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ABSTRACT: Two of the main cruise ship tourism destinations in the mesoamerican barrier reef, Belize City and Cozumel, conducted in 2007 parallel participatory processes to improve responsible management of cruise ship tourism at a destination level. Their process fostered an intersectoral dialogue between the local government, the cruise ship industry, the local business community and the civil society to analyze issues and propose hands-on solutions. In both cases, the participants were able to deal with sensitive issues and prepare very joint practical activities that are in process of being implemented successfully.

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Participatory Planning for Sustainable Cruise Ship Tourism in Mesoamerican Reef Destinations

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Abstract

The growing policy consensus is that sustainable tourism planning must include stakeholder consultation and involvement (UNEP, 2003). This paper argues that consultation and involvement may not be sufficient to ensure a tourism plan is implemented successfully; real stakeholder participation is necessary. Traditional expert-driven planning processes, even when they include a consultation and involvement component, may fail to achieve real “participation” (World Bank, 1996).

An alternative approach is a participatory planning process, a mediated inter-sector dialogue in which sector representatives negotiate differences, design together a plan that accommodates their competing interests, and commit to its implementation (Bonilla, 1997). Two recent case studies of participatory planning processes in the Mesoamerican Reef are presented: Cozumel, Mexico, and Belize. Both achieved apparent success in designing tourism management plans with broad, explicit and public stakeholder support, and early implementation of pilot projects by multi-stakeholder working groups. They also exhibit the characteristics proposed by the World Bank (1996) to define true “participation”.

This paper describes the planning approach used at each site, a brief description of the plans produced, as well as conclusions and recommendations for further research.

Introduction: Participatory planning vs. Expert-Driven Planning

There is a broad consensus that sustainable tourism planning must include stakeholder involvement and consultation. For example, the United Nations Environmental Program (UNEP) recommends each country to establish a national tourism strategy and a master plan for tourism development and management, integrated with national and regional sustainable development plans (UNEP, 2007). UNEP proposes that a condition for success is the involvement of “all primary stakeholders, including the local community, the tourism industry, and the government” in the development and implementation of tourism plans (UNEP, 2007). The Cape Town Declaration, proposed during the 2002 Cape Town Conference on Responsible Tourism in Destinations organized by the Responsible Tourism Partnership and Western Cape Tourism, characterizes Responsible Tourism as involving “local people in decisions that affect their lives” and makes actively involving the local community in planning and decision making a guiding principle for social responsibility. The declaration also encourages local authorities and tourism enterprises to develop destination management strategies through multi-stakeholder processes (ICRT, 2008).

Despite the policy consensus, typical technical approaches for strategic planning processes by countries, regions, and cities still revolve around the central role of an expert (or team of experts). This expert analyzes the current situation, gathers data, and interviews representatives of the different sectors involved (private, public, and civil society). Based on this information, the expert develops a strategic document outlining major objectives, physical plans, and action plans to achieve them. Although the consultation process may inform the final product, major design decisions are centralized (Cooper and Flehr, 2006). Although no empirical data are currently available, there is ample anecdotal evidence that suggests many such plans result in ultimate implementation failure, despite their technical quality.

What is the alternative? Beyond stakeholder consultation and “involvement” lies participatory planning, stakeholder-centered processes in which the expert moves to the margin and plays a role of mediator and facilitator rather than simply a source of

technical expertise (Bonilla, 1997). Participatory planning may have several advantages, such as providing openness, fairness and accountability, strengthen the plan with information and ideas, promote consideration of broad ranges of interest, allow disagreement and complaints to be aired, inform interest groups of difficult choices, and increase acceptance of planning and decisions arising from it (FAO, 1998). It has also been proposed that the presence of a variety of opinions enriches the planning process, as the opinions of “outsiders” provide improved understanding of the situation (Robinson, 1982).

