

**BASELINE ANALYSIS****Evaluation**

<b>Document title:</b>	Vol. 1 Task A - Analysis of the Institutional and Legal, Regulatory and Policy Framework Vol. 2 Task B - Analysis of demand and opportunities for tourism destination area development Vol. 3 Task C - Analysis of baseline conditions of spatial plans, infrastructure gaps and visitor attractions and facilities Vol. 4 Task D - Articulation of Environmental, Social, Socio-Economic and Cultural Heritage Opportunities and Constraints	<b>Date of review completion:</b>	9 May 2019
<b>Document date:</b>	22 March 2019	<b>Consultant name:</b>	AECOM
<b>Version number:</b>	n/a		

**Evaluation criteria**

- i) Satisfactory for public release: Has met all of TOR to a satisfactory level.
- ii) Adequate: Has met minimum requirements of TOR. Suitable for internal project management and approval system for consultant payments.
- iii) Work Required: Not suitable to meet payment requests – requires more work.
- iv) Substandard: Requires substantial amount of improvement against the TORs.
- v) Not Addressed and explain as appropriate.

This evaluation is in three sections:

- 1) Assessment Summary (page 3)
- 2) Part A against the terms of reference (page 6)
- 3) Part B against tasks by chapters of the draft report (page 28).

NOTE: Green highlight indicates previously advised comments from RIDA to the consultant.

<b>Section #1: ASSESSMENT SUMMARY:</b>	<b>Assessment</b>
<b>OVERALL RATING OF LOMBOK BASELINE ANALYSIS:</b>	<b>Adequate +</b>

In order to achieve a Satisfactory rating for the March 2019 edition, and thus enable publication, the following is required:

#### General

- i. All volumes should be subject to grammar, spelling, sense and consistency checks, referencing, acronym definitions and final proof-reading by a native English speaker or someone of similar ability.
- ii. A short overview of the material is required to stitch the four volumes together into a readable 'story' that identifies the issues each of the subsequent plans need to address, perhaps in the form of SWOT analysis. (The physical story is already well told in Vol 4). Please discuss content with RIDA at draft stage.
- iii. Key maps, as a minimum, need the KTA boundaries added.
- iv. Create a separate volume of maps at A3 size to make them easier to read: electronically the reader should be able to re-size maps for ease of reading.
- v. Part B of this review contains 354 detailed technical comments on the previous version: all need to be reviewed to either accept and update the March 2019 draft or be clear where later in the process they can be dealt with.

#### Task A: Vol 1. Analysis of the Institutional and Legal, Regulatory and Policy Framework

- vi. The Global Geopark and Biosphere Reserve draft management plans should be removed from Vol. 1, created as proper management plans and pursued to completion on a separate track to the Baseline Analysis.
- vii. Incorporate an assessment of the regulatory system, to determine to what extent it is functional, before the Summary (section 3.4) and update the Summary accordingly. This material can then be further developed as part of forming the 'Capacity Building Program'.
- viii. Review and update the material on Peraturan Mentari.
- ix. Update the discussion at chapter 3 of Vol 1 to include missing RTRW documents listed in Section #2 below.
- x. Include an Appendix under Task A that simply lists, by regulation type, the various regulations that have been reviewed: this needs to be a line by line listing so the reader can quickly ascertain the volume and type of regulation reviewed.
- xi. Establish a consistent map base, showing KTAs, for use throughout all four volumes. If this changes later then lead the reader through the rationale for the change.
- xii. At Vol. 1, para 1.2, confirm the baseline year and any assumptions the authors are making concerning if it is 2017 or 2018 selected.

