal sand mining, wind turbine projects, timber and firewood extraction and agricultural activities as contributors to Mannar's land degradation and erosion. Additional reviews should also be conducted on the 250 MW Mannar Wind Power Project (Phase-II)<sup>46</sup> to address current shortcomings as the project poses risks to ecological and economic continuity, with impacts extending beyond Mannar. It is recommended to re-evaluate each of these development projects to ensure that there is alignment with Mannar's intentions for sustainability and tourism ambitions. (Deliverable 3, Scope 2)
- Additional Naval support to the coast guard and tourism activities. As tourism to Mannar increases,

<sup>45</sup> *Updated Landscape Strategy For Building Social, Economic And Ecological Resilience In Mannar Coastal Landscape: UNDP/GEF/ SGP - Operations Phase 7.* (2023). UNDP. <https://www.undp.org/sites/g/files/zskgke326/files/2023-05/Mannar%20Landscape%20Strategy%2005-05-2023.pdf>

<sup>46</sup> Dullewe, B. M. (n.d.). *Mannar Wind Power Project (Phase II): CEA to conduct a technical review. Latest in the News Sphere | the Morning.* <https://www.themorning.lk/articles/hgmPTtoFyqjxinGrgq7K>

more naval supervision will be needed for activities that require their support, including marine tourism activities. (Empirical findings, Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)

- Capacity (within the Navy) to enforce activity limitations. The Navy stated that they require support to limit visitors in protected or vulnerable areas through online booking systems or by increasing capacity at sites. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)

#### Long-term

- Disaster risk management plan that includes climate change mitigation and adaptation plans to combat sea level rise and protect tourism assets in vulnerable and low-lying areas. Challenges from sea level rise and erosion leave Mannar's coastal and low-lying businesses particularly vulnerable. Hence, a DRM plan will need to assess the feasibility of developing housing, accommodations, attractions, and other infrastructure in Mannar's coastal areas, additionally providing disaster-proofing strategies and measures in new and existing tourism infrastructure and development projects. (Meeting with private sector stakeholders in Mannar, Deliverable 3, Scope 2)
- Development of a "multi-purpose" greenbelt. This entails a development parameter in the coastal zone of 50 meters in width to reduce the impact from storms and potential tsunamis. The zone, in line with regulations by the CCD, would prevent any new permanent structures from being built, requiring all activities to take place outside the zone with planning and implementation focusing on adding safety measures to strengthen the areas' site-specific vulnerabilities. (Deliverable 3, Scope 2)
- Development of an Eco-tourism zone. To support efforts in promoting eco-tourism, it is suggested to establish an eco-tourism zone within existing tourism areas or in preserved areas such as the Adam's Bridge National Park: a recommendation underlined by the Mannar Island Development Plan 2030<sup>47</sup>. The establishment of an eco-tourism zone would enable the careful selection of areas where specific eco-tourism activities are exclusively permitted, fostering the creation of a comprehensive eco-tourism management plan. This strategy is further recommended to employ best practices from the model employed by India's Gulf of Mannar Biosphere Reserve (GoMBR)<sup>48</sup>, where an eco-tourism zone has been established within the Gulf of Mannar Marine National Park with oversight provided by eco-tourism officers, who manage activities within the zone. (Deliverable 3, Scope 2)

### Conservation Management Recommendations

#### Short-term

- Eradication of dynamite fishing and other illegal fishing practices including bottom trawling. The diving industry cannot be comprehensively developed while dynamite fishing is present in the area. Diving in areas where dynamite fishing may occur can cause health and safety concerns and severe injury to divers. The current punishments are not enough to stop 100-200 boats coming mostly at night, regardless of fines or jail time. It is recommended to enhance compliance with the current bans on these practices by improving monitoring and reporting capabilities (beyond individual reports filed by fishermen). (Empirical findings, Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base, Meeting with Government officials in Mannar)
- Additional protections for marine biodiversity. It is necessary to have additional protections in areas rich with marine biodiversity and natural assets, especially marine protected areas and environmentally sensitive areas. Protections should go hand in hand with UDA plans to develop land, ESAs and any planning of future nature parks. (Deliverable 3, Scope 2)
- Protections for archaeological, cultural and historical sites pertaining to maritime heritage. Increased protections fall in line with development priorities underlined by the Mannar Development Plan for 2030<sup>49</sup> which include: preserving archaeological, cultural and historical sites, ensuring the sustainable use of fish species (in the Gulf of Mannar Biosphere), and conserving

<sup>47</sup> Mannar Island Development Plan 2019-2030. (2019). Urban Development Authority. [https://www.uda.gov.lk/attachments/outdated\\_dev\\_plans/Mannar/English-r.pdf](https://www.uda.gov.lk/attachments/outdated_dev_plans/Mannar/English-r.pdf)

<sup>48</sup> Gulf of Mannar Marine National Park and Biosphere Reserve. (n.d.). Ramsar Sites Information Service. [https://rsis Ramsar.org/RISapp/files/42455145/documents/IN2472\\_mgt220601.pdf](https://rsis Ramsar.org/RISapp/files/42455145/documents/IN2472_mgt220601.pdf)

<sup>49</sup> Mannar Development Plan 2030: Volume 1. (n.d.). The Urban Development Authority. [https://www.uda.gov.lk/attachments/devplan\\_de-tailed/for\\_public\\_comments/FINAL\\_MANNAR\\_%20Volume%20I%20&%20II.pdf](https://www.uda.gov.lk/attachments/devplan_de-tailed/for_public_comments/FINAL_MANNAR_%20Volume%20I%20&%20II.pdf)

the area's sand dunes, which fall under protections mandated by the Dept. of Wildlife. (Deliverable 3, Scope 2)

#### *Medium-term*

- Green energy infrastructure for transportation. Considering the unique character of climate and wind, there is vast potential for renewable energy such as wind power and solar energy. The Sustainable Energy Authority (SEA) identified Mannar Island<sup>50</sup> as one of the richest sustainable energy generating sources in Sri Lanka. Therefore, increasing the area's capabilities and access to renewable energy resources would stabilize the tourism sectors' access to clean energy in Mannar and the Northern Province, presenting a more affordable and sustainable option. (Deliverable 1, Scope 2)
- Coordination and project collaboration between MEPA, CEA and the 20 different NGOs operating to work towards livelihood creation that prioritizes conservation through community engagement, gender equality and other identity-based initiatives. (Meeting with Government Officials in Mannar)
- Support for the development of NGOs focused solely on marine sustainability to enhance the conservation around marine assets with an emphasis on marine ecosystems that are integrated into tourism activities i.e. coral reefs. (Meeting with Government Officials in Mannar)

#### *Long-term*

- Tourism promotional campaigns, showing the positive impact of conservation initiatives with explanations as to why attractions such as Adam's Bridge are not currently open to the public as a protected area. Stakeholders shared that tourists that come to Mannar are particularly interested and concerned about the area's conservation, hence these types of campaigns would provide positive PR and reassurance that areas are adequately protected. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)

## **Deliverable 4: Key Infrastructure Recommendation**

Apart from the lack of activities, Mannar is largely considered to be underdeveloped in terms of hard infrastructure. Therefore, there is an overall need to introduce basic infrastructure in areas frequented by tourists. Rest-rooms, changing areas, potable water, sunbeds and other tourist amenities are particularly in demand as are improved tourist communication and waste collection processes. Marine tourism infrastructure, including jetties and tourism boats, are also necessary to enhance the area's future growth potential, supported by a well-equipped workforce that provides alternative and complementary job opportunities for those working in the fishery and aquaculture sectors.

Differing from competing destinations along the coast of Sri Lanka, Mannar's coral reefs appear to be thriving, though dynamite fishing and bottom trawling threaten the area's marine ecosystems. While regulations are in place to limit tourism activities in vulnerable and protected areas, additional enforcement capacity and physical demarcations are needed to preserve Mannar's marine and coastal ecosystems. Challenges around bureaucracy present significant barriers to tourism development, often which prevent and delay tourists from being able to access coastal and terrestrial wildlife sites. Restrictions often complicate bookings for bird watching activities, guided nature tours and kite surfing, and prohibit diving activities altogether. The need for approvals and the uncertainty around obtaining permissions often deters tourists from applying, thus slowing down tourism development and the promotion of Mannar as a tourist destination.

The table below highlights the different types of infrastructure development and upgrades that are needed to bridge these existing gaps, while avoiding unsustainable activities and increasing tourist satisfaction

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<sup>50</sup> Mannar Island Development Plan 2019-2030. (2019). Urban Development Authority. [https://www.uda.gov.lk/attachments/outdated\\_dev\\_plans/Mannar/English-r.pdf](https://www.uda.gov.lk/attachments/outdated_dev_plans/Mannar/English-r.pdf)

N.	Destination	Project category	Type of infrastructure (Project)	Authority	Recommended Adjacent Locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches & Harbour	Tourism Infrastructure	Basic infrastructure (Public toilets, changing rooms, showers, and sunbeds)	Urban Development Authority (UDA), Provincial Council, Private Sector (PS), Sri Lanka Tourism Development Authority (SLTDA), Fisheries and Harbour Cooperation, CEA	Talaimannar Pier, Keeri Beach, Gulf of Mannar & Marine National Park Biosphere Reserve, Vankalai Lagoon, Yoda Weda Sanctuary, Pesalai Fishing Village	Short-term	Hard infrastructure
			Drinking water	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier, Keeri Beach	Short-term	Hard infrastructure/Investment
			Jetty (for boats and yachts)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier	Long-term	Hard infrastructure/investment
			Upgrade to Talaimannar Pier	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier	Long-term	Hard infrastructure/investment
			Boat infrastructure (high speed boats)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier	Medium-term	Hard infrastructure/investment
			Fishery infrastructure	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier	Medium-term	Hard infrastructure/investment
			Certification (i.e. Blue Flag)	SLTDA, Department of Wildlife , CCD, Coast Guard, Navy, Ministry of Tourism, CEA	To be determined.	Long-term	Regulatory
		Waste Infrastructure	Waste bins	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Talaimannar Pier, Keeri Beach, Gulf of Mannar & Marine National Park Biosphere Reserve, Vankalai Lagoon, Yoda Weda Sanctuary, Pesalai Fishing Village	Short-term	Hard infrastructure
			Waste management system	UDA, Provincial Council, PS, SLTDA , CEA	Town	Short-term	Regulatory
		Regulatory infrastructure	Demarcation buoys	CCD, National Aquatic Resources Research and Development Agency ( NARA) , Marine Environmental Protection Authority (MEPA), CEA	Talaimannar Pier, and other areas where tourism and fishery activities overlap.	Short-term	Hard infrastructure/Regulatory
			Permission granting process (with Navy) for access to tourism sites/wildlife areas/coastal activities	CCD, National Aquatic Resources Research and Development Agency (NARA), Marine Environmental Protection Authority (MEPA), CEA	Town	Short-term	Regulatory

2	Town centre and outskirts	Transport infrastructure (green infrastructure)	Bike and e-bike rental	SLTDA, UDA	Town	Long-term	Investment
		Transportation infrastructure (in Mannar)	Road enhancements (support of the movement of goods) Improved connections between different modes of transport, service centres, and fishing camps on the South and North coasts of the island)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation	Town	Long-term	Investment
		Transportation infrastructure (to/from Mannar)	Boat infrastructure (to and from India)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation	Town	Long-term	Investment/ hard infrastructure
		Tourism infrastructure	Souvenir shops	UDA, Provincial Council, SLTDA	Town	Short-term	Investment/ hard infrastructure
			Registration with SLTDA	SLTDA	Town	Long-term	Regulatory
			Eco-tourism resort development	UDA, Provincial Council, Private Sector, SLTDA, CEA	Town, Environment and Tourism Zone	Long-term	Investment
		Capacity building	Vocational training schools/ programs	Ministry of Tourism, Ministry of Education, SLTDA	Town	Medium-term	Investment

## Infrastructure Recommendations

The following section summarizes each infrastructure recommendation. A comprehensive list can be found in the chart above, with further elaboration in the Mannar section of Deliverable 4.

### *Short-term*

- Introducing basic infrastructure such as bathrooms, showers, changing areas and sunbeds to improve the tourism experience for those visiting Mannar's beach and coastal areas. Infrastructure is particularly needed at Keeri Beach, the main beach that tourists come to for leisure activities, swimming and sunbathing. (Empirical findings, Meetings with Navy, local government officers at Talaimannar Pier, Navy base, Meetings with private sector stakeholders in Mannar)
- Drinking water, there is no potable water available in tourist areas. Therefore, it is suggested to add potable water infrastructure that is supported by tourism-friendly signage to communicate that it is safe to drink. (Empirical findings, Meetings with Navy, local government officers at Talaimannar Pier, Navy base)
- Waste collection (waste bins) in highly trafficked public areas throughout Mannar to prevent contact with marine and terrestrial biodiversity and demonstrate to community members that increased tourism will not worsen the current pollution crisis. (Empirical findings, Meetings with Navy, local government officers at Talaimannar Pier, Navy base, Meeting with Government officials)
- Demarcation buoys as a preventative measure to avoid conflict between the tourism and fishery sector. (Deliverable 1, Scope 2, and Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base and Meeting with Government officials in Mannar)
- Tourist communication to avoid unsustainable behaviour including the littering of plastic pollution and the disturbing of natural habitats in environmentally sensitive areas and other protected areas. (Meeting with Government officials in Mannar)
- Accessibility to tourist sites (permission granting process) (by the Navy) so that sites can be accessed by tourists and guides in a transparent, equitable and timely manner. (Meeting with Government officials in Mannar)
- Add souvenir shops and tourist markets to incentivize tourists to stay longer at the destination. (Meeting with Government officials in Mannar)

### *Medium-term*

- Jetty construction to avoid boats from docking on the beach-front and improve docking conditions for boats and other marine vessels, such as yachts. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)
- Boat infrastructure (international standard) that improves comfort and enables faster service, potentially extending high quality high speed boat services to service routes between Mannar and India. (Empirical findings, Deliverable 1, Scope 2)
- Fishery infrastructure such as fishing tools, storage areas and demarcating harbour areas for fishing boats to build trust and enhance relations between the fishery and tourism sectors, while encouraging their participation with leading fishing experiences or tours. (Deliverable 1, Scope 2 and Meetings with private sector stakeholders)
- Tourism workforce training and capacity building. Locals, and specifically women, should be provided with the chance to support activities within Mannar, including tourism-related ventures such as tour guiding and other jobs in the hospitality industry. Campaigns should additionally aim to mitigate the stigma around working in the tourism and hospitality industries, demonstrating that it is a respectable and stable career choice. (Deliverable 3, Scope 2, Meeting with government officials in Mannar)

### *Long-term*

- Transportation infrastructure (in Mannar) to improve road and transport connections between south and north coasts of the island to facilitate tourism, tourist travel and the transportation of goods to alleviate the main connectivity-related stressors on local supply chains. (Deliverable 1, Scope 2, Deliverable 1, Scope 2, Meeting with Government officials in Mannar)
- Transportation infrastructure (to and from Mannar) through road enhancements and boat connections to/from India. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base, Meeting with Government officials in Mannar)
- Upgrade to Talaimannar Pier to accommodate passenger vessels and function as a landing location



for vessels coming from India. (Deliverable 3, Scope 2, Meeting with Government officials in Mannar)

- Waste management system to cope with the area's sewage output, ensure compliance and spread awareness on local recycling facilities. (Empirical findings, Meetings with Navy, local government officers at Talaimannar Pier, Navy base)
- Promoting registration with SLTDA to promote registration with SLTDA amongst tourism establishments to mitigate the impact of unsustainable activities. (Deliverable 2, Scope 2, Comments by SLTDA)
- Eco-tourism resort development as an alternative to large-scale resort development and keep to the area's authenticity in both architectural design and in its activities. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)
- Public bike and e-bike rental/charging stations, adding "green" infrastructure for bike and electric bike rentals (and charging areas) to allow for tourists to explore nature areas and the many different areas of Mannar. (Deliverable 2, Scope 2)
- Blue Flag Certification to promote sustainable development in Mannar's coastal areas. (Meeting with Government officials in Mannar)
- Destination development and marketing strategy disseminated by travel agents, tourism operators and other tourism stakeholders conduct additional promotional tourism campaigns aimed at domestic tourists to generate local interest in Mannar's wildlife tourism and ancient history. (Deliverable 3, Scope 2, and Meeting with private sector stakeholders in Mannar)

## **Deliverable 5: Mannar's Tourism Anchor Products**

Home to one of the most biologically diverse regions on earth, Mannar attracts nature enthusiasts to its surrounding biodiversity, particularly those interested in bird watching and other nature-based tourism activities. However, very few activities are currently available in Mannar apart from wildlife watching and visits to historical, cultural and religious sites of interest. According to stakeholders, Mannar's biggest tourism potential lies in its ability to eventually offer high-quality nature tours, kite surfing, diving/snorkeling, canoeing, camping and other niche luxury accommodations.