A driving force promoting stakeholder-driven planning processes is the World Bank Group. A four-year Learning Group on Participatory Development produced a Participation Sourcebook (World Bank, 1996) outlining Bank-supported projects designed using what they call the “participatory stance” and contrasting it with the “external expert stance”. This is the approach used traditionally by the Bank, in which their experts collect information and design the project. Although experts often consulted and listened to stakeholders, the Bank now recognizes that consultation and listening is a critical prerequisite but does not on itself constitute “participation”. The case studies in the Sourcebook characterize the participatory stance as processes where consulting and listening were followed by “social learning”, “social invention”, and “commitment” in which stakeholders learn, internalize and invent new practices and behaviors compatible with the project, and commit to implement it. Thus, all steps of planning from setting objectives to designing strategies and tactics are performed collaboratively. The World Bank now defines participation as “a process through which stakeholders influence and share control over development initiatives and the decisions and resources which affect them” (World Bank, 1996).

A key factor in this implementation failure of expert driven planning may be the inability of expert-based processes to deal with inter-sector conflict. When interviews reveal inter-sector conflict, the expert has two options: to favor the point of view of one sector or to propose independently a middle-ground solution that attempts to conciliate divergent interests. Strategies thus designed lack three critical elements for successful implementation: a) each sector must compromise some of its own interest, b)

acceptable interaction procedures that build inter-sector trust are established, and c) new practices are incorporated to daily activities to adapt to the new strategic environment (Bonilla, 1997).

Without these elements, inter-sector conflict is not addressed, and may be exacerbated when sectors involved resist the implementation of a strategic plan they consider infringes their interest. Facing this resistance, the body responsible for the plan implementation has to overcome it by exercising authority, implement the plan only partially, or discard the plan and start again. Any of these alternatives represents a failure of the strategic planning process (Bonilla, op. cit. 1997).

However, stakeholder-driven planning processes may also generate pitfalls of their own by diminishing the role of the expert. It is evident that expert-driven planning processes benefit from the experience of the expert and the use of technological tools such as computer simulations (Lawson, 2006). Advocates of expert-driven processes also point at the expert's positive role as an objective observer able to propose "just" solutions that cannot be obtained by a stakeholder-driven communicative process due to relative differential power relations (Fainstain, 2000). It has also been suggested that communicative planning processes are most suitable for sites with diverse societies and developed economies, which would allow for improved management of issues of power (Healy, 1992).

Participatory planning processes do not rely only on the individual tourism planning expertise of a consultant, but in the development of a network that integrates the collective expertise of all stakeholders and facilitates cooperative implementation (Dredge, 2006). This cooperative development model shares some characteristics with open source software development (Raymond, 2001) and peer-to-peer networks, in which users contribute their own time and resources to a shared project. These networks are disruptive technologies, as they return content, choice and control to users (Dingledine, Freedman, and Molnar, 2001).

Stakeholder acceptance of the plan may thus be relatively more important than technical quality as related to implementation success. Multivariate studies have

suggested that resistance to planning, a contextual element, has stronger impact on the effectiveness of strategic planning than individual design elements such as external orientation and the use of diverse planning techniques (Vasudevan & Venkatraman, 1987).

Case Studies from the Mesoamerican Reef

In 2007, the author facilitated, pro bono, two participatory planning processes aiming at developing action plans to improve the management of cruise tourism visitation in Cozumel (Mexico) and Belize. These are two major destinations in the vulnerable Mesoamerican Reef, the world's second largest reef system. These processes may provide insights on the opportunities and challenges of following a participatory stance for tourism strategic planning.

These processes were the result of a partnership between Conservation International (CI) and local government agencies as part of the Mesoamerican Reef Tourism Initiative (MARTI). MARTI seeks to address the challenges generated by the approximately five million cruise passengers visiting the reef each year (MARTI, 2007).

The methodology adopted for both sites was loosely based on previous CI-led planning processes in Guatemala and Peru (Bonilla, 1997). Four distinct phases allowed participation at individual, sector, and multi-sector levels:

Individual interviews were conducted with local leaders from government, private sector and the civil society. The interviews provided a list of issues that were used as starting points for the sector focus group discussion that followed.