#### Task B: Vol. 2 Demand and Opportunities for Tourism Destination Area Development

- xiii. Update the demographic discussion (chapter 2) to include, as a minimum, the number of households (which will be required to discuss basic services in Vol. 3 and to establish monitoring criteria for these services) and basic demographic structures.
- xiv. Add IP population size (if not able to provide hard numbers, make a justified assumption) and add to Fig. 4 in Vol. 4.
- xv. Section 4.1: it would help the reader if the discussion identified, if only in a broad sense, those sectors of the economy that are primarily tourism driven (presumably 'Trading, Food and Hotel').
- xvi. Expand the discussion at section 8.4 to provide a more in-depth comparison in terms of attractiveness and competitiveness as island tourism destinations.
- xvii. In relation to tourism contribution to local economy, ask in-house economists if they can produce more comprehensive report based on available data and expand as required. (e.g. simple IO Analysis).
- xviii. Include discussion on how many four- and five-star hotels there are and their locations.
- xix. Vol. 2. Page 161 – Capabilities and skills of local businesses and employees: expand with information that may be available from local educational & research institutions.
- xx. The discussion on tourism facilities (chapter 6) needs expanding (or cross-referencing) to include material on tourism quality assurance, skills and service levels, immigration facilities and clearance systems, tourism investment promotion and incentives, public/private partnerships and the role of the private sector.
- xxi. Augment the discussion at section 3.2 to include a more fulsome discussion of "linkages between the various sector of economy affecting and affected by tourism development". (See comments under b.2 in section #2 below).
- xxii. At section 7.2 I identify the key issues that are likely to hold back local businesses in grabbing new business from tourism growth.

#### Task C: Vol. 3 Analysis of baseline conditions of spatial plans, infrastructure gaps and visitor attractions and facilities

##### Task C.1 ...

- xxiii. The section on Planned New Development (1.2.5) does seem to contain any assessment of other development pressures that may impact on scenario development; this needs augmenting as the knowledge may impact on scenario development.
- xxiv. Ensure the map base used at section 1.2.7 (and subsequently) is consistent with a map base established at Vol. 1, which seems to be Fig. 38: at present these map bases are inconsistent.

**Section #1: ASSESSMENT SUMMARY:****Assessment**

- xxv. Accuracy and consistency checks needed throughout Vol 3, some examples.:
  - a. Check Table 19, Total Lombok Island is 102%.
  - b. Total forest area about 27% of Lombok area (Table 19), source JICA 2015. Not consistent, compare with Chapter 1.3.6. Forestry Area (page 104), total forest area in Lombok approximately 163 002 Ha (34,40%), source Environmental Agency of NTB Province, 2016).
  - c. Page 97, Table 15 refers to a “480” slope: explain what this means.
  - d. Page 101 says “... the water source in Lombok Island may have raw water potential ...”. Be clear: either there is or is not raw water potential, which needs to be considered in the light of climate change.
- xxvi. At section 1.4.1 in Vol. 3 include a map of the various listed sites of cultural significance.
- xxvii. Page 101 says “... the water source in Lombok Island may have raw water potential ...”. Be clear: either there is or is not raw water potential, which needs to be considered in the light of climate change.
- xxviii. Task C.1 (vii) - Areas of environmental concern and/or significance – requires further detail: see table below for specific comment.
- xxix. At section 1.4.1 in Vol. 3 include a map of the various listed sites.

## Task C.2 ...

*Analysis of connectivity*

- xxx. Include planned transport investments in the accessibility assessment at page 242.
- xxxi. Include map to illustrate the connectivity figures at page 249.
- xxxii. Add potential catchment population to Fig 130 (4hours direct flight) and cross link text to market discussion in Vol 2, para 5.7.

*Infrastructure*

- xxxiii. The technical infrastructure material is very dense and does not give the reader any sense of what it all means for tourism development, the KTAs and gaps to be filled for existing residents. This overview needs to be captured.
- xxxiv. Given the size of the infrastructure maps it is difficult to determine how complete they are and whether they provide enough information about current infrastructure (e.g. piped water supply - intake, treatment, production facilities, distribution networks, and other facilities such as IKK and non-piped water supply system such as water well, etc) as well as planned investments: review all maps and ensure they are all in English.
- xxxv. Check the target service levels used in the gap analysis, as they appear to be inconsistent with Peraturan Presiden No. 2 Tahun 2015; if inconsistent re-calculate the gaps.

