



Schweizerische Stiftung für Solidarität im Tourismus
Swiss Foundation for Solidarity in Tourism

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Tourismus

Swiss Foundation for Solidarity in Tourism

Annual Report and Financial Statement
2004

4th Annual Report, 2004

Report on the Board's Activities

The Board held four meetings in 2004. The agenda was dominated by the evaluation of quarterly financial reports and by decisions on funding proposals. According to the rules of procedure, the preparatory work has been delegated to the foundation's offices, standing committees and individual members of the Board.

As the foundation is getting increasingly well known, 2004 saw an increased number of inquiries and actual funding proposals as compared to the previous years - an encouraging development. In the year documented, the funding committee reviewed a total of 18 proposals to determine whether they are in line with the foundation's objectives and guidelines for grant applicants, and presented them to the Board for their decision. Further information on the projects supported by the foundation can be found in the section on grants and in the annex to this report.

Apart from continuously subjecting the transactions made by the asset management to scrutiny, the finance and investment committee had, in November 2004, a detailed consultation with the portfolio manager in charge at Basellandschaftliche Kantonalbank. It was concluded that the principles of a defensive investment strategy formulated in the investment guidelines had been appropriate for the Foundation in the 2004 market environment and that this strategy should be maintained until further notice.

A project considered in the previous year to award innovative projects contributing to sustainable tourism development was successfully implemented in cooperation with the Institute for Tourism and Development (Studienkreis für Tourismus und Entwicklung e.V.), Ammerland/ Starnberger See. The Institute has since 1995 been organising the TO DO! Contest for Sustainable Tourism, the winners of which are announced every year at a public event at the International Tourism Exchange (ITB) in Berlin. In an agreement with the Institute, the Foundation has decided that each of the award winners of 2004, 2005 and 2006 will receive CHF 5,000.- in prize money from the Foundation. The Foundation takes part in the contest jury and personally hands over the prize money to the award winners, for the first time at ITB in March 2005.

In 2004, the founder, SSR Travel, Swiss Student Travel Office (cooperative), was finally liquidated and, with effect from 14th October 2004, the respective entry deleted from in the commercial register of canton Zurich. In accordance with a resolution taken at the last general assembly of the cooperative, the liquidation surplus of CHF 180,000.- was transferred to the SST Foundation. After closing all the accounts, another payment of CHF 15,000.- will be made at the beginning of 2005.

Outlook

The Foundation continues, within its possibilities and in accordance with its mission, to promote sustainable tourism development. After the growth in international tourist arrivals had slowed down in 2001–2003, their number increased to a record high in 2004 (by ten percent, to 760 million worldwide), with negative environmental and social impacts to the detriment of local communities in tourist destinations. Against this backdrop, strengthening projects and organisations that promote socially responsible and environmentally sustainable tourism remains an important concern. For 2005, the Board budgeted a total of CHF 125,000.- for grants and awards, the same amount as in 2004.

Grants and Awards

In the year under review, grants and awards amounting to a total of CHF 121,400.- were disbursed.

Overview: Projects and Organisations Supported in 2004

1. Helvetas Tourism Project, Kyrgyzstan	CHF 10,000.-
2. Study on sustainable tourism development in the Sangla Valley, Western Himalayas	CHF 14,000.-
3. Responsible Tourism Centre (GRTC), The Gambia	USD 8,620.-
4. Evaluation of socio-economic impacts of the Rolwaling ecotourism project, Institute of Sociology, University of Vienna	EUR 10,000.-
5. „Nature and Culture Uri“, Stiftung Umweltbildung und Tourismus Uri-Gotthard“	CHF 25,000.-
6. Ruedi's Lamas / Rudolf Mühlethaler	CHF 5,000.-
7. Ruta de las Culturas de Maiz, Aprotur, Guatemala	USD 12,500.-
8. World Social Forum 2005, Porto Alegre, Brazil	CHF 10,000.-
9. Contribution towards printing costs of the book "Verwirrende Realitäten: Interkulturelle Kompetenz mit Critical Incidents trainieren"	CHF 2,000.-
10. Awards for TO DO! Contest winners	CHF 15,000.-

The projects and organisations supported are described in detail in the annex to this report.