The following activities have been identified as Mannar's potential marine tourism anchor products.

### Wildlife sightseeing/ Eco-tourism

Up until now, most of the tourism to Mannar has been small-scale and nature-focused with bird watching and other forms of wildlife sightseeing experiences making up a large portion of tourism activities. Mannar Bird Sanctuary, lagoon ecosystems and islands' landscapes host marine and terrestrial wildlife including wild horses, flamingos, and rare bird species. Many of the tourist guides specialize in bird watching and are found through promotion efforts by hotels. Bird guides often work together with the local guides to cater to the tourists' demands.

Efforts to support and promote the industry include:

- Activity limitation study (to prevent environmental consequences from tourism activities)
- Mapping of current eco-tourism offering (determine where support is needed)
- Tourism signage for protected areas or other forms of demarcation of areas such as sand dunes that are off limits
- Support for tourism service providers offering low-impact activities
- Enhanced protections for marine and terrestrial wildlife, incl. a tourism code of conduct
- Creation of a specific eco-tourism zone (on top of Zone 6, Environment and Tourism zone)

### Visits to historical, cultural and religious sites

Mannar Fort, Thanthirimale, an ancient temple and village over 2200 years old, Thiruketheeswaram temple and Talaimannar Lighthouse are the most popular sites of interest. Adam's Bridge, while closed to the public, holds significance as the bridge between Sri Lanka and India, symbolic of the existing and growing ties between the two nations.

Efforts to support and promote the industry include:

- Cohesive narrative about Mannar's maritime heritage
- Creation of maritime museums or special exhibits on Mannar's maritime heritage
- Tourist signage on Mannar's historical role, elaborating on the lighthouse and pier which once served as a ferry terminal
- Establishing a community-approved narrative around the historical significance of sites
- Develop specific conservation efforts (on top of existing efforts) for Adam's Bridge to act as a precursor for re-integrating tourism activities or visits to the site.
- Determine the activities that would be appropriate for Adam's Bridge, particularly biodiversity-specific activities and others related to religious pilgrimage.

### Kitesurfing/Windsurfing

Tourists visiting the Northern Province can take part in kitesurfing/windsurfing, which is promoted by a few coastal hotels. Without promotion, many tourists who visit Mannar are often unaware of the possibility of taking part in these tourism activities. To date, a small number of tourists come to Mannar specifically for kitesurfing activities, but these tourists are in the minority.

Efforts to support and promote the industry include:

- Basic infrastructure
- Equipment rentals

- Activity limitation study on the impacts of kite surfing on the marine environment and surrounding marine and coastal biodiversity
- Ease regulations on wind/kite surfing to allow for the activity to grow
- Promotion of wind/kite surfing as a tourism activity

### Diving and snorkeling

Mannar, home to the Marine National Park Biosphere Reserve (GOMBR) and one of the most biodiverse regions on earth, presents the opportunity for tourists to see one of the most unique marine ecosystems. Mannar's rich history as a hub for pearl diving along with the existence of its lost port city, differentiate the destination from other popular diving destinations with the potential to build Mannar's identity around its sites of interest. Though the activities of diving and snorkeling are prohibited, Mannar is home to ideal locations for beginner divers and snorkelers.

Efforts to support and promote the industry include:

- Relax restrictions on diving via the Marine Tourism Steering Committee (after studies have determined activity limitations)
- Developing the diving/snorkeling industry (i.e. establish a diving centre and areas with equipment rentals)
- Preventing dynamite fishing
- Facilitating research to be undertaken on the "lost port of Mannar"
- Creation of cohesive tourism narrative and tagline like "Discover the lost port city of Mannar"
- Development of specialized tours, communication materials and marketing campaigns focused on Mannar's maritime history

### Boating/yachting/sailing

Mannar has the opportunity to grow its marine tourism offering around boating, yachting and other leisure activities like sailing for day trips, tours or multi-day trips. Envisioned as becoming Sri Lanka's "headquarters for yachting tourism", Mannar, has the ability to be a starting point for a yachting corridor stretching from its location on the west coast, to Jaffna in the north and Trincomalee in the east.

Efforts to support and promote the industry include:

- High speed boats for tours
- Re-opening the Talaimannar Pier (to tourists coming from India)
- Infrastructure for a jetty, docking capabilities, amenities for luxury tourists, other yacht infrastructure or yacht clubs..etc...
- Activities on offshore islands to attract tourists
- Promotion of Mannar as a boating destination once infrastructure has been established

### Fishing

The concept of community-based tourism is being championed by the Mannar Chamber of Commerce as part of Mannar's future tourism strategy. Fishing villages in Mannar have already begun incorporating tourists into their activities, with fishermen taking a formative role in engaging tourists in their daily activities. Considering that Mannar's fishing industry is one of its most robust economic drivers, merging tourism together with fishing activities could benefit both locals and the growth of Mannar's reputation as a fishing destination. Activities should focus on highlighting traditional fishing practices to ensure that practices remain sustainable, prioritizing this method in tourism product development over "sport-fishing" or "deep sea fishing".

Efforts to support and promote the industry include:

- Support the development of tourism products and services centred around community-based tourism and traditional fishing practices
- Build capacity within the fishing industry to lead tours, while spreading awareness about how both industries can benefit from these activities
- Enforcing ban on dynamite fishing/raising awareness
- Demarcating areas for fishery sector

## Citizen science/voluntourism

Mannar's biodiverse waters and multi-faceted aquaculture industry make it an ideal location for scientific research and citizen science programs that study, monitor, evaluate the quality and quantity of marine life and coastal species. This also presents the opportunity to involve international experts and students looking to lend their expertise and learn about conservation and preservation efforts on the ground.

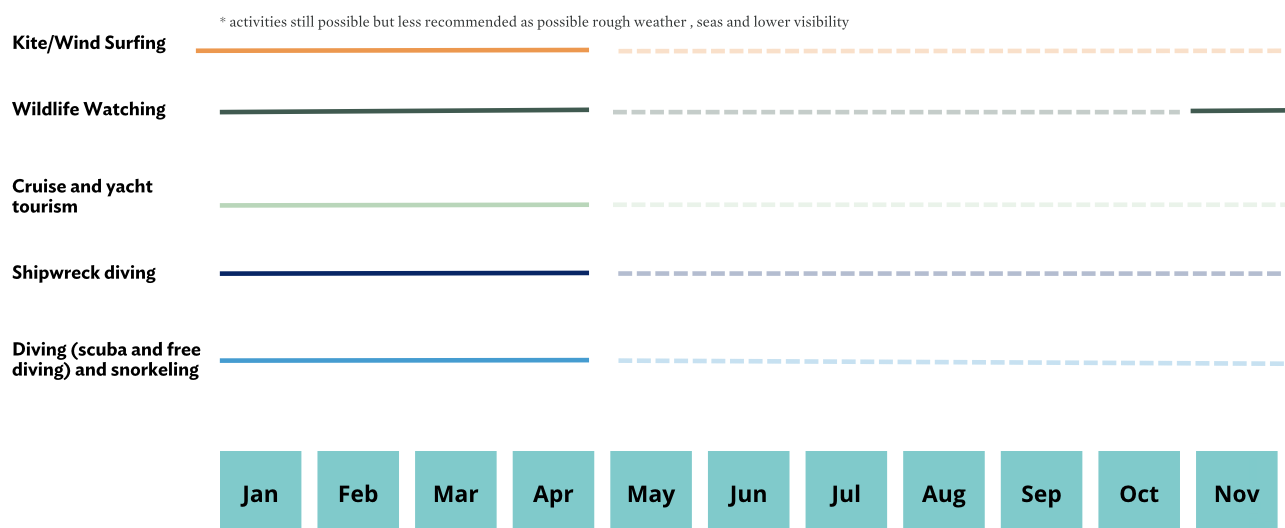
Efforts to support and promote the industry include:

- Developing aquaculture industries
- Facilitating citizen science voluntourism experiences
- Support conservation centres with financial and technical support
- Creating partnerships with universities
- Open marine protected areas up for researchers and academics to study marine biodiversity (with special permissions given for sensitive areas)
- Leading training and capacity building within the aquaculture industry to help them engage tourists in activities
- Integrate support for programs under conservation and protection efforts

## Mannar's Seasonality

The tourism season in Mannar is from November through April, with the busiest time following the month of January, when domestic tourism is at its height. Monsoon season, which runs from October to January, follows the pattern of the Maha monsoon, affecting the northern and eastern part of Sri Lanka. During this period, the sea can be rough, presenting less than ideal conditions for diving and snorkeling, although calm waters and good conditions are sometimes found in November and December. During this same period, bird migration reaches its peak, running from November to April, bringing in many avid birdwatchers.

## Seasonality of Mannar's tourism products



## Alternative activities to combat seasonality

- Visits to historical and cultural sites, and museums tied to Mannar's maritime heritage
- Community-based tourism activities
- Voluntourism activities
- Research (citizen science)

## Summary of Mannar's infrastructure needs per tourism activity

Type of activity	Infrastructure gaps and needs	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife sightseeing/eco-tourism	Basic infrastructure Guides and ready-to-book tour offerings Communication about wildlife found in the area	Short-term	Development of bird watching (as the area's "mascot" anchor product Promotion of new nature centre (and naturewalks/walkways) Capacity building for local guides Tourist signage Conservation of the quality of the area's water and soil and ecosystems Eco-tourism development in the Environment and Tourism Zone 6) Development of low impact activities (i.e. canoeing)	Mannar Bird Sanctuary (Vankalai Lagoon), Yoda Weda Sanctuary	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Visits to historical, cultural and religious sites	Signage (at tourist sites) Cohesive narrative about Mannar's maritime heritage (using branding to re-enforce this narrative)	Short-term	Communication about protected areas (including those closed to the public i.e. Adam's Bridge, to demonstrate conservation efforts	Talaimannar Lighthouse, Mannar Fort, Thiruketh-eeswaram temple	Yes	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Windsurfing/kite surfing	Basic infrastructure at beaches Equipment Promotion/awareness about kitesurfing activities (rentals and lessons) to meet existing demand	Short-term	VAT incentive for Sri Lankan-made products Support to scale activity (run by operators, hotels and resorts) Promotion as an anchor product	Keeri Beach, Gulf of Mannar, Vankalai Lagoon	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Diving/snorkeling	Basic infrastructure at beaches Dive centre Sites for diving are off-limits Tourism operators Areas to rent equipment	Medium-term	VAT concession for equipment Streamlined permission granting process Re-visiting diving/snorkeling as permitted activities Navy re-assurance campaign Reef conservation (eradicating dynamite fishing) Performing an activity limitation study to prevent harm	Keeri Beach, Gulf of Mannar, Vankalai Lagoon	No	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Boating/yachting/cruising	Yachting/boating infrastructure (boats dock on the beach) Promotion for boat tours	Long-term	Promotion and development of boat tours (especially for sea-bird watching) Adding a jetty or docking area so that marine vessels such as yachts could be accommodated Developing a yachting corridor between Mannar, Jaffna and Trincomalee	Mannar Bird Sanctuary (Vankalai Lagoon), Yoda Weda Sanctuary	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Fishing	Demarcations for fishing activities (to alleviate conflict with the sea cucumber farms) Training and capacity building for fishermen Enforcing ban on dynamite fishing	Short-term	Building landing pads that could be shared for fishing and tourist boats Developing community-based tourism activities (as part of a wider CBT strategy) Upskilling fishermen to become guides and to lead fishing experiences Promotion of fishing village Conservation of reef	Talaimannar Pier, Keeri Beach, Gulf of Mannar, Pesalai Fishing Village	No	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Citizen science/voluntourism	Partnerships between conservation centres and universities Voluntourism activities	Medium-term	Developing aquaculture citizen science and other voluntourism experiences to support existing industries (i.e. sea cucumber farming) Promote and develop aquaculture-based industries (following the Physical Plan for the Northern Province) Open area up for researchers and academics to study marine biodiversity (with special permissions given for sensitive areas)	Talaimannar Lighthouse, Dutch fort (Arippu Dutch Fort) and Mannar Fort, Thiruketh-eeswaram temple	No	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

## Development Strategies

### *Short-term*

- Meeting between key stakeholders to determine a common vision for tourism development in Mannar, providing the opportunity to discuss practical matters such as restrictions, permissions, anchor products and other important topics prior to undertaking tourism development, so that the process is inclusive and cohesive, allowing for the best outcomes. This will additionally support the streamlining of processes and improve constraints from bureaucracy and help tourism organizations better benefit from tourism. Overall, there is a need to enhance coordination between authorities to manage and develop tourism. (Meeting with Government officials in Mannar and Meetings on Delft Island)
- High speed boats for a more comfortable visit experience, with the option of enhancing accessibility to/from India. (Deliverable 1, Scope 2)
- Expand ferry service to eventually service routes between Mannar and Jaffna and Mannar and other destinations in the Northern Province. (Deliverable 1, Scope 2)
- Streamline approval permission granting process (by the Navy) so that tourists can access coastal and marine areas. The process currently takes up to 48 hours (which tourists are not aware of) and therefore do not wait for approval or simply do not receive approval at all. (Meeting with Government officials in Mannar)
- Site guide licenses and programs for tour guides should be used to support those wanting to become tour guides. Such initiatives should provide support and a lucrative salary, to further entice others in the community to want to join the program and other similar tourism upskilling initiatives. (Meeting with private sector stakeholders in Mannar)
- Community representation in the Marine Tourism Steering Committee as a means of providing a voice on the community perspectives on tourism development. (Meeting with private sector stakeholders in Mannar)

### *Medium-term*

- Community-integration through communications, forums and other consultations with local community members. Community concerns about development in general have hindered foreign investment and impeded the realization of tourism planning efforts. (Deliverable 3, Scope 2)
- Capacity building to increase the capacity for local guides. Most tour guides are working on a freelance or independent basis, with bookings remaining largely inconsistent. There is already a small number of tourist guides operating, mostly for bird watching, who are promoted by hotels. More is needed to facilitate collaboration between local guides and tourism establishments to meet a wide array of tourist interests and groups of different sizes (over 5+ tourists). (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base and Meeting on Delft Island)
- Training and capacity building for a local tourism workforce. Hotels are finding it difficult to hire trained staff members, leading to many working on a rotational basis. Due to the fact that there are so few job opportunities, very few locals decide to pursue hospitality or tourism training to obtain the necessary qualifications. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)

### *Long-term*

- Expand capacity for tourism accommodations. There is a need for additional accommodations to enable tourists to stay overnight and for extended stays in Mannar. (Meeting with Navy officers, local government officers at Talaimannar Pier, Navy base)
- Eco-tourism development. Reviving the pre-pandemic project concept between UNDP and Vidaththaltivu Eco-tourism Society to develop eco-tourism activities that support the area's coral reefs and mangroves particularly in the areas around Vidaththaltivu (Mannar). (As per forwarded email correspondence between Dept of Wildlife Conservation and relevant parties mentioned above)
- Feasibility study and designation of Mannar's 28 outer islands. Such studies should underline the islands' biggest opportunities and determine a plan of action to move development forward. (Meeting with Government officials in Mannar)



## North-Eastern Coastal Belt

### Deliverable 3: Spatial and Zonation Plans

The following recommendations for the North eastern coastal belt underline the area's need for additional measures, studies and assessments to ensure that new tourism development projects are environmentally sustainable, climate-resilient and well thought out prior to moving forward. Conservation-specific suggestions additionally highlight the need to extend protections for the area's lagoons and other environmentally sensitive areas and marine habitats.