*Transport*

- xxxvi. Include a statement about land availability in relation to the airport master plan.
- xxxvii. The discussion of cruise ship arrivals at page 315 needs expanding (or cross-referencing) to include material on cruise ship arrivals, passenger numbers, past trends and better clarity / focus on current facilities.
- xxxviii. At section 2.1.4.3 include a discussion on actual and potential demand for non-motorised transport, with reference to each KTA, and a broad discussion of those sections of road where pedestrian and bicycle traffic is concentrated in order to assess the need for dedicated lanes.
- xxxix. Include a statement about land availability for road schemes under Table 132 at page 369.
  - xl. A clearly identified ‘tourism relevant road network’, which updates the Project Appraisal Document, is missing. Section 2.1.4 on roads needs the addition of material that clearly defines road sections that are critical for tourism development in combination with a high percentage of tourism traffic.
  - xli. Add information on traffic composition on the key (tourism) road sections.
  - xlii. Draw out more explicitly the parameters to be used in traffic growth projection.
  - xliii. Add a short section on parking availability at destinations / beaches, with reference to the KTAs.
  - xliv. Update the Road Safety section (2.1.4.4) with information on the number of accidents and fatalities.
  - xlv. Add to section 2.1.5 on public transport a discussion of pricing, ticket packaging and ticket purchase, especially from a tourism perspective.
  - xlvi. Add to section 2.1.5 on public transport a discussion of the condition of bus terminals, bus stops, and the bus level of service: check number of rental cars on Lombok (table 141). (e.g. More information on the major bus terminals: exact location, lay-out, facilities, current (maintenance) condition, and capacity constraints if any).

*Drainage*

- xlvii. The mapping is too small to identify the drainage system: include larger plans.
- xlviii. Include a discussion (or cross-reference) on drainage issues resulting from tsunamis and heavy rainfall and how this may impact on tourism development.

**Section #1: ASSESSMENT SUMMARY:****Assessment***Water supply*

- xlix. Specify the national standard used and check to ensure for the key tourism areas access to sustainable water supply is defined and analysed as compliance with the SNI 3-7065-2005 standard.
  - I. The planned investment section at page 500 is thin: can this be expanded?
  - li. The discussion of water supply within the KTAs is thin and needs augmenting given these are the principal points of future investment. Include a description and give analysis about factors that play a significant role in shaping the existing condition. What are the gaps with relevant standards or masterplan, and what are the governing factors?
  - lii. Not clear if the water loss and peak hour period have been used in calculating the water supply gap: check and update if required.
  - liii. At page 500 draw together previous material with that on planned developments to form a conclusion on whether the planned developments will fully address any gaps. (Looking at table 209 and the text below, the reader does not have an idea if “improved cooperation” will fill that gap). The gap analysis needs to consider any sub-standard raw water sources identified earlier the section.

*Wastewater management*

- liv. At page 523 draw together previous material with that on planned developments to form a conclusion on whether the planned developments will fully address any gaps.
- lv. Include a discussion on treatment of industrial and commercial wastewater.
- lvi. Cross check wastewater demand figures with demand for water to ensure consistency: generally, wastewater is 80% of water demand.

*Solid waste*

- lvii. Although the material covers solid waste in each KTA, this is mostly at a kabupaten level. Revise the section to more explicitly focus on KTAs, including a description and analysis of existing conditions.
- lviii. Expand the discussion around table 248 to include waste generation by day and overnight visitors; relate to KTAs as well.
- lix. The maps showing collection systems are too small to read and to adequately show the coverage area, especially by KTA; bigger scale map needed.
- lx. Add material on collection fees.
- lxi. At page 556 draw together previous material with that on planned developments to form a conclusion on whether the planned developments in solid waste will fully address any gaps.

*Case studies*

- lxii. At the end of section 3.1 provide more detailed and practical explanation of best practices in dealing with tourism challenges and opportunities during the various TALC stages and relate these to the situation on Lombok.

*Opportunities and constraints*

- lxiii. Include the presence of Masyarakat Adat, landownership issues, and historical conflicts.