Annotations to the Financial Statement

As at 31/12/2004, the Foundation's assets amounted to CHF 6,883,407.-. While the revenues amounted to CHF 340,304.- (including unrealised capital gains on securities), the expenses (including grants and unrealised capital losses on securities) were CHF 291,275.-. The books thus show a profit of CHF 49,028.- in 2004. The net return on investment was 3.33 %, slightly less than in the previous year (2003: 3.66%). In the difficult stock market environment of 2004, this can still be considered satisfactory. Fixed-interest investments dominated, with a high percentage of 78 % of total assets. Resources from the liquidation surplus of the SSR Travel, Swiss Student Travel Office (cooperative), were invested in shares. This slightly increased the percentage of shares to 16 %. The Foundation's investment policy, however, is long-term and cautious, so that in the future the percentage of shares should not be increased much further. The investment guidelines set the maximum percentage of shares at 30 %.

The administrative costs were again reduced slightly, as compared to the previous year, and amounted to CHF 42,600.- (2003: CHF 44,150.-). The actual costs were thus a little less than the budgeted costs of CHF 45,000.-.

The capital gains realised from the sale of securities and the revenues from securities amount to CHF 198,719.-, slightly less than the budgeted amount of CHF 200,000.-.

Board of Directors

Hansjörg Ruf, President
Hans Ulrich Schudel, Vice President
Michael Andres, Treasurer
Esther Ineichen
Theodor Schmid

Auditors

Ernst & Young, auditors, Basel

Board Committees

Finance and Investment:

Michael Andres
Hansjörg Ruf
Hans Ulrich Schudel

Funding:

Esther Ineichen
Hansjörg Ruf
Theodor Schmid

Approved at the Board meeting on 16th June, 2005

Annex

Projects and Organisations Supported in 2004

1. Helvetas Tourism Project in Kyrgyzstan, CHF 10,000.-

Tourism is regarded as one out of a very few possibilities to provide an external income for remote rural areas in Kyrgyzstan. The scenery and culture of Kyrgyzstan are very attractive and tourism has considerable potential for growth. However, this requires an improved tourism infrastructure and more customer-friendly services. Through support and training Helvetas wants to increase quality standards to a level that meets the requirements of tourist groups as well as individual travellers. In cooperation with tour operators in Kyrgyzstan, including NoviNomad, the project is pro-actively marketed in Western Europe, and particularly in Switzerland.

The project phase is from 2003 to 2005, the project budget totals around CHF 550,000.-.

During the project phase, the SST Foundation contributes CHF 10,000.- annually.

Information: www.cbtkyrgyzstan.kg
 www.helvetas.ch/deutsch/projekte/laender/asien/kirgistan.html

2. Study „Sustainable Development of Tourism and Agriculture in the Sangla Valley, Himachal Pradesh, India / CHF 14,000.-

The Sangla Valley is situated in Himachal Pradesh in the Western part of the Indian Himalayas. Foreign tourists have been visiting the valley since 1995. Since then, the number of both visitors and recently built guest houses has been increasing at a fast rate. A couple of larger hotels have also been built, which shows the dynamics of tourism-induced change. The valley undoubtedly has an enormous tourist potential for both Indian and foreign tourists. Its beauty is currently being widely praised. For example, the “Lonely Planet North India” (2001) describes the valley as follows:

„The Sangla or Baspa, Valley has been called the most beautiful valley in the Himalaya and for once this is more than just marketing jargon. Strung out around the valley floor are a number of ancient villages with traditional stone and timber architecture, friendly people and magnificent mountain scenery on all sides.”

Due to the increasing popularity of the valley and the interest of some of the inhabitants to make use of its tourist potential, the Sangla region risks being overrun by tourists, as it has already happened in other valleys in the Himalayas.

Local people in the Sangla Valley regard tourism as a source of income which can help improve their standards of living. At the same time, people seem to become increasingly aware of the potential destruction associated with tourism. Some inhabitants of the valley mobilised resistance against a hotel project in Sangla. Many inhabitants seriously want to be involved in and responsible for the development of their valley. They have formed a group of about 25 people promoting the development of tourism in a way that takes into account both the natural living conditions and their cultural heritage.