Sector focus group meetings were held with each major stakeholder group: government, private sector, civil society, and cruise lines. Each of these focus groups discussed the issues, identified priorities, and proposed strategic action lines and cooperation opportunities to implement them.

The core event of the process was a one-day *inter-sector stakeholder meeting*, in which all groups sat together and were challenged to seek a common ground. They were then

asked to develop collaboratively a detailed action plan, using as raw material the contributions of the focus groups. The workshop schedule was carefully designed and facilitated to ensure broad participation. Basic ground rules were established to maintain participants focused on the collaborative aspects of the process, and to ensure respectful exchanges when inter-sector conflict surfaced. The meeting provided validated consensus on priorities, strategic lines, and tactical actions to achieve them. They also designed two pilot projects to be started immediately. At the end of the meeting, a working group with representatives of each sector was formed, and agreed to prepare the final version of the Action Plan with the support of a facilitator.

The final planning phase was the *writing and public launch of the Action Plan* by the working group. The document presents the context, explains the process, and outlines the objectives, strategies and activities agreed upon. The public launch provides an opportunity for all sector participants to express their public support and commitment to the plan.

The pilot projects, which began to be implemented immediately, provided an early success in collaborative implementation of the Action Plan. They also helped consolidate the working group, not only as a consultative compact, but also as a joint implementation team.

The following underlying principles guided the participatory process:

Shared responsibility: It was crucial to acknowledge that all sectors share the responsibility for sustainable and responsible tourism development, that not a single stakeholder is solely responsible for managing negative impacts, and that each stakeholder has unique characteristics that complement the others.

Common Ground: The process focused on the common ground shared by all stakeholders, rather than emphasize their differences. Workshops and meetings were carefully sequenced and facilitated to ensure a positive dialogue. Issues and actions included in the plan reflected a broad consensus of priorities.

Immediate Action: Although longer-term objectives were formulated, the emphasis was on actions that could be taken in the short term, with mandates, networks and resources available to the participants. Pilot projects were chosen for immediate implementation using criteria of relevance, practicality, feasibility, inter-sector collaboration and probability of success within six months.

Case study 1: Cozumel, Mexico

According to MARTI, Cozumel is the number one cruise port call of the world. In 2006, approximately 2.6 million passengers visited this island, attracted by its rich natural and cultural heritage (MARTI, 2008). Although a welcome source of economic development, cruise ship tourism also presents challenges to manage potential environmental impacts on Cozumel's vulnerable coastal and marine ecosystems, in particular the coral reef. The large number of visitors has also high potential for social impacts on the small resident population of approximately 80,000 people (MARTI, 2008).

The participatory planning process was implemented under the auspices of the Municipality of Cozumel. Individual interviews with 60 local leaders were conducted in March and April 2007, and five focus group meetings were conducted in late April (CI, 2007).

The focus groups included 65 participants from the public sector, civil society, the private sector related directly to the cruise tourism (tour operators, shipping agents and dock managers) and the private sector with an indirect relationship with cruise tourism (other service providers, transport, shops, restaurants, and hotels). A focus group with cruise line representatives took place in Florida (CI, 2007). The focus groups identified up to 31 issues and organized them in four themes: a) increasing environmental awareness of cruise passengers, b) increasing environmental awareness of the local community, c) improving management of cruise ship passenger flows, and d) ensuring knowledge and application of standards. They also brainstormed a list of potential action items to address each of the issues.

The inter-sector stakeholder meeting took place in late May, with 40 participants. The meeting provided an opportunity for validating as a group the list of issues and action items proposed by the focus groups, and a few more were considered. Six small groups were formed, each including representation of each sector, to discuss more detailed actions. Individual voting allowed the group to select two joint pilot projects. Later, groups reassembled along sector lines to discuss concrete opportunities to contribute to the implementation of the pilot projects using existing resources, initiatives and networks.