**Task D: Vol. 4 Articulation of Environmental, Social, Socio-Economic and Cultural Heritage Opportunities and Constraints**

- lxiv. Include a very short chapter four consisting of a simple diagram and short description that shows how all this material feeds into scenario development.
- lxv. Print the following figures on a whole A4 page: 18, 75, 77, 78, 80 and the new base map.
- lxvi. At section 2.1.2 of Vol 4 make explicit the regulations relied upon by cross-referencing to Vol 1.
- lxvii. In a new appendix to Vol 4 provide the workings and scores that support creation of Fig 19 on page 75.
- lxviii. Before section 3.4 add a short analysis that identifies the most severe impacts across the KTAs and relate the discussion to chapter 2.
- lxix. At table 16 expand the Preliminary Recommendation column to be more detailed in relation to social impacts and their avoidance, as done in table 15.
- lxx. At page 70 review statement about multi-criteria assessment as this does not appear to be an MCA.
- lxxi. In chapter three clearly draw out areas with the KTAs that should not be developed – see mapping earlier in chapter 3 that should be applied to the figures in section 3.2.
- lxxii. At the end of section 3.1 provide a revised base map for future use that takes account of the discussion (over all four volumes) and which clearly identifies no development areas at KTA level.

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Reader's note: The comments in section #2 provide further detail as appropriate.

<b>OVERALL SUITABILITY ASSESSMENT:</b>		Work required	<b>Adequate +</b>
➤	Readability and general accuracy: can a lay reader easily follow the document; is the document easy to read; are there spelling or grammatical errors; are there obvious errors of fact; are there words, phrases or sections that do not make sense.	Work required	Adequate
➤	Does the report address the terms of reference, which includes providing relevant information in a manner which is understandable to the lay reader and provides an analysis of that information when required?		Adequate (+)
		Task A	Substandard
		Task B	Work required
		Task C	Work required
		Task D	Work required
➤	Does the report contain enough information to allow the work to proceed to the next task, being preparation of growth projections and development scenarios?	Adequate	Satisfactory
➤	Does the report contain all information necessary to populate the Management Information System and enable project evaluation as set-out in the Pedoman Umum?	Work required	Satisfactory

Documents dated 12 December 2019

Documents dated 22 March 2019

**ASSESSMENT AGAINST PREVIOUS GENERAL COMMENTS:**

a	The lack of Global Geopark and/or Biosphere Reserve (draft) management plan(s) at Task A is an omission.	➤ Substandard ... <ul style="list-style-type: none"> <li>○ In order to achieve a Satisfactory rating for the Baseline Analysis, and thus enable publication of it, these two areas require separate draft management plans that should be pulled from Vol. 1 and treated and processed as separate documents. They should be run in parallel with scenario development and selection, as task E may necessitate changes to the draft management plans. After that the management plans could take a different path to Government approval – please discuss.</li> <li>○ The Consultant should note that removal of these draft plans from the Baseline Analysis does not absolve the Consultant from completing the draft plans to a satisfactory standard.</li> </ul>
b	This report needs to be reviewed against the terms of reference to ensure all requirements are being met, including in sufficient detail to populate the project's forthcoming Management Information System.	➤ Satisfactory <ul style="list-style-type: none"> <li>⊖ Any missing material can be identified as the MIS develops and requested of the consultant for direct input into the MIS.</li> </ul>
c	The context and background to the ITMP (including the Tourism Destination Area and Key Tourism Areas), as introduction to the overall documents in Volume 1, deserves more attention.	➤ Satisfactory
d	Information and data should consistently be related to the Integrated Tourism Development Plan, Tourism Destination Area and Key Tourism Areas, as the case requires: it needs to tell a 'story' for the lay reader.	➤ Satisfactory
e	In addition to an explanation of the ITMP preparation flow, a clear tourism competitiveness / strategic framework will assist in putting the Baseline Analysis into context and provide the rationale and process for the baseline study and where it fits in the overall ITMP preparation.	➤ Satisfactory
f	It is difficult to get an overall picture and flow of the document due to the sheer volume of information presented and the fact that it is divided in four volumes. It would be sensible to repackage the documents into a single core volume of main findings and to attach analytical and factual information that is largely extracted from existing sources as Appendices. Cross-referencing will be essential.	➤ Adequate <ul style="list-style-type: none"> <li>○ Although the Baseline Analysis lacks a simple unifying 'story' line there is more than enough material in the four volumes to construct this at the start of Task E and in doing so identify the issues the forthcoming plans need to address.</li> </ul>