In the study, the authors want to use scientific methodology to find out what kind of development would be in line with the internal and external needs of the people in the valley. The results of the study are to support the Sangla Valley Sustainable Development Group, which has been set up in the Sangla Valley, in their efforts to promote the sustainable development of the valley. Tourism and agriculture in the Sangla valley are to be steered towards sustainability.

The research has been conducted in cooperation with the agricultural university of Himachal Pradesh, Palampur and the Swiss Federal Institute of Technology, Zurich. The idea for the project emerged during a study tour by Frank Eyhorn (Research Institute of Organic Agriculture, FiBL) in the Sangla Valley in November 2003 from the interaction with a group of inhabitants of the valley who had taken the initiative. The Research Institute of Organic Agriculture has actively accompanied the research

which is regarded as a preparation for future development projects in the Sangla Valley. The Institute was involved in developing the concept and in conducting workshops and interviews in the field. The institute evaluated the measures proposed and verified the results.

The authors of the study, Bettina Isler and Michael Jenny, were students in environmental sciences at the Swiss Federal Institute of Technology, Zurich. The research was conducted between April and October 2004.

The SST Foundation contributed CHF 14,000.- to make this research possible.

Information: www.fibl.ch
Contact: samuel.moser@fibl.ch

3. Capacity Building for the Gambia Responsible Tourism Centre (GRTC) / USD 8,600.-

The Gambia on the Western coast of Africa is one of the smallest countries of the African continent. It is one of the poorest and least developed countries in the world. 54 percent of the population of 1.3 million live on less than one US-Dollar a day. The country has few natural resources and few economic opportunities in the global market. Tourism is regarded as the most important economic sector in the Gambia and can provide leverage for poverty reduction.

This project aims at developing and building a small centre for training, research and capacity building to promote „Responsible Tourism Management“ in cooperation with the „International Centre for Responsible Tourism of the University of Greenwich, U.K.“ This centre wants to make use of a multi-stakeholder-approach to ensure that tourism development in the Gambia takes into account the principles of sustainable tourism, and that the various players (tour operators, the local tourism industry, the government and the informal sector) are enabled to keep the negative cultural and social impacts of tourism at a minimum.

The centre is managed by Adama Bah. Mr. Bah is the Executive Secretary of GTC (Gambia Tourism Concern) and Secretary of ASSET (Association of Small Scale Enterprise in Tourism). Both organisations were involved in the organisation of an international forum on “fair-trade in tourism” and are actively involved in promoting sustainable tourism in the Gambia. The organisations have been asked to be the coordinators of „Action for Fair Trade in Tourism – Africa (AFTTA)“ for various African countries (South Africa, Uganda, Nigeria, Tanzania, Kenya, Senegal and the Gambia).

Adama Bah has managed several projects in the field of „pro-poor tourism“ and is research partner of Dr. Harold Goodwin, Director of the International Centre for Responsible Tourism in the Department of Earth and Environmental Sciences, University of Greenwich. He conducts post-graduate studies for „MSc in Responsible Tourism Management“.

The costs budgeted amount to a total of USD 56,000.-. The Foundation supports the project with a grant of USD 8,620.- (about CHF 10,000.-)

Information: www.asset-gambia.com
 www.gambiatourismconcern.com
 www.icrtourism.org

4. Evaluation of socio-cultural impacts of the Rolwaling Eco-Tourism project of the Austrian NGO Himal / EUR 10,000.-

This project is aimed at evaluating the socio-cultural impact of the Rolwaling ecotourism project conducted by the Austrian NGO Eco Himal (www.ecohimal.org). The results of the empirical field research serve as a basis for decision-making and planning for this and other tourism development projects.