To conclude the meeting, a working group was organized with volunteers representing all sectors involved. In the following six months, the working group, with support from CI consultants, completed the production of the final Action Plan document and implemented jointly the two pilot projects.

The Action Plan was launched publicly in January 2008 (GreenBiz, 2008). The document outlines ten recommendations organized under four strategic lines of action. Action items to implement each recommendation were also proposed (MARTI, 2008). Following is a summary of the plan:

<p>PROTECTING COZUMEL’S NATURAL HERITAGE:</p> <p>ACTION PLAN FOR THE SUSTAINABLE MANAGEMENT OF CRUISE PASSENGERS</p>
<p><i>STRATEGY I: Enhancing Environmental Awareness and Education of Cruise Ship Passengers, Tour Operators, Service Providers and the Local Community.</i></p>
<ol style="list-style-type: none"> 1. Establish a center for sustainable tourism training, certification and information. 2. Implement an environmental awareness campaign targeted to cruise ship passengers that emphasizes how they can help to protect Cozumel’s natural heritage. 3. Establish a center for sustainable tourism training, certification and information. 4. Implement an environmental awareness campaign targeted to cruise ship passengers that emphasizes how they can help to protect Cozumel’s natural heritage.
<p><i>STRATEGY II: Improving Management of Cruise Ship Passenger Flows.</i></p>
<ol style="list-style-type: none"> 5. Improve existing tourism infrastructure. 6. Alleviate high concentration and congestion of visitors at key sites.

7. Improve waste management on the island.
<i>STRATEGY III: Fostering Increased Protection for Cozumel's Reef System.</i>
8. Generate information to help decision-makers in government, private sector, civil society and the larger island community make informed decisions about environmental issues related to cruise ship visitation.
9. Encourage additional reef management practices to balance reef protection with increased visitation.
<i>STRATEGY IV: Promote Consistent Application and Enforcement of Laws & Regulations.</i>
10. Improve enforcement and coordination for consistent application of existing laws for environmental protection.

While the Action Plan outlines a medium-term approach, the working group also implemented immediately two joint pilot projects addressing environmental awareness of visitors, a theme deemed a priority by the focus group consensus.

The first project involved the joint production of “Visit Cozumel with Love”, a 30-second video presented to cruise ship passengers both on the ship and aboard tenders¹. This video welcomes tourists to Cozumel, emphasizing the value and fragility of its natural heritage, and reminds them of the importance of threading lightly on the island. The video will also serve as a cue for guides and other visitor management personnel to introduce the discussion of specific behavior guidelines to reduce visitor impact on Cozumel’s ecosystems. The second project involved the creation of an “environmental walkway”, a display of pictures along visitor entry points (docks, airport and malls), providing striking visuals of Cozumel’s natural heritage and encouraging responsible behavior to reduce visitor impact.

Encouraged with the early success, the Working Group decided to implement a third pilot project, a recycling campaign to manage solid waste generated by cruise ship tourists aboard tenders and other local tour operator facilities. This campaign was closely coordinated with a pre-existing municipal effort. It is estimated that the three

¹ The video was available at the time of writing at <http://www.youtube.com/watch?v=th0xqaAyFuQ>

pilot projects will reach up to 500,000 visitors during the first six months (CELB, 2008).

Case Study 2: Belize

Following the success of Cozumel’s planning process, a similar project was started in Belize, under the auspices of the Belize Tourism Board (BTB), and the financial support of the Oak Foundation and the Cruise Lines International Association (CLIA).

Cruise ship arrivals in Belize City, the only cruise ship port in the country, increased 500% between 2001 and 2002 (Matus, 2007). In 2005, over 800,000 cruise tourists visited the country, nearly three times its population. Belize also has the highest disembarkation rate in the Caribbean, about 85% of passengers disembark to visit barrier reef sites, as well as inland destinations featuring tropical forest and Maya sites (Matus, 2007). This rapid growth has overwhelmed the limited human and physical management infrastructure in the country, challenging the country’s ability to manage social and environmental impacts associated with cruise ship tourism.