#### Zoning Recommendations

##### Short-term

- Carrying capacity and activity limitation studies. It is suggested to conduct carrying capacity and activity limitation studies for the Northern Province and for each of the target destinations to establish a common metric that can be used to assess the sustainability of each destination. These studies can be used as a means of developing indicators and informing initial tourism planning and promotion efforts. (Deliverable 3, Scope 2)
- Precautionary measures including Environmental Impact Assessments and other evaluation tools are needed in areas that are designated for tourism development (in Mullaitivu district) to monitor and manage any potential adverse effects on environmentally sensitive areas. (Deliverable 3, Scope 2)

##### Medium-term

- Coastal protection/counter-erosion measures to counter sea level rise and inundation. Measures should reflect the preparedness efforts captured by the “coastal green belt project”, employing natural protective methods and nature-based solutions that are self-sustaining post-natural hazards or as a result of long-term changes. Solutions should aim to secure the shoreline, additionally trapping sediment in coastal areas. (Deliverable 3, Scope 2)

##### Long-term

- Development of a disaster risk management strategy. The Mullaitivu Disaster Risk Reduction and Preparedness Plan<sup>51</sup> is the main disaster risk management (DRM) strategy, using structural and non structural measures to secure the coastline and target sea level rise. A DRM strategy should build on top of the preparedness plan to turn Mullaitivu into a sustainable and resilient city. These efforts should be focused on supporting technological applications, such as GIS modeling techniques and data gathering mechanisms to avoid developing tourism plans in areas that are prone to inundation and climate change-related impacts such as sea level rise; a particularly important issue for Mullaitivu. (Deliverable 3, Scope 2)
- Develop disaster-proofing regulations and other measures to incentivize tourism businesses and accommodations to employ disaster-proof construction methods (i.e. by sourcing disaster-proof materials and using nature-based solutions) and assess the feasibility of building in areas that could become inundated and instead opting for areas that are more secure. (Deliverable 3, Scope 2)

#### Conservation Management Recommendations

##### Short-term

- Eradicating dynamite fishing, which is occurring in the area and decimating the health of coral reefs in the “belt” area in addition to nearby Trincomalee. (Meeting with tourism operators at Mullaitivu/Trincomalee area)
- Training and capacity building to create integrated livelihoods for locals, i.e. tour guides, community-based tourism, maintaining nature trails, and encouraging a participatory approach through restoration projects. (Deliverable 3, Scope 2)

<sup>51</sup> Mullaitivu Disaster Risk Reduction and Preparedness Plan. (2015). United Nations Human Settlements Programme (UN-Habitat) - Sri Lanka. <https://unhabitat.lk/wp-content/uploads/2015/01/DRRMullaitivu.pdf>

#### Medium-term

- Protection status for wildlife and marine habitats. Additional conservation efforts and protected statuses are needed for bird sanctuaries (i.e. Najaru lagoon), and other lagoons in the area around Mullaitivu, wildlife reserves, forest areas, coastal areas and archaeologically important sites to enhance the impact of existing national laws and regulations. (Deliverable 3, Scope 2)
- Conservation support for environmentally sensitive areas (ESAs). On top of coastal areas and vulnerable marine habitats, environmentally sensitive areas were determined by the Lessons Learnt and Reconciliation Commission (LLRC) as “in need” of conservation support. Conservation support should be given to Kokkilai Lagoon & Sanctuary, Chundikulam National Park or other coastal and marine areas. The plan to do so has been tabled due to a lack of funds. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area, Deliverable 3, Scope 2)

#### Long-term

- Wildlife conservation through the creation of a wildlife corridor. It is suggested to establish wildlife corridors for conservation activities and eco-tourism experiences in the “belt” area, following the ambitions of the “coastal green belt project”<sup>52</sup>, which recommended the integration of conservation activities into tourism products. (Deliverable 3, Scope 2)
- Conservation efforts to combat pollution, illegal construction, unplanned tourism and other unsustainable activities that put marine and terrestrial species at risk in and around Kokkilai Sanctuary and Chundikulam National Park to preserve eco-tourism and sightseeing potential. This includes efforts to improve sewage processing and other waste management processes, which are lacking and leading to pollution. (Deliverable 3, Scope 2)

## Deliverable 4: Key Infrastructure Recommendation

Without the presence of an existing marine tourism industry, the north eastern coastal belt offers promising tourism development focused on its natural attractions, wildlife watching and historical sites of interest. While the potential for growth is palpable, the current tourism industry is still in its infancy. Tourism products and services, such as guided tours, wildlife watching excursions are “ad hoc” without the support of travel agencies or other booking platforms, resulting in slow and small-scale tourism growth.

Located in proximity to Trincomalee, the area stands to benefit from the stable and rapidly growing number of arrivals traveling to Sri Lanka’s north eastern coastline. While Trincomalee continues to provide diving, snorkeling and cruising tourism, the north eastern coastal belt has the chance to capture tourists seeking small-scale off-the-beaten-path experiences that bring them up close to wildlife. The ambitions for the “belt” hope to establish tour offerings, expand the area’s accommodation capacity and develop other amenities to build the area’s reputation for tourism.

The following table underlines the key infrastructural development that is recommended for the north eastern coastal belt to advance the area’s tourism competitiveness.

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<sup>52</sup> Mullaitivu Disaster Risk Reduction and Preparedness Plan. (2015). United Nations Human Settlements Programme (UN-Habitat) - Sri Lanka. <https://unhabitat.lk/wp-content/uploads/2015/01/DRRMullaitivu.pdf>

N.	Destination	Project category	Type of infrastructure (Project)	Authority	Recommended Adjacent Locations (if applicable)	Time period (for implementation)	Hard infrastructure or investment
1	Beaches & Harbour	Tourism infrastructure	Basic infrastructure (Public toilets, changing rooms, showers, and sunbeds)	Urban Development Authority (UDA), Provincial Council, Private Sector (PS), Sri Lanka Tourism Development Authority (SLTDA), Fisheries and Harbour Cooperation, CEA	Public beaches, Kokkilai Lagoon, Nandikadal Lagoon, Chundikulam National Park, Mullaitivu Town Centre Beach Park, Palmyra Island, Nayaruvu Vacation Island	Short-term	Hard infrastructure
			Marina and port infrastructure	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Mullaitivu	Medium-term	Hard infrastructure/ investment
			Boat infrastructure (for bird watching)	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Kokkilai Lagoon	Medium-term	Hard infrastructure/ investment
			Shopping area/ kiosk	UDA, Provincial Council, SLTDA	Town	Short-term	Investment/ hard infrastructure
			Tourist visitor centre	UDA, Provincial Council, SLTDA, Ministry of Tourism	Town	Short-term	Investment/ hard infrastructure
			Waste bins	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation, CEA	Public areas at public beaches, Kokkilai Lagoon, Nandikadal Lagoon, Chundikulam National Park, Mullaitivu Town Centre Beach Park, Palmyra Island, Nayaruvu Vacation Island	Short-term	Hard infrastructure
		Waste infrastructure	Waste management system	UDA, Provincial Council, PS, SLTDA, CEA	Town	Short-term	Regulatory

2	Town centre and outskirts	Transport infrastructure (green infrastructure)	Bike rental infrastructure	SLTDA, UDA	Town, Nayaruv Vacation Island	Medium-term	Investment
		Transportation infrastructure	Road enhancements	UDA, Provincial Council, PS, SLTDA, Fisheries and Harbour Cooperation	Town	Medium-term	Investment
		Tourism infrastructure	Shopping area/kiosk	UDA, Provincial Council, SLTDA	Town	Short-term	Investment/hard infrastructure
			Tourism information and signage	SLTDA, Ministry of Tourism	Town, Public beaches, Kokkilai Lagoon, Nandikadal Lagoon, Chundikulam National Park, Mullaitivu Town Centre Beach Park, Palmyra Island, Nayaruv Vacation Island	Short-term	Regulatory
			Resort development	UDA, Provincial Council, Private Sector, SLTDA, CEA	Town, Kuchchaveli Tourism Zone (KTZ)	Long-term	Investment
		Tourism development/Capacity building	Tourism activity development (Cataloging, ticketing and tours)	Ministry of Tourism, Ministry of Education, SLTDA, Navy, ADB	Town	Medium-term	Investment/regulatory
		Tourism development/Capacity building	Tourism development project	Ministry of Tourism, Private Sector, SLTDA, ADB	Town	Long-term	Investment

### *Short-term*

- Basic infrastructure, the lack of basic tourism infrastructure throughout the entirety of the north eastern coastal belt has kept investors from developing the area and funding resort and other luxury infrastructure projects. The level of existing basic infrastructure is unknown and reports are often conflicting, especially for waste management facilities, waste bins and bathrooms at tourism locations. Hence, facilities should be evaluated to determine if and where gaps exist and where they are lacking in highly trafficked areas. On top of evaluations, it is additionally recommended to add basic infrastructure for sunbathing and beach walks to improve the tourist experience. (Empirical findings, Meeting with High level stakeholders in Mullaitivu/Trincomalee area)
- Shopping area/kiosks so that tourists can purchase basic beach amenities and rent equipment, sunbeds and cabanas for the benefit of tourists traveling without equipment. (Deliverable 1, Scope 2)
- Tourism information and signage. Basic tourism communications (signage in English, Tamil and Sinhala) is needed in nature parks to disseminate information on the area's wildlife and tourism code of conduct including behaviours that should be avoided at sensitive areas (i.e. making noise, disturbing nesting areas, entering prohibited areas...etc.). Additional signage should be available at war monuments and other "dark tourism" sites. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 3, Scope 2)
- Tourist visitor centres should additionally support communication efforts to ensure that guests are adequately informed about the area's tourism offerings. Festivals and events such as the seafood festival should be promoted to tourists at the visitor and through print and digital communications materials and campaigns. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 3, Scope 2, Stakeholder recommendation)
- Waste bins and management processes are needed to prevent pollution from harming the area's wildlife, waterways and coastlines. Efforts should also be increased to keep beaches clean, scaling existing efforts by local authorities. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area)

### *Medium-term*

- Tour boats for bird watching (international standard) The boat infrastructure currently being used for tourism activities requires upgrades, including coverings that protect tourists from rain and sun. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 1, Scope 2)
- Tourism activity development (Cataloging, ticketing and tours) Stakeholders would like to see future tours along the lagoon along with beach development around Old Chemmalai beach, Nayaru beach and Mullaitivu beach. (Meeting with tourism operators at Mullaitivu/Trincomalee area)
- Marina and port infrastructure (Marina, port, jetties) to support the North-Eastern Coastal Belt intentions to become a multi-destination stop as current infrastructure can not accommodate multi-day vessels. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 1, Scope 2, Deliverable 3, Scope 2)
- Transport (Road repairs) Roads are particularly in need of repair and maintenance throughout "the belt", especially for the roads connecting Kuchachaveli, Mullaitivu and Trincomalee's beach areas. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area, Deliverable 1, Scope 2, Empirical findings)
- Bike rental infrastructure. Cycling has the potential to provide alternative transport options for tourists traveling from Mullaitivu town centre to Nayaru island. The area is suitable for tourism activities that integrate low impact cycling experiences into tours. (Deliverable 1, Scope 2)

### *Long-term*

- Tourism development projects. Stakeholders would like to proceed with a tourism development project with support from the Ministry of Tourism to develop a pond, bird watching area and 10 km-long boating route around the lagoon area. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area)
- Resort development projects that develop additional small-scale and sustainability-minded resorts, projects can transform small beach towns like Mullaitivu and Kilinochchi into sought out tourism destinations. The integrated resort project Master Plan envisioned the development of the prospective resorts to be constructed alongside eco-tourism experiences and water-based tourism

activities such as whale watching, shipwreck exploration, boating, surfing, swimming, cycling and trekking. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area, Deliverable 1, Scope 2, Deliverable 3, Scope 2)

## **Deliverable 5: North-Eastern Coastal Belt's Tourism Anchor Products**

The north eastern coastal belt provides tourists with the chance to see pelicans, flamingos, and other rare bird species in the wild, making birdwatching the area's most popular tourist activity. The "belts" historical significance during the civil war also attracts a steady stream of tourists looking to learn about Sri Lankan history and engage in niche "dark tourism" sightseeing. Mullaitivu, once a battleground during the civil war, offers various attractions related to the conflict, such as the war museum, the Monument of Victory, and the wreckage of submarines. Adding on to the area's existing tourism appeal, the marine areas in the "belt" present the opportunity to add water-based activities such as boating, snorkeling, fishing, and various forms of eco-tourism.

The following activities have been identified as the North-Eastern Coastal Belt's marine tourism anchor products.

### Wildlife watching

Encompassing the protected areas of Kokkilai Sanctuary and Chundikulam National Park as key natural assets, the north eastern coastal belt is an ideal destination for nature-minded tourists and bird watching enthusiasts seeking up close opportunities to observe rare birds and other wildlife including elephants and primate species. Mandated as an official wildlife sanctuary in 1951, covering lagoon, rivers, watering holes, mangroves, coastal strips and seagrass bed ecosystems, the area is full of potential to become a key tourism destination for those interested in wildlife watching experiences.

Efforts to support and promote the industry include:

- Protections for marine and terrestrial species
- Tourist signage and codes of conduct in environmentally sensitive areas
- Establishment of wildlife corridor(s)
- Promoting sanctuaries, lagoons and marine habitats
- Upskilling local guides

### Visits to historical/civil war sites

Having played a central role in the civil war conflict, the north eastern coastal belt carries a significant historical importance within the region, distinguishing it from other areas in the Northern Province and Sri Lanka. Mullaitivu, which once served as a battleground area, has sites of interest such as the Monument of Victory, various war museums and offshore submarine wrecks. These sites on top of first-person accounts of the conflict have the ability to attract tourists who are interested in the area's history.

Efforts to support and promote the industry include:

- Training and capacity building for local guides (to share first-hand knowledge about what it was like during the civil war conflict)
- Navy-led tours amongst the development of other niche tours (incl. for "dark tourism" sites)
- Tourism signage to communicate about monuments and other sites
- Promotion of the area as a tourism destination for those interested in Sri Lanka's history and culture

### Boating/yachting/cruising

The North-Eastern Coastal Belt's proximity to Trincomalee (to the south) and Jaffna to the north, provides the opportunity for the "belt" area to become a stop for multi-destination trips, especially for tourists traveling by yacht from Trincomalee to Jaffna. With tourism on the rise in Trincomalee, the introduction of additional boating infrastructure and tour/chart offerings aligns with the intention to spread and diversify

the belt's tourism arrivals in the hopes that more yachts and boats will be drawn to the area.

Efforts to support and promote the industry include:

- Boat rental/chartering services
- Additional marinas, ports, jetties, and cruise terminal expansion, increasing the number of boats and yacht arriving to the belt
- Tourism diversification strategy (to spread economic benefits and lessen environmental impact)
- Amenities, services and attractions for luxury minded tourists
- Promotion of the “belt” as a marine tourism destination (in the future)

## Diving and snorkeling

The north eastern coast of Sri Lanka is home to prime diving conditions in terms of water visibility, marine biodiversity and underwater attractions. Besides the area's coral reefs, the shipwrecks lying off the coast of the north eastern coastal belt present the unique opportunity for divers interested in niche diving experiences.

Efforts to support and promote the industry include:

- Facilitate water sports around the lagoon area
- Dive tours (i.e. shipwreck diving) and dive certification opportunities
- Areas to rent equipment
- Promote snorkeling
- Additional marine leisure activities

## Fishing activities/experiences

As the majority of locals participate in the fishing or agricultural sector, there is the opportunity to transform local knowledge into blue tourism products such as through tourism-focused fishing activities. Prawn cultivation and fishing are activities that are indigenous to the area, having traditionally been the main economic activities since the colonial period. Aquaculture is deeply intertwined with the area's cultural heritage, which could attract tourists who are interested in taking part in hands-on fishing activities that are led by local fishermen, especially those who showcase traditional fishing practices that have been passed down to them for generations.

Efforts to support and promote the industry include:

- Basic infrastructure
- Community based tourism fishing experiences
- Training and capacity building for fishermen (to lead tours and fishing tours)
- Development of voluntourism activities (for prawn cultivation and fishing)
- Sport fishing competition to promote the area for fishing tourism
- Tourist information about fishing activities
- Enforcing ban on dynamite fishing

## Eco-tourism

The North-Eastern Coastal Belt's potential for eco-tourism is founded in its potential to offer tourists low-impact activities such as swimming, cycling and trekking. Similar to the destination's appeal for wildlife watching, the belt's natural assets, untouched nature, and acclaimed beaches position the area's potential to scale its water-based tourism activities. By fostering low-impact tourism activities that are deeply integrated into the area's natural environment and landscapes, the belt will be able to adopt a reputation as being an eco-tourism hub.