The project was initiated in 1996. The Rolwaling region in the Northeast of Nepal was selected as project region. The project aims at building a community-based tourism infrastructure in the project

region that promotes the conservation of the environment and the cultural heritage, off the main trekking routes. The controlled development of tourism is regarded as a contribution to the socially sustainable development of the region. The project aims at building a basic needs infrastructure (including clean water, restoration and maintenance of paths and bridges) as well as generating additional income from tourism (including the building of lodges and campsites, training programmes in the necessary skills such as lodge management, mountain security, English courses, production and marketing of local products). The methods to achieve this aim follow the principles of sustainability, participation (community based development), empowerment and pro-poor tourism.

However, the development project interventions also create tension between the local people involved in the projects and those not involved, public institutions and foreign project staff. The development project interventions have socio-economic and socio-cultural impacts on the social structure of the project communities as well as the identity of the local people and their associations. These changes have an influence on the social participation and the structures of civil society. They also have an influence on the social fabric which is marked by strong traditional vertical divisions and intertwined ethnic, religious and economic structures.

The results of the research are based on an analysis of the socio-economic and socio-cultural impacts and inter-linkages of the interventions.

The evaluation will be carried out from March to December 2004. The budget amounts to about EUR 50,000.-. The proposal submitted to the SST Foundation covers part of the field research from 24/09 to 14/10/2004 in Nepal and the preparation and presentation of a study report.

The research is conducted as part of a seminar in „tourism sociology“ at the Institute of Sociology at the University of Vienna.

The Foundation contributes EUR 10,000.- (ca. CHF 15,000.-) to the project.

Contact: Prof. Dr. Franz Kolland, franz.kolland@univie.ac.at

5. Project „Nature and Culture Uri“ / CHF 25,000.-

Canton Uri is known above all for its infrastructural axes crossing the canton from North to South. People recall the traffic jams at the Gotthard, the view of the church of Wassen which can be seen from the train, as well as the large construction site of AlpTransit for the new Gotthard Basis Tunnel. Over the past decades, tourism and recreation have become important elements of modern life. They include a broad range of activities, with the demand for nature-based recreation and adventure increasing considerably. Hiking is gaining importance as a leisure and holiday activity.

Canton Uri with its hardly developed valleys and ridges presents good potential for nature and landscape-based tourism that supports sustainable development. An intact environment and an attractive scenery are among the foundations of sustainable tourism. Several surveys conducted within the framework of Swiss tourism market research show that the majority of guests regard factors such as the „landscape“, the „peace and quietude of the place“, the „state of the environment“ and the „view of the place“ as important when assessing the tourist value of a place.

The Urner Oberland and the side valleys are faced with considerable structural problems. The difficult financial position of municipalities, the cutting of jobs, the closing down of shops, schools and other village institutions as well as the dwindling cultural identity in the region lead to out-migration, while the situation is aggravated by increasing mobility.

There is a need for new innovative initiatives in tourism, trade and agriculture. Without such initiatives, the conditions ensuring the preservation of live and culture and of natural and cultural environments can no longer be maintained.

The project aims at attaching an economic value to landscape and culture, at education about nature, landscape and culture and at the promotion of nature-based, landscape-oriented tourism in order to contribute to sustainable regional development.

The project links the three pillars of sustainable development: regional economy, ecological upgrading, socio-cultural empowerment. The project organisers also place major emphasis on participation and cooperation.

The applicant is the Foundation "Umweltbildung und Tourismus Uri-Gotthard". The project committee includes representatives of the corporations of Uri and Ursern, of the canton Uri, of the tourist information Uri, of the Working Group „Naturkundliche Höhenwege“, of "Top of Uri" ("Uri Gotthard hoch hinaus"), of the association "Urner Wanderwege" and the Swiss Foundation for Landscape Protection and Management (SL/FP)

The costs of the project are calculated as a total of CHF 370,000.-, out of which CHF 100,000.- will be covered by the Swiss Foundation for Landscape Protection and Management and CHF 10,000.- by the canton Uri.

The SST Foundation supports the project with an amount of CHF 25,000.-.