The planning methodology was similar to the one followed in Cozumel, with slight modifications. Interviews and focus group meetings were held in July and August 2007, involving each major stakeholder group. Unlike Cozumel, a single private sector focus group included businesses that had either a direct or indirect relationship with cruise ship tourism. The inter-sector planning workshop was held in October 2007, using a streamlined methodology that resulted in a shorter meeting.

The action plan is still in draft form, but the meeting notes reflect three major action lines, and nine recommendations. The following table is a summary of the conclusions of the meeting:

<i>STRATEGY I: Enhancing Marine and Coastal Resource Use Management</i>
1. Develop and enact national mooring buoy policy and program.
2. Establish limits of acceptable change for high priority marine recreation sites.
3. Establish a zoning scheme for highly visited marine recreation areas.

STRATEGY II: Improving City Planning, Basic Tourism Infrastructure, and Management of Services/facilities for Cruise Ship Visitors.

4. Develop a tourism plan for Belize City area as part of the broader National Master Tourism Plan.
5. Implement draft Belize City tourism zone policy.
6. Establish a handicraft market for local vendors.
7. Restore historical buildings.

STRATEGY III: Fostering Adequate Site Monitoring and Compliance with Existing Regulations

8. Revive the Coastal Zone Management Authority & Institute.
9. Implement an environmental awareness campaign targeted to cruise ship visitors.

Following the Cozumel approach, a working group was established, and three pilot projects were designed. The first project will install mooring buoys in critical snorkeling sites of the Barrier Reef, seeking to address anchoring damage. It will also include the development of a jointly implemented maintenance program. The second project is a greening initiative for Belize City, aiming to generate green spaces in the areas visited by cruise ship tourists. Finally, the working group will develop an awareness video similar to the one produced in Cozumel, with the objective of improving cruise ship tourists' environmental awareness. Funding for these projects has been committed by the Belize Protected Areas Conservation Trust (PACT), and implementation is expected between April and December 2008 (Matus, 2008).

Belize held general elections on February 2008, resulting in a change of government. The new Minister of Tourism has embraced the continuation of this initiative (Matus, 2008).

Discussion

The participatory planning processes conducted in Cozumel and Belize followed the principles proposed by UNEP of involvement and consultation, and the guiding principles for social responsibility of the Cape Town Declaration regarding community involvement. However, the intention of the process was to go beyond involvement and

consultation, and transform stakeholders into joint planners and implementers, seeking to achieve “real participation”. The question is whether the case studies of Cozumel and Belize represent such real “participation”.

The World Bank Participation Sourcebook defines a “participatory stance” as the alternative to an “external expert stance”, and provides a useful list of characteristics that may be used to identify the point when a process goes beyond involvement and becomes participation (World Bank, 1996).

First, there is “social learning”. According to the World Bank, this is the process in which stakeholders learn how and why their behavior needs to change for a project to succeed, by discovering themselves, rather than by being told to do so. Social learning was evident in both the Cozumel and Belize processes. For example, the workshop provided a rare opportunity for cruise ship executives and members of the private sector not directly linked with cruise ship tourism to sit, plan and work together. The presence of scientists directly involved in marine protected area management provided unique opportunities to learn about the actual negative effects of uncontrolled diving and snorkeling on the reef. And the participation of elected officials highlighted for all participants the complexities of balancing competing interests to define policy.

Then there is “social invention”, where stakeholders invent new practices and institutional arrangements to achieve a project’s objectives. Again, social invention was evident in both processes. In Cozumel, thanks to the presence of a strong and charismatic local government, the steering committee took the shape of a formalized Working Group, with a public mandate and a very visible agenda. In Belize, given the uncertainty of the upcoming elections, the steering committee took a more ambiguous and less formalized shape, resembling more of a civic association with strong presence of the local private sector and the civil society. The strength of this grassroots base was probably a reason the incoming government had little resistance to adopt the initiative as its own, despite the very competitive election period. Social invention allowed the stakeholders design and agree on management structures that were a better fit with local culture and conditions.