	Documents dated 12 December 2019	Documents dated 22 March 2019
		<ul style="list-style-type: none"> <li>○ In order to achieve a Satisfactory rating, and thus enable publication, the Consultant needs to prepare an overview which may take the form of a written document or the material to be used in developing scenarios with stakeholders may be appropriate – please discuss. A SWOT analysis may be appropriate.</li> </ul>
g	The absence of a tourism strategic framework has the danger of missing some important tourism information like marketing policies / strategies / plan / practices; more detailed assessment of tourism quality assurance, skills and service levels; immigration facilities and clearance systems; tourism investment promotion and incentives; public/private partnerships; private sector role and organisation, etc.	➤ Satisfactory
h	Having the analysis of Opportunities and Challenges divided per volume is difficult to follow and detracts from an overall grasp of opportunities and challenges. See point above, regarding condensing core information related to tourism: consider combining all summaries of opportunities and challenges into a single summary. This should flow from the strategic framework.	➤ See comment (f) above
i	<p>Readability - It is appreciated the report is a draft. The final version will need a single editor to work through the Baseline Analysis to ensure internal integrity of the document and, inter alia, look at:</p> <ul style="list-style-type: none"> <li>➤ grammar</li> <li>➤ spelling</li> <li>➤ sources and references of documents from which findings are derived are properly referenced: improve referencing, footnotes and add a list of references</li> <li>➤ check consistency of table and figure headings</li> <li>➤ ensure all maps, figures and diagrams are easy to read, have a legend and north point when required.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Adequate <ul style="list-style-type: none"> <li>○ Although there are significant improvements on grammar, spelling, sourcing / referencing etc. the documents still contain issues of spelling, grammar and sense. All volumes should be subject to proper checks and final proof-reading by a native English speaker or of similar ability.</li> </ul> </li> </ul>
	Baseline date and data currency: please ensure data is up-to-date by including 2018 material including, inter alia, number of tourists to Lombok, attractions, Mt Rinjani access roads, human resource needs at Mandalika. Consider if all data can be updated to a consistent 2018 baseline (including population) in order to provide a direct launch platform in the first five-year plan period of 2019-2023.	<ul style="list-style-type: none"> <li>➤ Satisfactory <ul style="list-style-type: none"> <li>○ Noted that new material not available until May 2019 which can then be incorporated into the Baseline Analysis and/or MIS.</li> </ul> </li> </ul>