Contact: Bruno Zwysig, Director, „Nature and Culture Uri“, b.zwysig@bluewin.ch

6. Ruedis Lamas / Rudolf Mühlethaler / CHF 5,000.-

In as early as 1750, the first spa with its own sulphur spring was established in Schwarzsee, marking the beginning of tourism development in the region. Today, the Schwarzsee and its surroundings are a holiday and excursion destination; last but not least because of its mountain and hiking routes to the nearby peaks of Kaiseregg, Spitzfluh and Schwyberg. From the Schwarzsee valley, hiking and biking routes lead through an impressive mountain scenery with passes to Greyerzerland and the Jaun and Simmen valleys. The Breccaschlund is particularly beautiful and untouched. For both fauna and flora, this unspoilt, rough and therefore particularly beautiful basin in between Spitzfluh, Schopfenspitz and the Recardets provides one of the last unspoilt retreats from increasingly dramatic human influence. In 1996, the Breccaschlund was included in the federal inventory of landscapes and natural heritage worth protecting.

With his slow lama tours, Rudolf Mühlethaler wants to contribute to the „deceleration“ of leisure and recreation and in this way wants to acquaint his customers with the scenery and nature of the Schwarzsee region. Since 2003, he has been offering lama trekking tours which have been increasingly successful and which are also advertised by the Schwarzsee tourism association. In the future, he is planning to expand his programme to include holidays for families with little income. The lama tour business is currently a side business, as in his main job he works as a lorry driver. In the Schwarzsee region, tourism provides one of the often required additional sources of income, which to some extent help prevent out-migration from the region.

As a family man and with his income as a lorry driver, R. Mühlethaler does not have the financial means to expand his programme. The budget for the expansion phase is CHF 30,000.-.

The SST Foundation supports R. Mühlethaler's initiative with a grant of CHF 5,000.-

Information: www.schwarzsee-tourismus.ch

7. Promotion of the Central American Sustainable Tourism Offer (Ruta de las Culturas de Maiz) / Aprotur, Guatemala/ USD 12,500.- (about CHF 15,600.-)

Applicant: APROTUR (Asociacion de Promocion y Desarrollo Turistico de Guatemala) La Antigua/Guatemala

APROTUR is an independent NGO without political or religious affiliation, working to promote social and cultural development in Guatemala. APROTUR wants to raise awareness among local tourism service providers, local communities and tourists for sustainable tourism development in Guatemala. In addition, the organisation wants to contribute to improving the quality of tourism products in Guatemala by qualifying local entrepreneurs in tourism. APROTUR was founded in 2000 and is supported by the German Church Development Service (EED) and through programme funding from USAID (Regional Environmental Program for Central America).

The initiative „Ruta de las Culturas de Maiz“ was launched as a follow-up to a congress which took place in August 1998 in Managua under the title "Tourism in Central America: Integration and Micro Company". Representatives of the tourism industry and NGOs from Central America participated in the congress. They decided to coordinate their efforts to market the services of small and medium-size enterprises in the countries of Central America under the brand name „Ruta de las Culturas de Maiz“ and to promote the development of tourism in the region in line with the principles of sustainable development.

Developing actual tourism products is at the heart of the project. Supported by local NGOs, the project is to place particular consideration on promoting the culture and integration of local communities. The „Group of 7“ was established to support small enterprises, to involve local communities and to ensure the implementation of the objectives of the project „Ruta de las Culturas de Maiz“. This group currently includes NGOs from Belize, Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica and Panama. The „Group of 7“ ensures a transfer of knowledge between the individual countries and makes it possible to establish a regional concept of tourism development, taking into account the specific characteristics of the countries involved.

As a member of the „Group of 7“, APROTOUR is one of the executive organisations of the „Ruta de las Culturas de Maiz“ initiative. The organisation provides training for tourism service providers and works towards the introduction of economic, social and ecological standards. The initiative wants to provide an additional income for rural communities and to strengthen the efforts made by communities in the field of „community-based-tourism“. The objective is to certify products on the medium or long term, using the „GREEN Deal“ standards of the „GREEN Alliance“. In Costa Rica and Nicaragua, certification according to the CST standards (Certification of Sustainable Tourism from the Costa Rican Tourism Institute) is to be applied.