Efforts to support and promote the industry include:

- Flagship eco-tourism projects (like the Kuchchaveli Integrated Resort project concept<sup>53</sup>)
- Eco-tourism product development & community-based tourism
- Bike and ebike rentals and tourist signage for cycling and trekking paths

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<sup>53</sup> *Tourism Development Project Kuchchaveli – Investment Opportunities – Board of Investment of Sri Lanka.* (n.d.). <https://investsrilanka.com/kuchchaveli-tourism-development-project/>

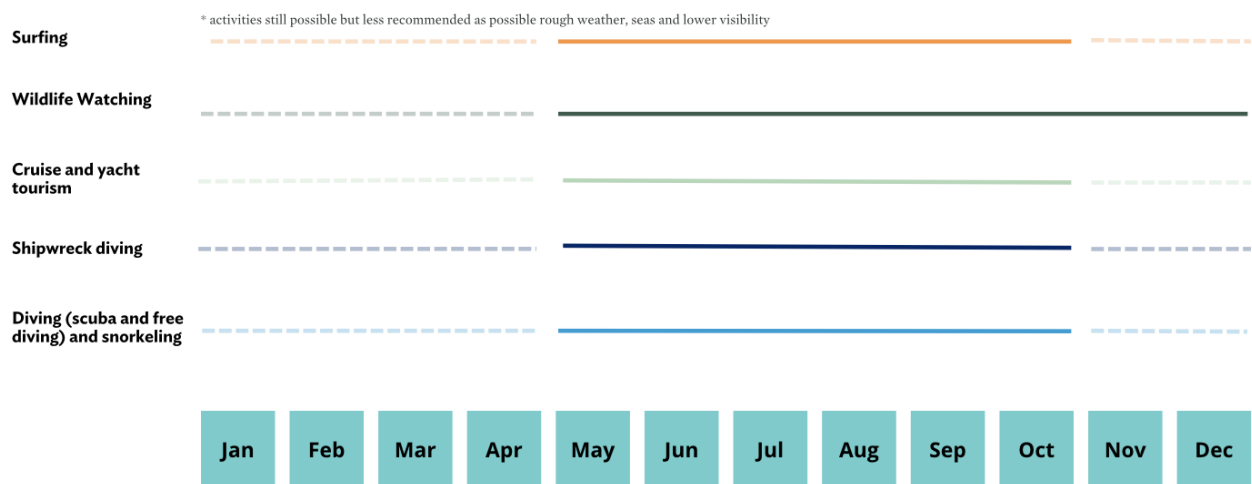


- Training and capacity building for local guides
- Enforced environmental protections

### North-Eastern Coastal Belt's Seasonality

The north eastern coastal belt, with a similar climate to neighbouring Trincomalee, has the potential to become a year-round tourism destination. The belt's high season runs from May to October, with its busiest time falling within the summer months of June-August.

### Seasonality of North-Eastern Coastal Belt's tourism products



### Alternative activities to combat seasonality

- Trips to historical and civil war sites
- Visits to religious sites
- Eco-tourism activities
- Fishing activities

## Summary of North-Eastern Coastal Belt's infrastructure needs per tourism activity

Type of activity	Infrastructure gaps and needs	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife sight-seeing	Ad hoc booking only (for bird watching and boat tours) Tourist signage Local guides	Short-term	Developing tourism around the Kokkilai area (including bird watching activities) Communication (signage) about species found in the area including: cormorants, ducks, egrets, flamingos, herons, ibises, pelicans, and storks Promoting the sanctuaries, lagoons and marine habitats along the coast to Trincomalee	Kokkilai Lagoon, Nanthikadal Lagoon, Chundikulam National Park	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Dark tourism & visits to historical/civil war sites	Signage in areas that are closed off for landmine searching and sensitive military areas on beaches Promotion of museums, sites of interest and historical monuments Local guides	Short-term	Training and capacity building for local guides (to share first person accounts of the conflict) Signage at tourist attractions and sites of interest	Mullaitivu	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Boating/yachting/diving	Ad hoc booking only (for boat tours) Boat rental services Marinas, ports, jetties	Long-term	Strategize pathway into becoming a multi-destination stop between Trincomalee and Jaffna Introducing infrastructure to increase capacity for yachts and multi-day marine vessels	Mullaitivu	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Fishing activities/experiences	Basic infrastructure Fishing community-based tourism products Upskilling for fishermen Enforcing ban on dynamite fishing	Short-term	Tourist promotion for watching/taking part in fishery activities Majority of locals are farmers or fishermen, there is the opportunity to develop this know-how into green and blue tourism products Tourist information on prawn cultivation and fishing as a colonial-era activity	Mullaitivu, Kokkilai, Nayaruru, Nanthikadal and Mathalan Lagoons	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Eco-tourism	Product development Training and capacity building for community members to become guides and join the tourism workforce (as guides or as community-based tourism entrepreneurs)	Medium-term	Landscapes of Kokkilai lagoon, including scrub and open forests, provide eco-tourism potential, Handicraft-making with Palmyra (community-based tourism), Water-based activities and adventure sports, provide the chance to transform the corridor into an eco-tourism hub through increased investment and connectivity Integrating eco-tourism ambitions into Kuchchaveli and Mullaitivu's development, Beach of Kuchchaveli will be developed to the extent that the tourism zone becomes a self-contained village, Additional environmental protections	Kokkilai Lagoon, Mullaitivu and Kuchchaveli	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Diving and snorkeling	Water sports around the lagoon, Need for additional leisure and marine exploration activities, Dive tours and certification courses, Areas to rent equipment	Short-term	Develop shipwreck diving tours Support the development of dive operators Promote snorkeling	Mullaitivu, Kuchchaveli Kokkilai, Nayaruru, Nanthikadal and Mathalan Lagoons	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic

## Development Strategies

### *Short-term*

- Tourism product development. As tourism has yet to be established in “the belt” tourism products and services should be developed around prospective anchor products with support given to tourism operators beginning operations in the area. Existing tourism offerings should be turned into “easy-to-book” tours, with upgrades made to, for example, tourists boats for wildlife watching to meet international standards and improve comfort for guests. (Meeting with tourism operators at Mullaitivu/Trincomalee area)
- Registration with SLTDA. There is a need for more registered accommodations & tourism establishments. (Deliverable 2, Scope 2)
- Developing a tourism identity. A cohesive tourism narrative can be fostered through the upskilling of local guides, who can provide first hand accounts of the conflict and through upgrades to tourism signage. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 3, Scope 2)

### *Medium-term*

- Adding marine tourism infrastructure (for boats and yachts). Stakeholders shared that the lack of marine infrastructure (and anchorages) is hindering not only the growth of the fishing industry, but also causing the tourism industry to miss out on becoming a multi-destination stop since current infrastructure can not accommodate multi-day vessels. Therefore, future plans should establish marine tourism infrastructure in “the belt” to enable future tourism vessels to dock in the area. (Meeting with tourism operators at Mullaitivu/Trincomalee area, Deliverable 1, Scope 2, Deliverable 3, Scope 2)
- Accessibility (transportation and road enhancements), additional transportation options and enhanced road infrastructure are needed for tourism development to progress. Roads are particularly in need of repair and maintenance throughout “the belt”, especially for the roads connecting Kuchachaveli, Mullaitivu and Trincomalee’s beach areas. (Meeting with High level stakeholders in Mullaitivu/Trincomalee area, Deliverable 1, Scope 2, Empirical findings)

### *Long-term*

- Accommodation capacity. In the Mullaitivu district, there are only three guest houses, classified as A and B Grade. The options on Booking.com are also limited, including only two licensed guest houses from this district. Therefore, there is a need to increase the area’s accommodation offerings, including those that offer amenities such as swimming pools, on-site restaurants, bicycle rentals, and airport shuttle services. (Deliverable 2, Scope 2)

## Deliverable 6: Tourism Project Implementation Framework

The research and the previous deliverables have highlighted various social organizations with distinct agendas, interests, and governance dynamics in the marine tourism development process of Sri Lanka. Given this context, collaboration among institutions and the establishment of equitable balance between competing stakeholder interests is a must for ensuring the sustainability of Marine Tourism. More information on existing acts and insights into the complexities around governance are found in “Notes on Ocean Governance”<sup>54</sup>, prepared by the World Bank.

In order to facilitate the sustainable development of Marine Tourism and to drive the implementation of the Marine Tourism Roadmap, the Tourism Project Implementation Framework hinges on a holistic approach to industry development. This approach integrates the application of governance and sustainability principles, and recommends the deployment of targeted Public-Private-Partnerships (PPPs) as the primary strategy for realizing economic resilience through tourism.

### Phase 1

As a first step, a clear context for Marine Tourism Development is established, and emphasizes the need for cooperation, collaboration and balance in the distribution of benefits across competing stakeholder needs. Further, the context adopts a responsible tourism perspective, being crafted with a long-term view, in full support of the national development goals of economic recovery and resilience in Sri Lanka.

### Phase 2

Based on the contextual foundation, the Tourism Project Implementation Framework advocates for a wide-ranging deployment of targeted PPPs, tailored to the specific needs and recommendations advanced within the Marine Tourism Strategic Plan. The framework discusses the diverse applicability of the PPP model, and its suitability for governing all forms of marine tourism partnerships, ranging from the informal cooperation to contractually rigid infrastructural development requiring precise specifications and sizable capital investments.

Notably, there is consensus that the PPP model requires the distinct creation and communication of (a) investment return and (b) direct benefit opportunities, in order to entice private sector participation. In this case, a suite of eight (8) government concessionary instruments were noted as useful, and could be offered in any combination in order to secure effective PPPs with the best suited private sector entities.

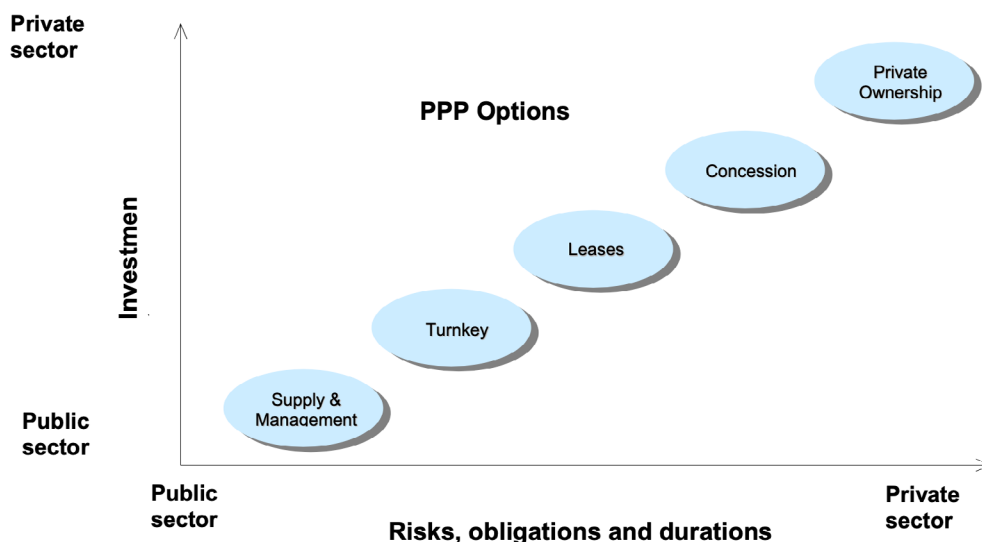
To establish a common language for PPP interpretation, the Framework adapts guidance from the United Nations Economic and Social Commission for Asia and the Pacific (UN-ESCAP)<sup>55</sup>. In particular, UNESCAP’s 2008 online course in PPPs outlines five (5) broad categories/typologies of PPP execution, and such were accepted as relevant in the execution of recommendations emanating from Sri Lanka’s Marine Tourism Strategic Plan.

Moreover, to better understand the flexibility to move between and combine various categories of PPP participation, Figure 1 below maps the five (5) proposed options which offer a basis for the inclusive achievement of local tourism development goals. This diagram demonstrates the gradual progression from Public Sector to Private Sector leadership responsibility, and highlights the critical areas of Investment, Risk, Obligation and Duration. This progression is seen as governments deploy PPP models that move between and offer any combination of elements related to categories 1 – 5.

<sup>54</sup> *Ocean Governance Summaries*. (2021). World Bank. <https://thedocs.worldbank.org/en/doc/2faa3cc2e63a83382d4ef6ca85e83fc4-0320072022/original/Ocean-Governance-Summaries-Booklet-EN-Final-Feb9.pdf>

<sup>55</sup> ESCAP. (n.d.). *E-Learning Series on Public-Private Partnerships*. [https://www.unescap.org/ttdw/ppp/ppp\\_primer/221\\_basic\\_features\\_of\\_ppp\\_models.html](https://www.unescap.org/ttdw/ppp/ppp_primer/221_basic_features_of_ppp_models.html)

Figure 1 - The PPP Model Category Comparisons (UN-ESCAP 2008)



### Phase 3

To demonstrate practical successes in the applicability of well-aligned PPPs to Marine Tourism Development, four (4) best-practice case studies were highlighted. Presented cases were selected for their insights in addressing current challenges being experienced by Sri Lanka, while supporting Tourism Project Implementation via use of selected recommendations from the Marine Tourism Strategic Plan. As such, best practices were focused to showcase possible approaches to (a) stakeholder engagement for destination enhancement, (b) product development through infrastructure creation, and (c) influencer and local expert marketing.

### Phase 4

The last aspect of the Tourism Project Implementation Framework involves the tracking and measurement of Key Performance Indicators (KPIs). KPIs will be measured via the 5 Question (5Q) Success Model, which involves ensuring mandate achievement specific to the Why, What, How, Who, and When, of Marine Tourism development. Importantly, when a desired outcome is not realized, evaluating performance within this model enables continuous improvement and activity refinement in support of effective tourism project implementation.



## Deliverable 7: Marine Tourism Roadmap

The following section underscores a 1-2 year action plan for Kalpitiya, Galle, Trincomalee, Jaffna, Mannar and the north eastern coastal belt. These recommendations include infrastructural developments, activities and promotional efforts that are envisioned to immediately enhance tourist satisfaction, increase the quality of tourism products and services, prevent unsustainable activities and bolster destination competitiveness. The action plan features achievable goals that have the potential to generate an impact on each destination's tourism industry in addition to Sri Lanka's tourism sector.

The investments included in the action plan aim to improve the country's general reputation for tourism health and safety, supporting the competitiveness of the marine tourism industry, water sports and biodiversity. Investment in basic infrastructure, which is the main focus in the Short-term, envisions lifting destinations to being on par with international competitors. Additional mentions about investment in green infrastructure place an emphasis on improving water quality while simultaneously targeting climate and conservation related considerations. Such investments hope to improve conditions for marine tourism activities and tourist satisfaction for marine tourism products, such as diving, while supporting adjacent efforts to conserve marine biodiversity.

### First 1-2 year Action Plan: Kalpitiya

As an initial development, the introduction of hard infrastructure should take precedence to improve the overall tourism experience for the vast majority of tourists who come to Kalpitiya specifically for water-based activities. Therefore, one of the first steps should be introducing bathrooms, changing areas, drinking water, and waste bins (in compliance with CCD guidelines) in areas around the lagoon and other coastal areas frequented by tourists and tourism operators.

Restoration activities should also already begin to take place to revive the Bar Reef as the restoration process can take years to reach fruition. Once plans have been finalized and stakeholders are engaged with the process, activities should begin immediately. Efforts should be supported by enforcement mechanisms to prevent dynamite fishing from happening in the Bar Reef area to prevent progress and restoration efforts from being sabotaged as marine species start to return.

In terms of promotion, shipwreck diving tourism products should be developed into multi-day packages to restore Kalpitiya's reputation as a diving destination. Once Kalpitiya's reputation for diving has been restored, tourists should be encouraged to take part in reef exploration.

Other Short-term priorities are featured in the chart below.