## Section #2

# PART A

## EVALUATION MATRIX AGAINST TASKS

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
<b>B. Analysis of demand and opportunities for tourism destination area development</b>						
TASK OVERVIEW		TOR requirement partially met	<ul style="list-style-type: none"> <li>➤</li> <li>➤ Employment growth trends: not discussed; add.</li> <li>➤ Potential economic growth: the discussion has a tourism specific focus to it. While the project is a tourism driven project, this section needs to place a discussion of tourism more firmly in the wider economy. This is, in part, is to see if any tourism driven infrastructure might also benefit a wider outcome.</li> <li>➤ In addition, need a deeper understanding of the investment climate. BKPM will facilitate discussions at the Consultant's request.</li> <li>➤ Mandalika and Global Hub: see Task C below.</li> <li>➤ Capabilities of local businesses to play an active role: very thin discussion that needs augmenting.</li> <li>➤</li> </ul>	<ul style="list-style-type: none"> <li>➤ Adequate</li> <li>○</li> <li>○</li> <li>○</li> <li>○</li> <li>○</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>➤</li> <li>○ Done</li> <li>○ Done</li> <li>○ Done</li> <li>○ Done</li> <li>○ Done</li> <li>○ Done</li> </ul>	<ul style="list-style-type: none"> <li>➤</li> <li>○ ECON</li> <li>○ ECON</li> <li>○ ECON</li> <li>○ ECON</li> <li>○ ECON</li> <li>○ ECON</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
					research institutions.	
			<ul style="list-style-type: none"> <li>➤ The Global Tourism Trends introduction provides a good context to launch the discussion from.</li> </ul>		<ul style="list-style-type: none"> <li>○</li> <li>○ Good – includes ASEAN destination relationship.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>➤ TOR requirements not met regarding a demand-based and integrated approach to developing growth concepts: the Baseline Analysis report should demonstrate how data feeds into a demand-based model.</li> </ul>		<ul style="list-style-type: none"> <li>○ See para. 5.7</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>➤ Throughout, the report does not meet the TOR, which requires: “Assemble and review information on domestic and foreign visitors and related accommodation, facilities, and attractions, past visitor trends and projected growth, and related demand for new tourism enterprises and services with particular emphasis on the Market Analysis and Demand Assessment.”</li> </ul>	☹	<ul style="list-style-type: none"> <li>○ Addressed: Refer Vol 2, Chapter 5, starts page 111 – future visitor market demand on page 134.</li> <li>○ Already refers to Lombok Market Analysis &amp; Demand Assessment. See page 138 – also the “Related demand for new tourism enterprises and services” will be elaborated on Task E.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>➤ Chapter 8 needs to be more rounded and identify sectors other than tourism (if any) that might have growth potential.</li> </ul>	<ul style="list-style-type: none"> <li>○ See expanded chapter 3.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ Addressed: Now previous Chapter 8 becomes Chapter 9 – referred to in macro-economic factors on page 61, 67 – should be also referred to in the summary.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>➤ Discussion of demand for new tourism opportunities would benefit from a qualitative discussion</li> </ul>	<ul style="list-style-type: none"> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ This assessment can be incorporated into Task E.</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
				drawing on the market analysis, attractions (missing) and projected growth trends (missing).	<ul style="list-style-type: none"> <li>○ Consider relevant information in MADA.</li> <li>○</li> </ul>	
			<ul style="list-style-type: none"> <li>➢ It would help if the Introduction (for all volumes) clearly stated the baseline date. Logically this is 31 December 2018 as the TOR specifies projection periods starting 2019, though the report seems to take 2017 as the base year. A qualifying statement could be expected noting how data relate to the baseline date.</li> </ul>	<ul style="list-style-type: none"> <li>○ At Vol. 1, para 1.2, confirm the baseline year and any assumptions the authors are making concerning if it is 2017 or 2018 selected.</li> <li>○ Consider impacts of the 2018 earthquake.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>➢ It would help if the Introduction to each volume contained a map showing the Tourism Destination Area and Key Tourism Areas as a reminder for the reader as to spatial area covered.</li> </ul>	<ul style="list-style-type: none"> <li>○ Although not all maps require TDA and KTA boundaries, some of the more critical ones are missing these, in particular the one at page 200 of Vol. 2 as it is here that the report may need to redefine the KTA boundaries.</li> <li>○ To achieve a Satisfactory rating the key maps, as a minimum, need the KTA boundaries added.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