The project „Promotion of the Central American Sustainable Tourism Offer“ aims to introduce and advertise the initiative „Ruta de las Culturas de Maiz“ in the European market. To this end, marketing strategies and promotional material shall be developed (such as printed matter, website, CD etc.). Furthermore, contacts with European tour operators and travel agencies are to be established.

The budgeted costs for the project are USD 43,700.-. The amount applied for at SST is USD 38,180.-.

The Foundation supports the project with a grant of USD 12,500.- (ca. CHF 15,600.-)

Information: www.centroamerica-rutadelmaiz.com

8. World Social Forum 2005 / Instituto Terramar / CHF 10,000.-

Applicant: Instituto Terramar, Fortaleza/Brazil

Instituto Terramar has provided advice and support for communities on the north-eastern coast of Brazil (Ceara) in the planning and implementation of socially responsible tourism projects. The area of operation of Instituto Terramar extends to over 576 kms of coastal stretch of the state of Ceará in the north-east of Brazil. Since 1993, the work has concentrated on the fishing communities of Prainha do Canto Verde and Fleixeiros. The SST Foundation has already granted financial support to other projects of Instituto Terramar.

At the World Social Forum 2004 in Mumbai/India, tourism issues were raised for the first time at a WSF. In 2003, the SST Foundation supported the organisers in Mumbai (the NGO [Equations](#)) with an amount of EUR 30,000.-. At WSF 2005 in Porto Alegre, the „Tourism Interventions-Group“ wants to take up and continue the debate on the global development of tourism.

The Tourism Interventions Group was established for the 4th World Social Forum (WSF) in Mumbai. It includes individuals and organisations from Europe, Asia, Latin America and Africa working on the impacts caused by the tourism industry, highlighting and denouncing the consequences of undesirable tourism trends for ecosystems and local communities. In a declaration the group declared their commitment to change the character of global tourism towards a tourism that is equitable for communities in the tourism destinations. The interventions at WSF 2004 (including an intercontinental dialogue on tourism and four seminars) received major recognition.

The main objective of the participation at WSF 2005 in Porto Alegre is the strengthening of the network of community-based tourism initiatives in Brazil and Latin America. The WSF offers an ideal platform to achieve this and in addition attracts international attention.

Instituto Terramar has been invited to organise the tourism interventions at WSF 2005.

For the organisation and implementation of the WSF tourism interventions, the budget needed is USD 20,000.-.

The SST Foundation supports the interventions at WSF 2005 with an amount of CHF 10,000.- .

Information: www.terramar.org.br
 www.akte.ch

9. Publication: „Verwirrende Realitäten: Interkulturelle Kompetenz mit Critical Incidents trainieren“ / CHF 2,000.-

With global economic inter-linkages, migration and tourism, intercultural communication has become indispensable. The Working Group on Intercultural Communication works on a book to be published by Pestalozzianum publishers, which explains the theory of intercultural communication in an easy manner. At the heart of the book (“Confusing realities – training of intercultural competence through critical incidents”) lies the practical work with “critical incidents” – short stories of intercultural encounters. Critical incidents are a method of developing skills in the field of intercultural communication.

The Working Group on Intercultural Communication (AGIKO) includes eight persons who – with one exception – studied social anthropology at the University of Zurich and looked at didactic methods of intercultural communication.

The Foundation supports the publication of the book with an amount of CHF 2,000.- towards printing costs (by 31/12/2004, 460 copies of the book had been sold.)

Alain Bertallo et al. (ed.), Verwirrende Realitäten, Interkulturelle Kompetenz mit Critical Incidents trainieren, Pestalozzianum Publishers, Zurich, 2004. ISBN 3-03755-013-9

10. Prize for TO DO! Contest Award Winners / total CHF 15,000.-

At the International Tourism Exchange 2005 in Berlin, the following projects were awarded with a TO DO! and received prize money of CHF 5,000.- each from the SST Foundation.