	Kalpitiya
Zonation	<ul style="list-style-type: none"><li>• Protection of the Bar Reef Marine Protected Area</li></ul>
Infrastructure	<ul style="list-style-type: none"><li>• Carrying capacity studies/activity limitations</li><li>• Address immediate infrastructural needs (i.e. water)</li><li>• Improve transparency of infrastructure development authorization Counter-erosion strategies</li><li>• Duty free inclusion of SL made yachts, boats and kitesurfing equipment to support local industry of suppliers and operators</li></ul>
Tourism product	<ul style="list-style-type: none"><li>• Kite surfing, shipwreck diving, tourism packages, wildlife watching linking current tourism products and services</li></ul>

Conservation	<ul style="list-style-type: none"> <li>• Strengthen enforcement of existing regulations to support conservation practices in the fishery and tourism sectors.</li> <li>• Provide support for coral restoration and conservation projects to protect and restore vital coral ecosystems.</li> <li>• Demarcate fishing and tourism activities and suppress illegal fishing activities (dynamite fishing, unsustainable wildlife interactions)</li> <li>• Petrol tax concession</li> </ul>
Investment	<ul style="list-style-type: none"> <li>• Public toilets</li> <li>• Drinking water</li> <li>• Changing areas</li> <li>• Decompression chamber (for tourist/diver reassurance)</li> <li>• Rescue facilities (rescue equipment/first aid kits for tourist health and safety)</li> <li>• Waste bins (for waste collection, to prevent plastic pollution)</li> <li>• Support to combat coastal erosion (for the continuity of coastal tourism establishments)</li> <li>• Drinking water (for tourist use, to reduce the need for plastic bottled water)</li> <li>• Waste bins (for waste collection, to prevent plastic pollution)</li> </ul>

### First 1-2 year Action Plan: Galle

Waste is one of the most significant challenges in the Greater Galle Area. Therefore, immediate efforts should be made to reduce plastic pollution in and around beach areas by adding waste bins and developing a closed-loop waste management process to collect and process waste. Other technological solutions should aim to mitigate waste coming from streams and other bodies of water. Seabins, for example, could be introduced into polluted waterways to reduce the amount of plastic pollution making its way onto the beaches and into the sea. Municipality-led cleanups should also be planned to help ensure that beaches stay clean. Other hard infrastructure including refill stations for potable water should be installed and communicated about to further reduce the amount of plastic water bottles used by tourists, while simultaneously demonstrating the area's commitment to sustainability. Conservation initiatives, in the form of citizen science and voluntourism projects, should also be developed and supported with monetary and technical support, notably, for turtle hatcheries and coral reef restoration organizations.

Other actions such as evaluating the impact of tourism development on existing tourism products (carrying capacity and activity limitation studies) should be prioritized prior to investment and further development. The prospective Galle Port City Development Plan<sup>56</sup> should particularly be reassessed to understand the project's impact on livelihoods, wave patterns, erosion and other effects from moving the shoreline forward from where it currently stands. Other special attention should also be given to preserving surf points and accommodations that are being impacted by erosion and future challenges stemming from climate change.

<sup>56</sup> Greater Galle Development Plan 2019-2030. (2019). UDA District office, Galle. [https://www.uda.gov.lk/attachments/devplan\\_detailed/Development%20Plans%202019-2030/Galle/English.pdf](https://www.uda.gov.lk/attachments/devplan_detailed/Development%20Plans%202019-2030/Galle/English.pdf)



Additional actions are listed in the chart.

	Galle
Zonation	<ul style="list-style-type: none"> <li>• Establish clear demarcations for coastal and marine areas designated for tourism use.</li> <li>• Evaluate the Galle Port City plans to assess their impact on surf tourism and the livelihoods of tourism service providers.</li> <li>• Perform an assessment on (the potential) for erosion caused by sand-filling to understand its impact on the environment.</li> <li>• Formalize informal tourism service providers to regulate and support their activities.</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• Carrying capacity studies/activity limitations</li> <li>• Address immediate infrastructural needs (i.e. bathroom facilities, waste processing (especially for plastic pollution), and drinking water). Establish lifeguard and rescue infrastructure, including a decompression chamber.</li> <li>• Simplify the process of introducing waste infrastructure like trash cans. Clarify and streamline the licensing and authorization process for tourism-related activities.</li> <li>• Implement a permanent anchoring system to facilitate safe marine operations.</li> <li>• Promote the use of green boat alternatives for fishermen to support eco-friendly practices.</li> <li>• Duty free inclusion of SL made yachts, and boats to support local industry of suppliers and operators</li> </ul>
Tourism product	<ul style="list-style-type: none"> <li>• Multi-day shipwreck diving tours</li> <li>• Citizen science projects and voluntourism opportunities in collaboration with a nearby turtle hatchery</li> </ul>
Conservation	<ul style="list-style-type: none"> <li>• Strengthen enforcement against unregulated and illegal tourism activities (i.e. whale diving).</li> <li>• Provide support to turtle conservation projects and organizations.</li> <li>• Initiate local municipality-led cleanups to address environmental issues.</li> <li>• Share knowledge on harmful fishing practices within the fishermen's community.</li> <li>• Launch campaigns to debunk misconceptions about fishermen and plastic pollution.</li> <li>• Petrol tax concession</li> </ul>
Investment	<ul style="list-style-type: none"> <li>• Waste bins (to prevent plastic pollution and for collection)</li> <li>• Sewage/waste processing system (to prevent pollution)</li> <li>• Lifeguards and special jet skis with rescue capabilities (for tourist health and safety)</li> <li>• Decompression chamber (for tourist reassurance)</li> <li>• Permanent anchoring system (to avoid hard caused to coral reefs)</li> <li>• Public toilets (for tourist use)</li> <li>• Drinking water (for tourist use)</li> <li>• Changing areas (for tourist need)</li> <li>• Boat alternatives for fishermen (to reduce their reliance on kerosene and improve water quality)</li> <li>• Buoys (for demarcation)</li> </ul>

## First 1-2 year Action Plan: Trincomalee

In Trincomalee, first and foremost, there is a need for immediate action to eradicate dynamite fishing to alleviate pressure on Trincomalee's reef ecosystems, which are currently at stake of severe and irreversible damage. Without immediate action, Trincomalee could see its entire reef ecosystem devastated, marine species decimated and livelihoods lost. Therefore, additional efforts are needed to control the purchase of dynamite, increase jail fines, adjust penalties and timely convictions for dynamite fishing crimes. There is also a need to expand the capacity to patrol the areas where the practice is taking place. Without doing so, Trincomalee's diving industry will suffer as marine biodiversity declines and tourists are exposed to risks to their health and safety.

Conservation efforts are additionally needed for Trincomalee's whale populations including the introduction of regulations or mechanisms to prevent unsustainable behaviours by tourism operations (i.e. whale diving, chasing and other harmful tactics being employed during whale watches). Based on empirical findings, Trincomalee's whale watching activities are currently unsustainable, with very few operators taking precautionary measures to avoid harassing and crowding; actions which are causing behavioural changes in whale species. As a result, many whale populations are now avoiding the areas they used to frequent. In order to combat these harmful interactions, whales should be given a special designation (as a national asset) to receive additional protection. A code of conduct should simultaneously be developed and implemented and the areas where whales are located should be patrolled and enforced with fines and other penalties given to tour operators who behave in an unsustainable manner.

Similar to Kalpitiya and Galle, basic infrastructure is suggested to be added to select beach areas, supported by tourist signage and other communications contextualized to regulations on Pigeon Island. Materials should aim to enhance the tourism experience by sharing information about species and facilitate sustainable interactions with wildlife and protect the environmental integrity of the beach.

Other infrastructure is also needed at the cruise terminal. This includes an immigration processing centre, rest-rooms and potable water/ water refill stations. Shopping areas should also be added and shopkeepers should be incentivized to sell their goods and produce in the area around the terminal. This will provide tourists with an additional activity to take part in and keep tourism spending in the destination.

Additional points of action are as follows:

	Trincomalee
Zonation	<ul style="list-style-type: none"> <li>Refrain from tourism development outside of the tourism zone</li> <li>Avoid activities causing waste discharge, solid waste, or chemical/fuel spills.</li> <li>Prohibit commercial fish farming</li> <li>Enforce ban on dynamite fishing</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>Carrying capacity studies/activity limitations</li> <li>Basic facilities at Pigeon Island: bathrooms, changing area, drinking water, first aid kits</li> <li>Immigration processing centre at cruise port Environmentally Sensitive Area ESA signage</li> <li>Permanent anchoring area</li> <li>Docking area on Pigeon island</li> <li>Rescue infrastructure</li> <li>Duty free inclusion of SL made yachts and boats to support local industry of suppliers and operators</li> </ul>
Tourism product	<ul style="list-style-type: none"> <li>Diving and snorkeling</li> <li>Boating and wildlife tours</li> <li>Cruise and yacht tourism</li> </ul>

Conservation	<ul style="list-style-type: none"> <li>• Tourist communications signages at Pigeon Island for safety and behaviour around sharks, coral reefs, and marine life.</li> <li>• Enforcement on the dynamite fishing ban (higher fine and jail time)</li> <li>• Strict regulations and control on the purchase of dynamite/explosives</li> <li>• Demarcation buoys diving fishery and tourism activities</li> <li>• Resources and training for CCD/Dept of Wildlife/Coast Guard</li> <li>• Role of Navy in the enforcement of zoning regulations (buoys)</li> <li>• Petrol tax concession</li> </ul>
Investment	<ul style="list-style-type: none"> <li>• Public toilets</li> <li>• (Tourist need)</li> <li>• Drinking water (tourist need)</li> <li>• Changing areas (tourist need)</li> <li>• Waste bins (waste management)</li> <li>• Rescue facilities (rescue equipment/first aid kits for tourist health and safety)</li> <li>• Buoys (for demarcation purposes)</li> <li>• Docking area (to facilitate marine vessels)</li> <li>• Buoys (for demarcation)</li> <li>• ESA signage (for tourist communication and sustainable behaviours)</li> <li>• Petrol Tax Concession (to incentivize formalization)</li> <li>• Permanent anchoring area (to avoid continued damage to seabed and marine biodiversity)</li> <li>• Immigration processing centre</li> </ul>

## First 1-2 year Action Plan: Jaffna

The suggested infrastructural development and investments featured in the chart below aim to enhance Jaffna's existing tourism activities, notably, wildlife sightseeing, visits to tourist attractions and leisure beach activities and promising future activities including boating, niche tours, eco-tourism, and diving.

Considering that Jaffna's most significant economic sectors, fishing and aquaculture, both rely on the health of the marine environment, there is a pressing need to demarcate multi-use areas so that both sectors can operate without conflict. Additional protections and conservation measures have also been recommended specifically for marine tourism activities.

Additional recommendations are found in the table below.

	Jaffna
Zonation	<ul style="list-style-type: none"> <li>• Demarcation buoys at sea cucumber farms</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• Basic infrastructure for beach facilities: public rest-rooms, potable water, changing areas, sunbeds and leisure areas for tourists</li> <li>• Waste collection (trash cans and recycling bins)</li> <li>• Education/awareness campaigns on waste management</li> <li>• Tourist signage (for law enforcement and protections)</li> <li>• Awareness campaigns on the benefits of tourism</li> </ul>
Tourism product	<ul style="list-style-type: none"> <li>• Wildlife sightseeing</li> <li>• Visits to historical/cultural/religious/civil war sites</li> <li>• Leisure activities (sunbathing, swimming, snorkeling)</li> </ul>

Conservation	<ul style="list-style-type: none"> <li>• Protections for marine biodiversity (planning, management and communication strategies)</li> <li>• Conservation measures for lagoons and bird sanctuaries (through special protected status or integrated conservation efforts)</li> </ul>
Investment	<ul style="list-style-type: none"> <li>• Public toilets (tourist need)</li> <li>• Drinking water (tourist need)</li> <li>• Changing areas (tourist need)</li> <li>• Waste bins (waste management)</li> <li>• Tourist signage (tourist need)</li> <li>• Communication materials/messaging on tourism (for community members)</li> <li>• Buoys (for demarcation)</li> <li>• Staff members at KKS (for immigration processing)</li> </ul>

### First 1-2 year Action Plan: Mannar

The main tourism segments visiting Mannar are nature enthusiasts, including those interested in taking part in bird watching and other sightseeing activities in the area's many nature areas. Hence, zonation and conservation recommendations prioritize the preservation of the integrity of the bird migratory routes and areas home to marine and terrestrial ecosystems.

Without significant tourism development to date, Mannar requires basic infrastructure, tourism signage, and additional shopping amenities to increase its appeal as a tourism destination. Promotional efforts are additionally recommended to spread awareness on Mannar's existing tourism activities, especially kitesurfing, which is largely still unknown to tourists who visit the area.

Additional points of action are as follows:

	Mannar
Zonation	<ul style="list-style-type: none"> <li>• Government-led communication campaigns/outreach to the fishery community</li> <li>• Carrying capacity and activity limitation study</li> <li>• Assessment/study to determine vulnerable coastal areas in Mannar</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• Basic infrastructure</li> <li>• Drinking water</li> <li>• Waste collection</li> <li>• Demarcation buoys</li> <li>• Tourist communication</li> <li>• Permission granting process (for access to tourist sites)</li> <li>• Souvenir shops and tourist market</li> </ul>
Tourism product	<ul style="list-style-type: none"> <li>• Wildlife sightseeing/eco-tourism</li> <li>• Visits to historical, cultural and religious sites</li> <li>• Kitesurfing/windsurfing</li> </ul>
Conservation	<ul style="list-style-type: none"> <li>• Eradication of dynamite fishing and other illegal fishing practices including bottom trawling</li> <li>• Additional protections for marine biodiversity</li> <li>• Protections for archaeological, cultural and historical sites pertaining to maritime heritage</li> </ul>

Investment	<ul style="list-style-type: none"> <li>• Public toilets (tourist need)</li> <li>• Drinking water (tourist need)</li> <li>• Changing areas (tourist need)</li> <li>• Waste bins (waste management)</li> <li>• Demarcation buoys</li> <li>• Development of online permitting system (for site access)</li> <li>• Souvenir shops and tourist market (hard infrastructure and SME support)</li> <li>• Promotion of existing activities (also raising awareness on kitesurfing)</li> </ul>
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## First 1-2 year Action Plan: North-Eastern Coastal Belt

Home to a small-scale tourism industry, recommendations for the north eastern coastal belt aspire to make use of the area's existing historical, cultural and natural assets. Similar to the other target destinations in the Northern Province, the "belt" is suggested to take measures to protect its marine and coastal assets through precautionary measures, assessments, stronger regulatory enforcement against dynamite fishing and by leveraging tourism signage to avoid harm from being caused to marine ecosystems and coral reefs.

Recommendations for tourist infrastructure are primarily centred around introducing basic infrastructure and adding areas for shopping and tourist information. Other investments aim to benefit the local community by engaging them in training and capacity building for tour guiding, environmental maintenance and community-based tourism. A full list is included in the table below.

	North eastern coastal belt
Zonation	<ul style="list-style-type: none"> <li>• Carrying capacity and activity limitation studies</li> <li>• Precautionary measures (Environmental Impact Assessments and other assessments and evaluation tools) for ESAs</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• Basic infrastructure (and evaluation of existing facilities for waste bins and rest-rooms)</li> <li>• Waste bins and management processes</li> <li>• Shopping area/kiosks</li> <li>• Tourism information and signage</li> <li>• Tourist visitor centres</li> </ul>
Tourism product	<ul style="list-style-type: none"> <li>• Wildlife watching</li> <li>• Visits to historical and civil war sites</li> <li>• Fishing (community-based tourism)</li> <li>• Eco-tourism</li> </ul>
Conservation	<ul style="list-style-type: none"> <li>• Eradicating dynamite fishing</li> <li>• Training and capacity building for integrated livelihoods (that uphold the values of conservation and sustainability) enabling community-based tourism activities and the development of a workforce of local guides</li> </ul>
Investment	<ul style="list-style-type: none"> <li>• Basic infrastructure (and stock taking of quality and quantities of existing facilities for rest-rooms, waste bins and potable water)</li> <li>• Shopping area (tourist and community need)</li> <li>• Kiosks (tourist need)</li> <li>• Tourism information and signage (tourist need)</li> <li>• Tourist visitor centres (tourist need)</li> <li>• Training and capacity building (community need)</li> </ul>

The following section underlines the infrastructure and conservation needs, gaps, time line, strategy and other recommendations for each of the target destinations' tourism activities. Two charts have been provided for each destination: one for a tourism activity strategy and a second for specifications around infrastructural and governance for tourism value creation.

Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended locations	Presently Existing	Promotional recommendations
Kite surfing (Primary)	Kalpitiya is not easily accessible Needs institutional and legislative support Entrepreneurship development Tax waiver on Sri Lankan-made kitesurfing equipment (to make equipment available for purchase in SL not imported from the EU)	Mangrove management (to prevent changes to wind patterns)  Mangrove and seagrass planting as a climate-friendly nature based solution absorbing carbon and mitigating the impacts of erosion and sea level rise.  Waste prevention	Access to basic facilities (rest-rooms, changing areas... etc.)  Promotional efforts and events such as international competitions	VAT waiver on equipment (which will facilitate scalability)	Short-term	Capacity building for local instructors Mangrove planting and maintenance initiatives (to prevent overgrowth and ensure stable conditions)	Kudawa Beach, Blue Lagoon	Yes	International Competitions, magazines, promotional campaigns
Diving/ Free diving/ Snorkeling/ Shipwreck diving (Secondary)	Conservation efforts for Bar Reef Decompression chambers Rescue kits Changing areas Diving equipment Facilities to certify divers	Support for coral restoration and conservation projects for reefs that were damaged as a result of dynamite fishing and/or climate-change induced bleaching	Shipwreck diving product creation  Promotion of Kalpitiya as a diving destination	Diving competitions	Short/ Medium-term	Facilitate conservation and coral restoration projects Supply hard infrastructure Waste processing (to maintain water quality)	Kudawa Beach, Blue Lagoon	Diving/ Snorkelling- Yes Shipwreck diving- minimal	Magazines, promotional campaigns via scientific community i.e.. National Geographic

Boat tours/ Wildlife sightseeing (Secondary)	Tourism pier and jetty Whale watching boats (two level, like those used primarily in Mirissa) Awareness on marine wildlife	Whale and dolphin conservation efforts (and maximums around the number of boats permitted)  Tourist communications (verbal from tourism operators and in the form of signage, sharing information about the species and conservation efforts)	International standard level whale watching boats (similar to the two decker ones used in Mirissa)  Area for docking boats	Custom tours to the surrounding islands	Short/ Medium-term	Install hard infrastructure Studies/ monitoring of impact of tourism on whales  Move unused whale watching boats from Mirissa to Kalpitiya  Tourism communication (and training and capacity building on wildlife interactions and behavioural patterns)	Kudawa Beach, Blue Lagoon	Yes	Magazines, promotional campaigns via scientific community i.e. National Geographic
Niche voluntourism experiences (Tertiary)	Community engagement and facilitation Support/capacity building for the promotion of voluntourism activities	Planning and modeling to understand the impact of mangrove planting including the amount of CO2 mangroves will absorb and the ways the project will improve water quality  Identification of where voluntourism projects could make an impact and the activities that could support efforts	Promotion support of existing voluntourism activities to stimulate competitiveness	Support for grassroots voluntourism projects and existing projects looking to scale	Short-term	Mangrove planting initiatives Coral restoration projects  Enabling entrepreneurship  Community- based tourism development	Kudawa Beach, Blue Lagoon	No/some private stakeholder run efforts	Magazines,promotional campaigns via scientific community i.e.. National Geographic , Partnering with local and international NGOs and universities
Tour packages (Secondary)	Development of tourism itineraries linking activities cross promotion with accommodations	Understanding activity limitations as to avoid over tourism and its impacts on marine biodiversity  Considering the carbon footprint of itineraries, prioritizing green energy transport alternatives, sustainable accommodations...etc.	Support for tourism operators to identify and link activities into packages that appeal to different tourist segments	Facilitating communication and collaboration between tourism operators and accommodations	Short-term	Collaboration with tourism operators Shipwreck diving themed packages Accommodations promote packages	Kudawa Beach, Blue Lagoon	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)



Resort-based activities (Tertiary)	Accessibility by boat from mainland to reach island resort(s)  Activity diversification	Environmental impact assessment, eco-tourism activity development and ideally carbon footprinting and wider sustainability strategy for any future resort projects	Facilitate development to move forward (unknown what stage it is in)	Catalogue tourism activities (either internally or through outsourced consultancy) based on trends and tourist demand to then hand over to the tourism operator.	Long-term	Hard infrastructure investment Half day activities (yoga, wellness, cultural events, shopping...etc..)	Kudawa Beach, Blue Lagoon	No	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
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## Kalpitiya: Actions, Needs and Aims - Summary

	Conservation & Safeguarding	Diversity & Spread	Tourism System Value Creation
Physical Resources and Infrastructure	<ul style="list-style-type: none"> <li>• Beautification for the lagoon area (including mangrove planting and upkeep) that prioritize stable and advantageous wind conditions for kitesurfing</li> <li>• Beach stabilization to prevent coastal erosion</li> </ul>	<ul style="list-style-type: none"> <li>• Strategically place buoys in ocean and harbour areas to demarcate fishing and tourism activities</li> <li>• Climate-smart renewable energy technology (energy generators to lower costs for accommodations, promote resilience, support sustainable tourism)</li> <li>• Public spaces/hubs (can be multi-purpose spaces for both tourist and local use such as parks, public squares, shopping area)</li> <li>• Road enhancement (to benefit tourist and local use, and enhance accessibility)</li> </ul>	<ul style="list-style-type: none"> <li>• Basic tourism facilities (rest-rooms, changing areas, potable water)</li> <li>• Whale watching boats (that meet international standards)</li> <li>• Tourism pier and jetty</li> <li>• Extend and improve the current pier infrastructure</li> <li>• Shipwreck diving infrastructure</li> <li>• Decompression chamber</li> <li>• Rescue facilities (rescue equipment/first aid kits)</li> <li>• Waste bins</li> <li>• Luxury resorts</li> <li>• Campsite</li> <li>• Additional dive sites</li> <li>• Develop the surrounding islands (resorts and additional accommodations, multi-day tours, activities, and eco-tourism experiences)</li> </ul>
Governance, management and organization	<ul style="list-style-type: none"> <li>• Protection of the Bar Reef Marine Protected Area (and others through coral restoration and conservation projects)</li> <li>• Calculate carrying capacity/activity limitation</li> <li>• Tourism activity diversification (i.e., making diving competitive) requires preserving water quality, coastal biodiversity, and inland ecosystems</li> <li>• Strengthen enforcement of existing regulations to support conservation practices in the fishery and tourism sectors</li> <li>• Support scientific data collection and technological innovation to enhance monitoring and evaluation of tourism impact on coastal and island ecosystems</li> <li>• Establish environmental indicators to measure the health of the marine environment to support the implementation of legislation and policies</li> <li>• Waste management process</li> <li>• Ecological restoration programs, wildlife management strategies, beach cleanup efforts</li> </ul>	<ul style="list-style-type: none"> <li>• Address sustainability knowledge gaps within fishing communities</li> <li>• Advertise wildlife-watching tours conducted by local fishermen</li> <li>• Vocational training schools/programs (to upskill the community)</li> <li>• Facilitate access to kitesurfing and surfing for locals</li> <li>• Highlight online the sustainability efforts that have been made by kitesurfing providers</li> <li>• Invite influential surfers to Kalpitiya and have them teach the sport to locals</li> <li>• Promote Kalpitiya as an ideal destination for surfers (host competitions)</li> <li>• Host training camps for professional surfers and kite surfers</li> <li>• Invite influencers and bloggers to Kalpitiya</li> <li>• Integrate diving with fishing tours</li> <li>• Target marine biologists to conduct research on the marine ecosystems</li> </ul>	<ul style="list-style-type: none"> <li>• Certification (i.e. Blue Flag, for promotional purposes)</li> <li>• Offer diving certification programs</li> <li>• Promote coral framing programs to create additional shipwrecks and diving experiences (at tourist centres)</li> <li>• Yachting/ Sailing/ Boating regulations (to prevent overburdening carrying capacity)</li> <li>• Shipwreck diving protections</li> <li>• Duty-free inclusion of Sri Lankan-made kitesurfing equipment</li> <li>• Have international yacht associations and yacht clubs to advertise Kalpitiya</li> <li>• Promote the area's high probability of witnessing dolphins and other marine mammals</li> <li>• Establish a clear licensing procedure for tourism service providers</li> <li>• Revise current port access regulations</li> <li>• Private on-water yacht events and wellness activities</li> </ul>

## Galle (and Greater Galle area)

Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended Locations	Presently Existing	Promotional recommendations
Diving/ free diving/ snorkeling/ shipwreck diving (Primary)	Underwater dive sites Decompression chambers Permanent anchoring systems Rescue kits Changing areas Diving equipment Facilities to certify divers	Coral restoration/ planting projects Assessment on the condition of shipwrecks and maintenance needs	Improved dive boats (that are up to international standards) Additional dive sites Healthy reefs (with thriving and unique marine biodiversity) Shipwrecks (i.e. additional artificial wrecks)	Facilities to certify more local divers (to diversify diving workforce and give locals job opportunities)	Short-term	Hard infrastructure Investment Waste processing (to maintain water quality)	Hikkaduwa, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Diving/ Snorkelling- Yes Shipwreck diving- minimal	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Surfing (Primary)	Basic beach infrastructure Livelihood preservation Sector formalization	Re-assessment of Galle Port City development plans Assessment and modeling on changing wave patterns (due to development) Surf point conservation	Basic infrastructure Formal sector instructors (with experience and qualifications to ensure tourist health and safety) Job skill trainings for surf service providers to diversify their skill- sets	Support sector formalization with incentives and benefits Support surf tourism providers with alternative job opportunities if surf point is compromised by the development plans	Short-term	Preservation of the surf point Transparent permitting and licensing process	Hikkaduwa, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Yes	International Competitions, magazines, promotional campaigns
Boat tours/ Wildlife sightseeing (Secondary)	Cruise terminal/ jetty for docking Studies/ monitoring of impact of tourism on whales	Enforcement and development of code of conduct for wildlife sightseeing tours	Encourage tourism operators to move unused boats to Kalpitiya (which is much less saturated than Mirissa) Make conservation fees more transparent, re-invest fees in the area	Raise the standards of operational whale watching boats (so that tourists see sustainable interactions with wildlife)	Medium/ Long-term	Hard infrastructure Investment Scientific studies	Mirissa Harbour	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic

Leisure beach activities (Primary)	Tourist information centre Sun beds	Creation and tourism signage (also to stimulate sustainable behaviour on the beach i.e. throwing away trash)	Create a website with tourist information with all of the area's main attractions (for a comprehensive list of activities and sites of interest)	Share tourist information at other attractions in Galle (city)  Enhance collaboration amongst tourism service providers and accommodations for cross-promotion	Short/ Medium-term	Hard infrastructure	Hikkaduwa, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Niche voluntourism/ citizen science activities (Tertiary)	Support/capacity building for the promotion of voluntourism activities	Identification of where voluntourism projects could be used for wider climate change mitigation and adaptation	Financial and technical support to raise standards at conservation facilities and scale impact  Coordination between conservation organizations and universities and other institutes to create a steady stream of interns and high impact volunteers	Tourism promotion  Events or local/ international TV spots featuring initiatives	Short/ Medium-term	Internship program development  Turtle hatchery voluntourism projects	Hikkaduwa, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic, Partnering with local and international NGOs and universities
Maritime heritage sites (Primary)	Tourism products that integrate maritime heritage	Assessment on the maritime heritage sites in need of monetary and technical support for conservation purposes.	Signage that strengthens ties to maritime heritage  Create a maritime heritage trail	Promotional tourism campaigns highlighting Galle's maritime heritage and offerings	Short-term	Development of tourism itineraries linking Galle Fort, maritime museums and other marine heritage sites of interest to diving tourism	Hikkaduwa, Unawatuna, Weligama, Secret Beach, Mirissa Beach, Dickwella, Hiriketiya, Silent Beach, Tangalle, Mawella Beach	No	Magazines, promotional campaigns via scientific community i.e.. National Geographic, Partnering with local and international NGOs and universities
Yacht/cruise tourism (Primary)	Cruise terminals Custom events for special occasions  Environmental protections	Carrying capacity and activity limitation study to inform development plans	Berthing facilities  Waste infrastructure to reduce pollution in water and around docking areas	Promotion of Galle being a yachting destination	Long-term	Hard infrastructure Yacht/ catamaran charter and event hosting targeted towards luxury tourists Going plastic free/ using waste infrastructure	Galle harbour	Minimal	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

## Galle: Actions, Needs and Aims - Summary

	Conservation & Safeguarding	Diversity & Spread	Tourism System Value Creation
<ul style="list-style-type: none"> <li>Physical Resources and Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Demarcations for coastal and marine areas to be designated for tourism use</li> <li>Buoys (for demarcation)</li> <li>Technical support for coral revival planting projects</li> <li>Permanent anchoring system</li> </ul>	<ul style="list-style-type: none"> <li>Boat alternatives for fishermen (that are eco friendly, i.e. electric boats)</li> <li>Separate docking area for tourism vessels (to avoid conflict with the fishing community)</li> </ul>	<ul style="list-style-type: none"> <li>Eco-tourism development, (infrastructure and accommodations)</li> <li>Basic tourism facilities (rest-rooms, changing areas, potable water)</li> <li>Artificial dive sites</li> <li>Tourist information centre</li> <li>Public sunbeds</li> <li>Lifeguards and special jet skis with rescue capabilities</li> <li>Decompression chamber</li> <li>Shipwreck diving infrastructure</li> <li>Waste bins</li> <li>Tourism pier and jetty, Harbour space/ jetty (for docking)</li> <li>Cruise terminals (Galle and Mirissa harbour)</li> <li>Lifeguard and rescue infrastructure</li> <li>Weather-proof shelters on the beach</li> <li>Increase the availability of rentable boats</li> </ul>
<ul style="list-style-type: none"> <li>Governance, management and organization</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate the Galle Port City plans</li> <li>Perform an assessment of erosion caused by sand-filling</li> <li>Disaster Risk Management plan</li> <li>Carrying capacity and activity limitation study</li> <li>Tech-based solutions using GIS modeling</li> <li>Sea bin or bubble barrier technology (to catch waste in waterways)</li> <li>Support (monetary and technical) to turtle conservation projects</li> <li>Initiate local municipality-led cleanups</li> <li>Whale conservation efforts by the wildlife department</li> <li>Sewage/waste processing and management</li> </ul>	<ul style="list-style-type: none"> <li>Implement urban planning strategies to disperse tourists</li> <li>Develop Smart Growth Centres</li> <li>Strengthen port infrastructure with the Galle Port Development Project (GPDP)</li> <li>Share knowledge on harmful fishing practices within the fishing community</li> <li>Launch campaigns and counter-narratives to dispel misconceptions about fishermen</li> <li>Promote the use of green boat alternatives</li> <li>Develop citizen science projects and volunteerism opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Formalize informal tourism service providers to regulate the sector</li> <li>Strengthen enforcement against unregulated and illegal tourism activities</li> <li>Certification (i.e.. Blue Flag)</li> <li>Yachting/ Sailing/ Boating regulations (to prevent over-tourism)</li> <li>Simplify the process of introducing waste infrastructure</li> <li>Clarify and streamline the licensing and authorization process for tourism-related activities</li> <li>Duty-free inclusion of Sri Lankan-made equipment</li> <li>Tax waiver on imported marine vessels (boats and yachts)</li> <li>Integrate cultural heritage tours with boating tour packages</li> <li>Leverage UNESCO World Heritage site status</li> <li>Promote the upcoming underwater art gallery</li> <li>Leverage Galle's reputation to promote yacht tourism and chartering</li> </ul>