			<ul style="list-style-type: none"> <li>○ Cross-reference to other parts of the Baseline Analysis where appropriate or consider a different structure for the Baseline Analysis with a short first volume that 'tells the story' (e.g. the analysis) and is supported by an extensive second volume of facts and figures. Cross-referencing is essential in either case.</li> </ul>	<ul style="list-style-type: none"> <li>○ See Overall Assessment, comment 'f'.</li> <li>○ Over 1,000 pages in the report so far: more cohesion encouraged amongst individual section writers to cross-reference.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done. Baseline overall summary has been made and it make easier to understand the context f the baseline analysis</li> </ul>	<ul style="list-style-type: none"> <li>○</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
b.1	Assemble and review information on population (including ethnic minorities, vulnerable groups, Indigenous Peoples (IPs)) and employment growth trends, including temporary residents (visitors) and in-migration of job seekers.	TOR requirement partially met	<ul style="list-style-type: none"> <li>➤ A solid and well-structured discussion that mostly responds to the TOR.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Adequate               <ul style="list-style-type: none"> <li>○ See comments on population below for basis of this assessment.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>➤ Done</li> </ul>	<ul style="list-style-type: none"> <li>➤ ENV</li> </ul>
			<ul style="list-style-type: none"> <li>➤ Chapter 8 summarises constraints and opportunities by TDA and Regency, which is good.</li> </ul>			
			<ul style="list-style-type: none"> <li>➤ The chapter should be extended to give guidance on growth rates, etc that might be applied in the forthcoming projections (Task E).</li> </ul>	<ul style="list-style-type: none"> <li>○ See section 5.7 for growth rates.</li> </ul>	<ul style="list-style-type: none"> <li>○ See section 5.7 for growth rates.</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>
			<ul style="list-style-type: none"> <li>➤ Would be good to make a table of tourism-specific training facilities and their capacities.</li> </ul>	<ul style="list-style-type: none"> <li>○ Page 166, type of tourism-specific training facilities but not yet the capacities; in preparing the 'Capacity Building Program', refer to ISED document from Bappenas &amp; GIZ.</li> </ul>	<ul style="list-style-type: none"> <li>○ Refer to chapter 4.3 about workforce and employment and chapter 7 about capabilities and skills of local business</li> <li>○ See Section 4.3.4.2.1.</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>
			<ul style="list-style-type: none"> <li>➤ At 4.2.5 there is a rather vague expression of demand for qualified tourism workers, no</li> </ul>	<ul style="list-style-type: none"> <li>○ The vague phrase has been removed.</li> </ul>	<ul style="list-style-type: none"> <li>○ See section 4.3.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY	
			12 December documents	22 March 2019 documents			
				indication of qualifications and types of skills required/in demand.	<ul style="list-style-type: none"> <li>○ Could refer to local labour unit data and also refer to ISED document from Bappenas &amp; GIZ.</li> </ul>		
				➤ Regarding social problems data in NTB Province, is there any information per district; what would be the implications and opportunities for tourism development?	<ul style="list-style-type: none"> <li>○ Refer: Vol 2, page 93, Table 55</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>	
	Population	19-32 127-136		<p>a. In general, this section presents a comprehensive baseline. However, a lot of inaccuracies and inconsistencies remain indicating a lack of quality control.</p> <p>b. Discussion is solely in terms of total numbers: no breakdown in to age/sex divisions or factors which may have driven population changes (e.g. migration, birth rates, mortality, occupation, dependency ratio, etc.)</p> <p>c. There are some % growth spikes in the data that could usefully be explained. Year 2014 shows a sudden peak in population growth: this asks for an explanation.</p> <p>d. Data and analysis are enough to predict the growth of population as one variable for demands and opportunities of tourism development indicators. Base year is 2017: figures could easily be projected to end 2018 using supplied CAGR.</p> <p>e. See note in task overview about maps.</p> <p>f. Discussed by whole island and regency.</p>	<p>a. -These omissions remain but can be addressed as part of preparing the <i>Phased integrated infrastructure and services development plan</i>; earlier attention is preferred: see comments at Part B below. The number of households is missing, which will be required to discuss basic services in Vol. 3 and to establish monitoring criteria for these services: this must be included in the Baseline Analysis refer to Part B for more detail.</p>	<ul style="list-style-type: none"> <li>○ See Chapter 2 page 26.</li> <li>○ See Chapter 2 page 27.</li> <li>○ The growth rate data was collected from a provincial level and may have been interpreted from the national population projection research. We have not found any evidence that BPS had changed their methodology in 2015.</li> <li>○ Refer page 38, section 2.2 Data Limitation – difficult to get official data – but still only population and density included.</li> <li>○ Done: see chapter 5.</li> <li>○ The addition of maps showing population growth is good.</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON and ENV</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY	