Finca Sonador, Costa Rica

True to its name, the TO DO! 2004 winner FINCA SONADOR from Costa Rica is an entire village community that arose from a former refugee project founded in 1979. As offshoot of the pan-European movement Longo Mai, FINCA SONADOR was originally conceived as a refugee centre for Nicaraguan families, which had to flee the terrorist regime of the dictator Somoza. In the meantime, however, FINCA SONADOR has grown into a village with 400 inhabitants, which today largely runs itself independently. The village community lives from its farming products, on the one hand, and from a special kind of touristic concept on the other: the kind of project tourism that is aimed at long-term visitors, is affordable for young people as well (at app. 7 US dollars for overnight accommodation and full board). An important feature of the project is that the visitors can and wish to become familiar with the daily lives of the local population. Therefore, FINCA SONADOR is oriented to people who are prepared to live together with the village community and to share their knowledge and ability in return for experiencing first-hand the meaning of "Convivencia" - the art of living and surviving together. Overall, FINCA SONADOR has 30 host families that can accommodate visitors. A small portion of the income is paid as "visitor's tax" to the local village tourism committee, which is the administrative body that ensures that as many families as possible are given a chance to participate in the income from tourism. At the same time, the committee also exercises a management and control function, for

example, with a view to self-determination for the development of tourism, the training of guides and for determining the quality requirements for the tourist accommodations.

Address:

Comité de Turismo
FINCA SONADOR
Cooperativa Longo MaiApdo:292
8000 San Isidro de El General P.Z. Costa Rica

Tel./Fax: +506-771- 4239 E-Mail: zsp@gmx.net
und: nueva@racsa.co.cr

Web: www.sonador.org

Finca Esperanza Verde, Nicaragua

The development of the US-Nicaraguan community project FINCA ESPERANZA VERDE in San Ramón, Nicaragua, has a similar background (the ousting of the Nicaraguan Dictator Somoza and the subsequent outbreak of the civil war between the Sandinistas and the US-financed Contras). The motivation, however, is different: The founding of the FINCA ESPERANZA VERDE is grounded in the private initiative of the US citizen Lonna Harkrader, who together with her husband came to San Ramón in the early 1990s. In the face of the disastrous economic situation at the time, Lonna Harkrader felt ashamed "that a strong country like the USA, would fight against a weak country like Nicaragua until it nearly was destroyed". This was the motivating force behind the creation of today's touristic offer of FINCA ESPERANZA VERDE and its support NGO network of "Durham-San Ramón Sister Communities": On the one hand, the project provides holiday lodging in the beautiful mountains of San Ramón (max. 26 beds), on the other hand, it also offers stays with private families in San Ramón. This has meant that women could earn their own money, and that holiday guests could experience the everyday life of the locals and their extraordinarily friendly hospitality first-hand. In addition, it is important to know that the NGO network has facilitated the sale of practically the entire organically farmed coffee harvest of the participating Campesinos to an ecologically oriented coffee roaster in the USA. San Ramón-coffee now has its own trademark, with which the participating coffee growers can get nearly four times the world market price. The earnings have enabled the local population to realize numerous beneficial measures in San Ramón over the years: school projects, water supply, small credits, which today are administered and managed largely independently.

Address in the United States:

Lonna Harkrader
Finca Esperanza Verde
Durham-San Ramón Sister Communities, 1320 Sheperd Street,
Durham, NC 27707, USA

Tel. 001-919 489-1656
Fax:001-919 493-5908

E-Mail: info@durham-sanramon.org
Web: www.durham-sanramon.org
www.finca-esperanzaverde.org

Address in Nicaragua:

Yelba Valenzuela
Finca Esperanza Verde
Apart. P # 28 Matagalpa/Nicaragua

Tel./Fax: 00505-612-5003
E-mail: herma@ibw.com.ni
Web:www.finca-esperanzaverde.org
www.sanramonecolodge.org