# Trincomalee

Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Diving/free diving/ Snorkeling/ Shipwreck diving (Primary)	Rescue kits Eco-friendly boats (moving away from kerosene)  Changing areas Bathroom facilities  Additional dive sites (shipwrecks and trains)  Shipwreck diving tour itineraries	Enforcing dynamite fishing ban  ESA signage  Coral reef restoration	More diving sites  Unique diving sites like underwater trains	Training for fishing community (to also become guides/use skills for alternative livelihoods and income diversification)	Short-term	Enforcement of dynamite fishing ban (stricter punishment)  Waste processing (to avoid pollution and higher fees for dumping waste at the harbour)  Tourist communication on Pigeon Island (about proper behaviour around marine species)	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Diving/ Snorkelling- Yes Shipwreck diving-minimal	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Boat tours/ Wildlife sightseeing (Primary)	Whale watching boats (two level)  Marina infrastructure for yachts and boats Floating jetty	Enforcement and development of code of conduct for wildlife sightseeing tours	Safety and sustainability standards for whale watching  Training for tourism operators (to operate sustainably)	Enforcement (from Navy) to patrol areas where whale watching activities are taking place) to penalize tourism operators that do no comply with regulations and code of conduct	Short/ Medium-term	Navy support for whale watching management/ providing tours to tourists  Capacity for additional catamaran and yacht tours	Trincomalee Harbour, Trincomalee town beach, Coral Cove Beach, Marble Beach	Yes	Magazines,promotional campaigns via scientific community i.e.. National Geographic
Cruise tourism (Primary)	Half day activities (incl. Shopping and other experiences located by where cruise ships are docked)  Immigration processing centre	Waste process and re-evaluation of fees for trash letting in  Trincomalee harbour	Create more tourism products and services for arrivals in the immediate area  Add basic infrastructure (for restrooms... etc.)	Shopping opportunities  Additional amenities and facilities (restaurants... etc...)	Long-term	Carrying capacity study and environmental impact assessment on cruise terminal expansion Hard infrastructure	Trincomalee Harbour	Minimal	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
Water bungalows (Tertiary)	Approval of projects/ investment	Environmental impact assessment and sustainability strategy that assesses the carbon footprint of development to prioritize climate-friendly development	Streamline approval process for water bungalows (including designation for responsibilities per stakeholder)	Increase investment readiness of the area	Long-term	Tourism product development and promotion strategy  Hard infrastructure	TBD.	No	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

Yacht/cruise tourism (Secondary)	Cruise terminals Tourism product diversification Environmental protections	Permanent anchoring system, environmental impact assessment on yacht/cruise infrastructure and development		Long-term	Hard infrastructure Yacht/ catamaran charter and event hosting targeted towards luxury tourists  Going plastic free/using waste infrastructure	Trincomalee Harbour, Trincomalee Town Beach	Minimal	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
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## Trincomalee: Actions, Needs and Aims - Summary

	Conservation & Safeguarding	Diversity & Spread	Tourism System Value Creation
<ul style="list-style-type: none"> <li>Physical Resources and Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>Environmentally sensitive area communications (signage)</li> <li>Permanent anchoring area</li> <li>Waste processing centre</li> </ul>	<ul style="list-style-type: none"> <li>Demarcation buoys in shared coastal and harbour areas</li> <li>Eco-friendly boats (that run on green energy to reduce kerosene pollution)</li> </ul>	<ul style="list-style-type: none"> <li>Tourists communications at Pigeon Island</li> <li>Docking area on Pigeon island</li> <li>Basic tourism facilities (rest-rooms, changing areas, potable water)</li> <li>Water bungalow development</li> <li>Underwater museum</li> <li>Waste bins</li> <li>Rescue facilities</li> <li>Shipwreck diving infrastructure</li> <li>Docking area (to facilitate marine vessels)</li> <li>Marina</li> <li>Water refill station</li> <li>Pier/floating jetty</li> <li>Immigration processing centre</li> <li>Cruise terminal expansion</li> <li>Diving boats that meet international standards</li> <li>Sinking different types of vessels or trains</li> </ul>
<ul style="list-style-type: none"> <li>Governance, management and organization</li> </ul>	<ul style="list-style-type: none"> <li>Prevent activities that discharge wastewater/drainage into waterways including at the Trincomalee cruise port</li> <li>Enforce a ban on dynamite fishing and strict regulations and control on the purchase of dynamite/explosives</li> <li>Monitoring and evaluation process in place to track marine assets' health</li> <li>Carrying capacity studies and Environmental Impact Assessment on cruise port and prospective expansion</li> <li>Waste management plan</li> <li>Coral planting activities</li> <li>Fees that are collected from whale watching should generate funds dedicated to marine protection</li> </ul>	<ul style="list-style-type: none"> <li>Refrain from tourism development outside the tourism zone</li> <li>Capacity building, resources and training for CCD/Dept of Wildlife/Coast Guard to combat dynamite fishing</li> <li>Enforcement of regulations, creation of and communications about a code of conduct.</li> <li>Encourage surf operators/instructors to provide surfing lessons to local children to build an affinity for the ocean and organize beach cleanups and other conservation initiatives for local and tourists</li> <li>Promotion of Trincomalee as a year-round destination.</li> </ul>	<ul style="list-style-type: none"> <li>Certification (i.e. Blue Flag)</li> <li>Petrol Tax Concession (to incentivize formalization)</li> <li>Yachting/ Sailing/ Boating regulations (to combat over-tourism)</li> <li>VAT waiver on imported marine vessels (boats and yachts)</li> <li>Additional activities in proximity to the port</li> <li>Small-group tour development</li> <li>Utilizing social media and assistance from tourist boards to promote the area's numerous shipwrecks</li> <li>Emphasizing the safety and security of the harbour during the monsoon season</li> <li>Continue promoting the area as a surf destination</li> <li>Quality control measures are needed to ensure the safety, maintenance of and overall competitiveness</li> <li>Incentivized sectoral formalization process</li> </ul>



Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife watching (Primary)	Bird watching tours (ready-to-book) Tour guides (with specialized expertise) Additional protections for mangrove forests, lagoons and seasonal marshes Signage to prevent harm to coastal assets	Protections for marine biodiversity, including for the lagoon and bird sanctuaries Facilitating community participation in conservation activities	Tourist information and signage on bird species Ability to book individual and package tours (on demand)	Upskilling local guides Developing tours Creating and disseminating tourist information	Short-term	Preserving the unique biodiversity of the wetlands and important bird migratory areas Promotion of bird species found in Jaffna (flamingos, ducks, gulls, terns, and other shorebirds)  Developing eco-tourism bird watching tours as a means of preserving the lagoon while generating income for locals	Jaffna Lagoon, Chundikulam National Park	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Visits to historical, cultural and religious sites (Primary)	Signage for historical sites Tour guides (to enhance storytelling around Jaffna's historical significance)  Renovation projects (to ensure structural integrity)	Marine heritage conservation Renovation (where needed)	Tourist information/signage Ability to book a local guide	Upskilling local guides Training of tour guides and development of maritime heritage tours  Developing and promoting new museums and lesser known sites  Creating and disseminating tourist information	Short-term	Using Jaffna Port Museum (for maritime heritage promotion)  Tour development for those interested in Jaffna's culture and significance in the civil war  Expanding accommodation capacity to meet the demand and high volumes of tourists who come to visit historical and cultural sites and visits during the festival season	Jaffna (town)	Yes	Magazines, promotional campaigns via the scientific community i.e.. National Geographic,  Partnering with local and international NGOs and universities
Leisure activities (Primary)	Basic infrastructure (Public toilets, changing rooms, showers, and sunbeds)  Drinking water Waste bins	Protections for beaches (and coastal ecosystems)  Waste and pollution prevention	Basic infrastructure Sunbeds Areas for equipment rentals	Promoting beach destinations Adding sunbeds Adding kiosks for equipment rentals	Short-term	Kiosks at Palai airport (providing tourist information)  Addition of semi-permanent structures (floating structures)	Casuarina Beach, Jaffna Lagoon, Charty Beach, Karainagar Beach	Yes	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB, WTM etc.)

Diving and snorkeling (Secondary)	Basic infrastructure Waste bins/waste processing  Drinking water  Decompression chamber  Permissions for marine activities (streamlined process)	Eradicating dynamite fishing  Reef conservation for reefs located offshore of Jaffna's surrounding islands	Basic infrastructure  Dive operators  Dive tours  Decompression chamber	Areas to rent dive/snorkeling equipment  Support the establishment of dive operator(s)  Shipwreck diving tours	Short-term	Additional dive tourism operators and dive boat rental agencies Streamlined permission process for diving Conservation for reefs (enforcement of regulations against dynamite fishing)	Casuarina Beach, Jaffna Lagoon	Minimal/ No	Magazines,promotional campaigns via scientific community i.e.. National Geographic, Kiosks at Palai airport (providing tourist information)
Boating, yachting and cruising (Secondary)	Upgrades and additional marinas, jetties and tourism amenities in Jaffna  Boat infrastructure (for transportation and tours to surrounding islands) including high speed boats that meet international standards  Increased capacity for international arrivals (at immigration processing area)  Jetty for docking (or expansion of current jetty) on Delft Island	Mitigating pollution and environmental impact coming from boats (kerosene pollution, waste discharge...etc.)	Marina/jetty infrastructure for docking  High speed/high quality boats for travel to and between Jaffna's offshore islands  Additional multi-destination boating options leaving from Jaffna (to offshore island and other destinations along the Northern Province)	Supporting yacht chartering businesses (through VAT concessions and improved boat registration process)  Developing tourism in the offshore islands and developing inter-island boat tours  Expansion project at KKS (increasing capacity for international arrivals)	Medium-term/ Long-term	Expansion of Sail Lanka in Jaffna  with chartering offerings to surrounding islands  Promotion of Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu  Re-visit permissions for private boats Tourism workforce training and capacity building (for hospitality training and boat building)  Enabling island hopping	KKS, Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu	Yes, yachting and cruising-no	Magazines,promotional campaigns via scientific community i.e.. National Geographic, Kiosks at Palai airport (providing tourist information)

Eco-tourism, Voluntourism & Aquaculture Activities (Tertiary)	Tourist signage (for law enforcement and beach regulations and codes of conduct)  Development of activities Training and capacity building for instructors, guides...etc...	Mitigating unsustainable behaviours  Avoiding conflict between aquaculture and fishery sector	Need to create activities  Develop aquaculture-based industries and integrated tourist activities (i.e. sea cucumber farming)  Promotion of activities (once active)	Support to upskill local community to lead tourism experiences  Promote activities to tourists during the off season (to mitigate seasonality)  Establish research and information centres on Delft Island  Facilitate cross-cultural voluntourism activities between tourists and fishermen (to alleviate conflict)	Medium-term	Developing Delft Island into eco-tourism destination (and activities, beach-side barbecues, fishing, boat tours)  Establish a research centre and information centre at Delft Island Promotion of hiking and bicycling trails  Development of Palmyra handicraft activities  Create voluntourism activities at sea cucumber farms and to support seaweed harvesting	Jaffna (town), Delft Island and islands of Eluvaitivu, Analaitivu, Nainativu	No	Magazines,promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
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Jaffna: Actions, Needs and Aims - Summary

	Conservation & Safeguarding		Diversity & Spread	Tourism System Value Creation	
• Physical Resources and Infrastructure	• Waste infrastructure • Erosion support • Demarcation buoys at sea cucumber farms		• Community and tourism multi-purpose infrastructure • Public transport for accessibility	• Marine tourism infrastructure (Marina, jetties and tourism amenities) • Boat infrastructure • Hotel and resort capacity • Kiosks at Palai Airport • Decompression chamber	
• Governance, management and organization	• Protections for marine biodiversity • Conservation measures for lagoons and bird sanctuaries • Awareness raising/training for fishing communities • Community-participation through a participatory approach • Assessment on the vulnerability of Jaffna's low lying areas • Disaster risk strategy for Jaffna		• Training and capacity building for livelihood creation • Awareness campaigns on the benefits of tourism (aimed at community members)	• Tourism promotion • Development of a tourism zone • Carrying capacity and activity limitation study • Eco-tourism development	

Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife sightseeing/eco-tourism (Primary)	Basic infrastructure Guides and ready-to-book tour offerings  Communication about wildlife found in the area	Eradication of dynamite fishing and other illegal fishing practices including bottom trawling  Activity limitation study (to prevent environmental consequences from tourism activities)  Enhanced protections for marine and terrestrial wildlife, incl. a tourism code of conduct	Tourist information about species  Awareness on Mannar's sightseeing opportunities  Ability to book tours/private guides  Mapping of current eco-tourism offering (determine where support is needed)	Tourism promotional campaigns  Development of tours  Upskilling tour guides  Online booking platform for visits to attractions/nature parks	Short-term	Development of bird watching (as the area's "mascot" anchor product Promotion (and nature walks/ walkways) Capacity building for local guides Tourist signage Conservation of the quality of the area's water and soil and ecosystems Eco-tourism development in the Environment and Tourism Zone 6)  Development of low impact activities (i.e. canoeing)	Mannar Bird Sanctuary (Vankalai Lagoon), Yoda Weda Sanctuary	Yes	Magazines, promotional campaigns via scientific community i.e.. National Geographic
Visits to historical, cultural and religious sites (Primary)	Signage (at tourist sites)  Cohesive narrative about Mannar's maritime heritage (using branding to re-enforce this narrative)	Protections for archaeological, cultural and historical sites pertaining to maritime heritage	Tourist signage at sites  Supporting infrastructure (tourism information centres)  Heritage tours/diving experiences	Developing a cohesive narrative on Mannar's marine heritage (destination branding)  Creation of maritime museums or special exhibits on Mannar's maritime heritage	Short-term	Communication about protected areas (including those closed to the public i.e. Adam's Bridge, to demonstrate conservation efforts)	Talaimannar Lighthouse, Mannar Fort, Thiruketheeswaram temple	Yes	Magazines, promotional campaigns via tourism community i.e.. Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)

Windsurfing/ kitesurfing (Secondary)	Basic infrastructure at beaches Equipment  Promotion/awareness about kitesurfing activities (rentals and lessons) to meet existing demand	Preventing any impacts from kitesurfing on marine life and coastal ecosystems  Activity limitation study on the impacts of kite surfing on the marine environment and surrounding marine and coastal biodiversity	Tourism operators that offer kitesurfing instruction  Basic infrastructure  Equipment rentals	Promotion of kitesurfing  Expanding capacity for kitesurfing activities  Add areas for equipment rentals	Short-term	VAT incentive for Sri Lankan-made products Support to scale activity (run by operators, hotels and resorts)  Promotion as an anchor product	Keeri Beach, Gulf of Mannar, Vankalai Lagoon	Yes, minimal	International Competitions, magazines, promotional campaigns
Diving/ snorkeling (Secondary)	Basic infrastructure at beaches  Dive centre Sites for diving are off-limits  Tourism operators  Areas to rent equipment	Protections around marine ecosystems prohibit these activities  Eradicating dynamite fishing	Equipment rentals  Tourism operators offering these activities  Dive tours	Streamlining permissions for water-based activities  Designating area for water-based activities  Branding promoting Mannar's peal diving history (as part of a wider narrative)	Medium-term	VAT concession for equipment Streamlined permission granting process Re-visiting diving/snorkeling as permitted activities  Navy re-assurance campaign Reef conservation (eradicating dynamite fishing)  Performing an activity limitation study to prevent harm	Keeri Beach, Gulf of Mannar, Vankalai Lagoon	No	Magazines,promotional campaigns via scientific community i.e. National Geographic
Boating/ yachting/cruising (Secondary)	Yachting/boating infrastructure (boats dock on the beach)  Promotion for boat tours	Regulations to mitigate impacts on wildlife and coastal ecosystems	High speed/high quality boats (for tours)  Availability of boat tours	Adding docking areas for boats  Developing boat tours  Enabling chartering services (for yachts)  Strategizing the “yachting corridor”	Long-term	Promotion and development of boat tours (especially for sea-bird watching)  Adding a jetty or docking area so that marine vessels such as yachts could be accommodated  Developing a yachting corridor between Mannar, Jaffna and Trincomalee	Mannar Bird Sanctuary (Vankalai Lagoon), Yoda Weda Sanctuary	No	Magazines,promotional campaigns via scientific community i.e. National Geographic