Finally, there is “commitment”. Although many expert-driven planning processes have a validation phase, the World Bank recognizes that projects cannot rely on commitment obtained from stakeholders without a full understanding of what this commitment entails and being able to judge their ability to fulfill it individually and collectively. In these case study processes, however, commitment was integral to the selection of strategies and activities designed by the stakeholders. The ground rules of the inter-sector workshop required that responsibility to implement a specific action in the action plan could only be taken voluntarily by a stakeholder. All three characteristics proposed by the World Bank for participation were present in the case study process.

It has also been proposed that participatory processes allow planning conflict to be resolved directly by facilitated stakeholder participation, rather than by expert decision (Bonilla, 1997). In both processes there were several occasions where conflict over resource allocation, visitor management, and jurisdiction became apparent. The ability of the stakeholders to find alternative solutions leaning on their vast available expertise, and the collegial atmosphere that was created by the joint purpose, allowed for achieving a broad consensus on the strategies and activities included on the plan. Although some controversial activities proposed were not included in the final agreed version, none of the activities included are likely to face implementation resistance by the stakeholders involved.

Despite the advantages of a participatory approach, some pitfalls forewarned by the literature emerged during the process. The documents produced by the stakeholder group have limitations that would not have been present in a traditionally expert-designed plan. For example, there is no spatial analysis of issues and proposed interventions, there is no timeline showing the relationship of proposed activities, nor there is a significant attempt to provide a cost estimate of interventions, which would be useful for prioritizing activities with a limited budget. Addressing these limitations can be done within the participatory process, but would require an added layer of capacity building, and an increased time commitment by the stakeholders. The working group can also remedy these limitations in the future.

It is also likely that deeply ingrained power relationships influenced the final product. For example, in Cozumel it is probable that both the strong local government and the powerful cruise ship association exerted a strong influence on the final design. In Belize, it is also probable that the powerful local private sector had the strongest influence because external circumstances at the time of the workshop limited the participation of the two other local sectors. The public sector was facing the upcoming election, and the civil society was managing the unexpected crisis of the potential degazetment of a major protected area that week. However, the power relationship and distracting circumstances would also be present during an expert-driven planning process, and the final design would have reflected them independently of the planning stance adopted.

Conclusions and recommendations

The two case studies presented attempted to go beyond involvement and consultation to reach real “participation”. In both cases, stakeholders were not only involved and consulted, but they also became designers and implementers of a commonly agreed strategic plan. Using the World Bank definition of a “participatory stance”, and its list of characteristics to identify whether a process achieves “participation”, it is suggested that this objective was achieved in both cases.

Although the principles of local population involvement contained in UNEP’s sustainable development principles and the Cape Town Declaration’s Guiding Principles for Social Responsibility are valid and desirable, they represent a minimum acceptable standard. It is proposed that a participatory planning process, as opposed to a traditional expert-driven process, not only achieves these policy standards by default, but may also produce an improved likelihood of implementation success.

Although the technical results may not always compare to the quality obtained by an expert-driven process, participatory planning approaches may have significant advantages regarding the adoption of behavioral changes, the development of institutional conditions, and the development of stakeholder commitment essential for implementation success. Future planning processes must utilize participatory planning

techniques to incorporate, as possible, geographic, time, and funding parameters to the activity outlines.

These case studies show apparent success in designing plans with broad, explicit and public stakeholder support. The successful implementation of pilot projects also bodes well for the implementation phase. However, further research must be conducted to establish with empirical evidence if an increase in stakeholder participation beyond consultation and involvement actually has a measurable effect on implementation success, as compared with an expert-driven approach.

Planners facing a choice in future planning exercises are recommended to consider not only fulfilling a minimum standard of involvement and consultation, but attempt to achieve real “participation” through a participatory planning approach.

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