Chumbe Island Coral Park, Zanzibar/Tanzania

The third prize-winning project operates almost exclusively with local management. This is the CHUMBE ISLAND CORAL PARK tourism project developed by former German GTZ staff member Sibylle Riedmiller. The project is a part of an overall environmental, social and developmental project built around the Eco-lodge of Chumbe Island. Chumbe Island itself is a small island located twelve kilometres south of Zanzibar, which is almost entirely covered by forests. The island and the surrounding coral reef are protected as a maritime biodiversity reserve. Visitors to the island can learn much about our planet. However, the tourism provided on the island is and remains limited; a gem in the midst of an exemplary ecological environment created out of local materials. Naturally, at the same time tourism also brings just enough money to finance a) the environmental protection measures and b) pay the staff of 41 local employees and the environmental training programme for school children. According to the rationale for awarding the TO DO 2004 prize, former fishermen have meanwhile been transformed into "park rangers" and the island has already been visited by two thousand local school pupils and 160 teachers, who have come on day trips since 1998. If the approach taken with CHUMBE ISLAND CORAL PARK could also be successfully applied on a larger scale, given the right economic and social structures, this would provide a true benchmark example of well-conceptualised developmental tourism in a coastal region.

Address:

CHUMBE ISLAND CORAL PARK
Sibylle Riedmiller/Helen Peeks
P.O.Box 3203, Zanzibar/Tanzania

phone/fax: +255-24-2231040
E-mail: info@chumbeisland.com
Web: www.chumbeisland.com

Information on the TO DO! Contest for Socially Responsible Tourism:

www.studienkreis.org

Balance Sheet 2004**DOC 01.05**

	2003	2004
	CHF	CHF
ASSETS		
Current Assets		
Cash and Cash Equivalents	10,427.47	78,416.74
Other Assets	39,527.42	39,663.00
Accrued income, deferred expenditure	0.00	0.00
	<u>49,954.89</u>	<u>118,079.74</u>
Fixed Assets		
Invested capital	<u>6,321,589.95</u>	<u>6,557,750.65</u>
	<u>6,321,589.95</u>	<u>6,557,750.65</u>
	<u>6,371,544.84</u>	<u>6,675,830.39</u>
LIABILITIES		
Borrowed capital		
Deferred Income	<u>24,760.70</u>	<u>85,017.65</u>
	<u>24,760.70</u>	<u>85,017.65</u>
Capital resources		
Total capital of the foundation	6,688,406.70	6,883,406.70
Loss carried forward	-396,315.61	-396,315.56
Profit carried forward	0.00	54,693.00
Profit	54,693.05	49,028.60
Loss	0.00	0.00
	<u>6,346,784.14</u>	<u>6,590,812.74</u>
	<u>6,371,544.84</u>	<u>6,675,830.39</u>

Profit & Loss Account 2004**DOC 01.05**

	2003	Budget 2004	2004
	CHF	CHF	CHF
EXPENDITURE			
Remuneration for participation in meetings	7,600.00	8,000.00	7,600.00
Extra expenses - Board	3,438.00	2,000.00	2,756.65
Board allowances	2,600.50	3,600.00	3,014.65
Public relations	4,240.35	5,000.00	1,375.85
Finance and Investment Committee	6,022.05	4,000.00	5,425.75
Funding Committee	4,303.00	5,000.00	7,875.00
President/Vice President	3,000.00	4,000.00	4,875.00
Office	2,400.00	2,400.00	2,400.00
Accounting	7,200.00	6,000.00	5,475.00
Administrative expenses	3,351.05	5,000.00	1,802.15
Operational and administrative expenses	44,154.95	45,000.00	42,600.05
Asset management	26,531.95	29,000.00	27,244.70
Bank charges	333.25	1,000.00	1,518.85
Unrealised capital losses on securities	80,398.80	0.00	67,116.40
Realised capital losses on securities	0.00	0.00	31,379.15
Financial expenditure	107,264.00	30,000.00	127,259.10
Grants	127,321.85	125,000.00	121,416.50
Grants and awards	127,321.85	125,000.00	121,416.50
Total expenditure	278,740.80	200,000.00	291,275.65

INCOME

Unrealised capital gains on securities	143,036.75	0.00	141,584.85
Realised capital gains on securities	6,100.00	0.00	2,300.00
Gain on securities	184,297.10	200,000.00	196,419.40
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Financial returns	333,433.85	200,000.00	340,304.25
Total income	333,433.85	200,000.00	340,304.25
Profit	54,693.05	0.00	49,028.60
Loss	0.00	0.00	0.00
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	278,740.80	200,000.00	291,275.65
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