Fishing (Tertiary)	<p>Demarcations for fishing activities (to alleviate conflict with the sea cucumber farms)</p> <p>Training and capacity building for fishermen</p> <p>Enforcing ban on dynamite fishing</p>	<p>Eradicating dynamite fishing</p> <p>Avoiding conflict with the tourism sector</p>	<p>Developing fishing activities (incl. volunteerism activities)</p>	<p>Upskilling fishermen to lead tourism experiences (i.e. fishing trips and boat tours)</p> <p>Promoting activities</p>	<p>Short-term</p>	<p>Building landing pads that could be shared for fishing and tourist boats</p> <p>Developing community-based tourism activities (as part of a wider CBT strategy)</p> <p>Upskilling fishermen to become guides and to lead fishing experiences</p> <p>Promotion of fishing village</p> <p>Conservation of reef</p>	<p>Talaimannar Pier, Keeri Beach, Gulf of Mannar, Pesalai Fishing Village</p>	No	Magazines, promotional campaigns via scientific community i.e., National Geographic
Citizen science/ volunteerism (Tertiary)	<p>Partnerships between conservation centres and universities</p> <p>Volunteerism activities</p>	<p>Access to environmentally sensitive areas is limited (at best), resulting in data gaps</p>	<p>Need to establish research centre or facilitate collaboration with universities</p>	<p>Opening ESAs up to researchers and academics</p> <p>Develop volunteerism activities (for sea cucumber harvesting and other aquaculture activities)</p>	<p>Medium-term</p>	<p>Developing aquaculture citizen science and other volunteerism experiences to support existing industries (i.e. sea cucumber farming)</p> <p>Promote and develop aquaculture-based industries (following the Physical Plan for the Northern Province)</p> <p>Open area up for researchers and academics to study marine biodiversity (with special permissions given for sensitive areas)</p>	<p>Talaimannar Lighthouse, Dutch fort (Arippu Dutch Fort) and Mannar Fort, Thiruketheeswaram temple</p>	No	<p>Magazines, promotional campaigns via tourism community i.e., Travel &amp; Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc.)</p>

## Mannar: Actions, Needs and Aims - Summary

	Conservation & Safeguarding	Diversity & Spread	Tourism System Value Creation
Physical Resources and Infrastructure	<ul style="list-style-type: none"> <li>• Green energy infrastructure for transportation</li> <li>• Re-location and erosion protection support for tourism establishments</li> <li>• Demarcation buoys</li> <li>• Waste collection and management</li> </ul>	<ul style="list-style-type: none"> <li>• Fishery infrastructure such as fishing tools, storage areas and demarcating harbour areas for fishing boats</li> <li>• Transportation infrastructure (in Mannar)</li> <li>• Transportation infrastructure (to and from Mannar)</li> </ul>	<ul style="list-style-type: none"> <li>• Basic infrastructure</li> <li>• Add souvenir shops and tourist markets</li> <li>• Jetty construction</li> <li>• Boat infrastructure (international standard)</li> <li>• Upgrade to Talaimannar Pier</li> <li>• Eco-tourism resort development</li> <li>• Public bike and e-bike rental/charging stations</li> </ul>
Governance, management and organization	<ul style="list-style-type: none"> <li>• Eradication of dynamite fishing and other illegal fishing practices including bottom trawling</li> <li>• Additional protections for marine biodiversity</li> <li>• Protections for archaeological, cultural and historical sites pertaining to maritime heritage</li> <li>• Carrying capacity and activity limitation study</li> <li>• Assessment/study to determine vulnerable coastal areas in Mannar</li> <li>• Re-evaluating development projects and resource extraction</li> <li>• Capacity (within the Navy) to enforce activity limitations</li> <li>• Disaster risk management plan</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism workforce training and capacity building</li> <li>• Coordination and project collaboration between MEPA, CEA and the 20 different NGOs operating to work towards livelihood creation that prioritizes conservation through community engagement, gender equality and other identity-based initiatives</li> <li>• Government-led communication campaigns/outreach to the fishery community</li> <li>• Support for the development of NGOs focused solely on marine sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism promotional campaigns</li> <li>• Accessibility to tourist sites (permission granting process)</li> <li>• Additional Naval support to the coast guard and tourism activities</li> <li>• Development of a “multi-purpose” greenbelt</li> <li>• Development of an Eco-tourism zone</li> <li>• Blue Flag Certification</li> <li>• Destination development and marketing strategy</li> </ul>



## North-Eastern Coastal Belt

Type of activity	Infrastructure gaps and needs	Conservation needs (prior to promotion)	Competitiveness needs	Interventions for value add	Time line (Prioritization)	Strategy	Recommended Location	Presently Existing	Promotional Recommendations
Wildlife sightseeing (Primary)	Ad hoc booking only (for bird watching and boat tours)  Tourist signage Local guides	Precautionary measures, environmental impact assessments and activity limitation studies	Guided tours  Tourist signage and codes of conduct in environmentally sensitive areas Basic infrastructure	Promoting the area's sanctuaries, lagoons and marine habitats	Short-term	Developing tourism around the Kokkilai area (including bird watching activities)  Communication (signage) about species found in the area including: cormorants, ducks, egrets, flamingos, herons, ibises, pelicans, and storks Promoting the sanctuaries, lagoons and marine habitats along the coast to Trincomalee	Kokkilai Lagoon, Nanthikadal Lagoon, Chundikulam National Park	Yes	Magazines, promotional campaigns via scientific community i.e., National Geographic
Dark tourism & visits to historical/civil war sites (Primary)	Signage in areas that are closed off for landmine searching and sensitive military areas on beaches  Promotion of museums, sites of interest and historical monuments Local guides	Tourism signage to communicate about monuments and other sites	Promotion of the area as a tourism destination for this interested in Sri Lanka's history and culture	Training and capacity building for local guides (to share first-hand knowledge about what it was like during the civil war conflict)  Navy-led tours amongst the development of other niche tours (incl. for "dark tourism" sites)	Short-term	Training and capacity building for local guides (to share first person accounts of the conflict)  Signage at tourist attractions and sites of interest	Mullaitivu	Yes	Magazines, promotional campaigns via the scientific community i.e., National Geographic, Partnering with local and international NGOs and universities
Boating/ yachting/ cruising (Secondary)	Ad hoc booking only (for boat tours)  Boat rental services  Marinas, ports, jetties	Waste management systems (to prevent pollution) in marine areas	Boat rental/ chartering services  Additional marinas, ports, jetties, and cruise terminal expansion, increasing the number of boats and yacht arriving to the belt  Amenities, services and attractions for luxury minded tourists	Facilitate chartering services (for yachts) once infrastructure is in place  Tourism diversification strategy (to spread economic benefits and lessen environmental impact)  Promotion of the "belt" as a marine tourism destination (in the future)	Long-term	Strategize pathway into becoming a multi-destination stop between Trincomalee and Jaffna  Introducing infrastructure to increase capacity for yachts and multi-day marine vessels	Mullaitivu	No	Magazines, promotional campaigns via scientific community i.e., National Geographic

Diving and snorkeling	Water sports around the lagoon Need for additional leisure and marine exploration activities Dive tours and certification courses Areas to rent equipment	Eradicating dynamite fishing (awareness raising)	Dive tours (i.e. shipwreck diving) and dive certification opportunities Areas to rent equipment	Promote snorkeling Additional marine leisure activities Facilitate water sports around the lagoon area	Short-term	Develop shipwreck diving tours Support the development of dive operators Promote snorkeling	Mullaitivu, Kuchchaveli, Kokkilai, Nayaru, Nanthikadal and Mathalan Lagoons	No	Magazines, promotional campaigns via the tourism community i.e., Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc.)
Fishing activities/ experiences	Basic infrastructure Fishing community-based tourism products Upskilling for fishermen Enforcing ban on dynamite fishing	Enforcing ban on dynamite fishing	Basic infrastructure Community based tourism fishing experiences Sport fishing competition to promote the area for fishing tourism Tourist information about fishing activities	Training and capacity building for fishermen (to lead tours and fishing tours) providing alternative livelihoods for fishermen Development of voluntourism activities (for prawn cultivation and fishing)	Short-term	Tourist promotion for watching/ taking part in fishery activities Majority of locals are farmers or fishermen, there is the opportunity to develop this know-how into green and blue tourism products Tourist information on prawn cultivation and fishing as a colonial-era activity	Mullaitivu, Kokkilai, Nayaru, Nanthikadal and Mathalan Lagoons	No	Magazines, promotional campaigns via scientific community i.e., National Geographic

Eco-tourism	Product development Training and capacity building for community members to become guides and join the tourism workforce (as guides or as community-based tourism entrepreneurs)	Enforced environmental protections in nature areas	Flagship eco-tourism projects (like the Kuchchaveli Integrated Resort project concept)  Bike and ebike rentals and tourist signage for cycling and trekking paths  Easy-to-book tourism experiences	Eco-tourism product development & community-based tourism  Training and capacity building for local guides	Medium-term	Landscapes of Kokkilai lagoon, including scrub and open forests, provide eco-tourism potential  Handicraft-making with Palmyra (community-based tourism)  Water-based activities and adventure sports, provide the chance to transform the corridor into an eco-tourism hub through increased investment and connectivity  Integrating eco-tourism ambitions into Kuchchaveli and Mullaitivu's development  Beach of Kuchchaveli will be developed to the extent that the tourism zone becomes a self-contained village  Additional environmental protections	Kokkilai Lagoon, Mullaitivu and Kuchchaveli	No	Magazines, promotional campaigns via the tourism community i.e., Travel & Leisure, Conde Nast, Travel agencies, International tourism events (ITB WTM etc..)
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### North-Eastern Coastal Belt: Actions, Needs and Aims - Summary

	Conservation & Safeguarding		Diversity & Spread		Tourism System Value Creation	
Physical Resources and Infrastructure	<ul style="list-style-type: none"> <li>Coastal protection/counter-erosion measures to counter sea level rise and inundation</li> <li>Waste bins and management processes</li> </ul>		<ul style="list-style-type: none"> <li>Transport (Road repairs)</li> <li>Shopping area/kiosks</li> </ul>		<ul style="list-style-type: none"> <li>Basic infrastructure</li> <li>Tourism information and signage</li> <li>Tourist visitor centres</li> <li>Tour boats for bird watching (international standard)</li> <li>Marina and port infrastructure (Marina, port, jetties)</li> <li>Bike rental infrastructure</li> </ul>	
Governance, management and organization	<ul style="list-style-type: none"> <li>Carrying capacity and activity limitation studies</li> <li>Precautionary measures</li> <li>Development of a disaster risk management strategy</li> <li>Developing disaster-proofing regulations and other measures</li> <li>Eradicating dynamite fishing</li> <li>Protection status for wildlife and marine habitats</li> <li>Conservation support for environmentally sensitive areas (ESAs)</li> <li>Wildlife conservation through the creation of a wildlife corridor</li> <li>Conservation efforts to combat pollution, illegal construction, unplanned tourism</li> </ul>		<ul style="list-style-type: none"> <li>Training and capacity building to create integrated livelihoods for locals, i.e. tour guides, community-based tourism, maintaining nature trails</li> </ul>		<ul style="list-style-type: none"> <li>Tourism activity development (Cataloging, ticketing and tours)</li> <li>Tourism development projects</li> <li>Resort development projects</li> </ul>	

## Conclusion

In conclusion of the project, “TA-9881 SRI: Supporting Tourism Resilience”, this Deliverable 8 report combines the main insights and takeaways from the reports submitted by Ally Dragozet of Sea Going Green to the client: Asian Development Bank. For the primary objective of developing Sri Lanka’s marine tourism industry in Kalpitiya, Galle and Trincomalee in Scope 1 and Jaffna, Mannar and the north eastern coastal belt in Scope 2 to stimulate tourism recovery. As a result, the eight reports (Deliverables) highlighted the destinations’ most valuable marine tourism assets, opportunities for growth, current challenges and most significant gaps in need of being addressed by regulatory action and investment.

In line with the country’s goal of establishing marine tourism as a driver for tourism development and economic recovery, takeaways and recommendations considered the measures needed to enhance and protect Sri Lanka’s pivotal marine assets. This included special considerations given to conserving marine species, including reefs, marine fauna, and critical habitats facing challenges that threaten the continuity of their survival in Sri Lanka. As the economic viability of tourism activities is directly intertwined with conservation, diving, snorkeling, and wildlife watching were recommended to strive towards sustainable management and enforcement to maintain competitiveness. In tandem with preserving marine resources, the development of essential tourist infrastructure was suggested to prioritize increased visitor satisfaction and increasing the health of marine ecosystems. Recommendations, including the installation of waste bins, potable water facilities, rest-rooms, and changing areas at each tourist beach were recommended as vital tourism assets to build each of the target destinations’ reputations in line with international standards.

Tourism development in the three Scope 1 target destinations was placed on fostering marine anchor products and raising the standards of existing activities as opposed to introducing novel tourism experiences. Kalpitiya, Galle and Trincomalee have the ability to mitigate seasonality by enhancing their existing tourism products, improving their secondary products and promoting year-round activities that gradually expand their tourism offering repertoire. On the contrary, Scope 2 destinations, Jaffna, Mannar and the north eastern coastal belt, with lesser developed tourism industries, were recommended to develop their potential industries, with new tourism products, capacity building for local guides, tourism signage and streamlined permission processes for wildlife areas. Foundational marine tourism and accommodation infrastructure were additionally suggested to support the Northern Province’s capacity for increased tourism arrivals.

Each of the six target destinations possess (existing and potential) tourism products that are capable of becoming world-class experiences. By incorporating these recommendations and strategies into Sri Lanka’s maritime tourism development, the sector can unlock its growth potential, meet visitor demands, and solidify its position as a premier travel destination.

## Next steps

Marine tourism urgently requires additional regulatory support and enforcement capacity prior to undertaking any new development for tourism growth. Therefore, next steps should immediately prioritize protections for marine assets including vulnerable biodiversity, heritage sites and coastal tourism infrastructure, among others. Without which, the viability of marine tourism growth will not be possible without resulting in irreparable damage to Sri Lanka's most valuable tourism assets such as its prized coral reefs. Development that ignores current challenges and barriers will in turn lower the quality of tourism products and services and limit the value of high potential industries, particularly diving: inhibiting the potential for marine tourism.

Therefore, regulations and implementation measures are recommended for the following activities to guide future development, enforcement processes and capacity building initiatives.

- Stop the practice of dynamite fishing (To control on the purchase of dynamite/explosives, enforce punishments and increase penalties)
- Raise standards for whale watching, increase patrolling and penalties (to improve tourism operators' interactions with whales and other marine species and prevent illegal tourism activities)
- Develop a code of conduct (to ensure appropriate behaviour around vulnerable marine species)
- Protect and promote shipwreck diving (to conserve heritage and structural integrity of sites)
- Regulate the construction of tourism accommodations, infrastructure and other assets (closing informal channels and preventing projects taking place in areas vulnerable to climate change)
- Combat "unregistered" tourism businesses (who often do not abide by international standards and cause harm to marine assets)
- Enhance ticketing/ crowd control systems with proper patrolling (i.e. at environmentally sensitive areas such as Pigeon Island)
- Protect and enforce MPAs and ESAs (to support compliance and enhance tourist communications)
- Uphold tourism health and safety (as a general priority throughout development practices)
- Enable data collection and capacity building (to uphold existing regulations)
- Develop regulations specific to yachting, sailing and boating activities (that respect destination-specific carrying capacity)
- Improve port access and facilities (to encourage boats to stop in other destinations before Colombo)
- Ease regulations around kite/windsurfing in the Northern Province (to improve marketability of tourism products)
- Increase resilience by supporting disaster-proof construction methods (i.e. by sourcing disaster-proof materials and using nature-based solutions)
- Improve conservation practices in the fishery and tourism sectors (in terms of sourcing methods and promoting traditional practices)

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## Appendix

The Marine Tourism Roadmap for Sri Lanka was developed and compiled with inputs, ideas, and verifications from a strong 29-member steering committee representing the following Public and Private Sector Institutions and Individuals.

1. Presidential Secretariat
2. Ministry of Tourism
3. Sri Lanka Tourism Development Authority
4. Coast Conservation Department
5. Sri Lanka Ports Authority
6. Merchant Shipping Secretariat
7. Ceylon Fishery Harbours Corporation
8. Department of Fisheries and Aquatic Resources
9. Sri Lanka Coast Guard (Ministry of Defence)
10. Sri Lanka Navy
11. Department of Wildlife Conservation
12. Central Cultural Fund
13. Ministry of Environment
14. Marine Environment Protection Authority
15. Chamber of Marine Industries of Sri Lanka
16. Sri Lanka Sub-Aqua Club
17. Sail Lanka Charter
18. Recreational Divers