			12 December documents	22 March 2019 documents			
				g. Population change figures for key tourism areas is helpful.			
	Ethnic minorities	70-72 127-136		<ul style="list-style-type: none"> <li>➤ Identified.</li> <li>➤ Ethnic minorities not specifically mentioned only mentioned that the Balinese are the second tribe (10% population) that can be found in several sub-districts on the island of Lombok.</li> </ul>	<ul style="list-style-type: none"> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ See Section 4.7.2</li> <li>○ See from pages 94 – 102 and in the Consultant's "Review &amp; Action" sheets, item 1c.</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>
	Vulnerable groups	67-70 127-136		<ul style="list-style-type: none"> <li>○ Discussion on poverty and social issues.</li> </ul>	<ul style="list-style-type: none"> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ See pages 90 – 94 102 and in the Consultant's "Review &amp; Action" sheets, item 1d.</li> </ul>	<ul style="list-style-type: none"> <li>○ WNV</li> </ul>
	Indigenous Peoples (IPs)	72-78 127-136		<ul style="list-style-type: none"> <li>○ The indigenous people data is available: indigenous people registered by GOI and by AMAN and identified by ESMF. Also mentioned the indigenous people presence within the priority in tourism area. <b>But the total number of indigenous people not mentioned.</b> Ip's data written in a narrative manner and not equipped with the indigenous people's map. For completing screening processes of IPs need further data such as: the number of IP's to be affected, customary land rights and traditionally controlled natural resources, livelihood data and cultural, cultural and integrity communal, health conditions, knowledge of IPs and traditional institutions.</li> </ul>	<ul style="list-style-type: none"> <li>○ Add IP population size (if not able to provide hard numbers, make a justified assumption) and add to Fig. 4 in Vol. 4.</li> </ul>	<ul style="list-style-type: none"> <li>○ See pages 103 – 110.</li> <li>○ Data is available but not detail so several data including IP population data are not complete/ limited.</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>
	Employment growth trends	127-136		<ul style="list-style-type: none"> <li>a. No specific mention in the report.</li> <li>b. Any indication of employment in tourism?</li> </ul>	<ul style="list-style-type: none"> <li>a. The Consultant's "Review &amp; Action" sheets, item 1f notes there is no data on</li> </ul>	<ul style="list-style-type: none"> <li>○ Done See Section 4.3.4.2.</li> <li>○ Done, See paragraph 5 of</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
			<ul style="list-style-type: none"> <li>c. What about job seekers in the tourism sector?</li> <li>d. 4.3.1 explains decline in unemployment due absorption in the informal sector: more explanation about the structure and employment size of formal and informal sectors is needed.</li> </ul>	<ul style="list-style-type: none"> <li>employment growth trends.</li> <li>b. See section 4.1. It would help the reader if the discussion identified, if only in a broad sense, those sectors of the economy that are primarily tourism driven (presumably 'Trading, Food and Hotel').</li> <li>c. Lack of official data about job seekers noted.</li> <li>d. Lack of data noted.</li> </ul>	Section 4.1 (page 81).	
	Temporary residents (visitors)	127-136	<ul style="list-style-type: none"> <li>o Explained in the report especially in relation to education and gender; generally, they have not got jobs</li> </ul>	<ul style="list-style-type: none"> <li>o No change</li> </ul>	<ul style="list-style-type: none"> <li>o Data is not available</li> </ul>	<ul style="list-style-type: none"> <li>o ECON</li> </ul>
	In-migration of job seekers	65 127-136	<ul style="list-style-type: none"> <li>o Mentioned that the data is not available.</li> </ul>	<ul style="list-style-type: none"> <li>o No change</li> </ul>	<ul style="list-style-type: none"> <li>o Data is not available</li> </ul>	<ul style="list-style-type: none"> <li>o ECON</li> </ul>
b.2	Assemble and review information on all areas of potential economic growth, such as agricultural production, fisheries, food processing, commercial enterprises, industry, and services including tourism and travel, to identify and assess the linkages between the various sectors of the economy affecting, and affected by, tourism development in the Tourism Destination Area.		TOR requirement partially met	<ul style="list-style-type: none"> <li>o Adequate</li> <li>o Expand the discussion at section 8.4 to provide a more in-depth comparison in terms of attractiveness and competitiveness as island tourism destinations.</li> <li>o Augment the discussion at section 3.2 to include a more fulsome</li> </ul>	<ul style="list-style-type: none"> <li>o Done. More detail explanation and analysis are available in Vol 3/Task C or will be provided in the next stage.</li> </ul>	<ul style="list-style-type: none"> <li>o ECON</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
				discussion of “linkages between the various sector of economy affecting and affected by tourism development”. (See comments below).		
			<ul style="list-style-type: none"> <li>Uses location quotient to identify potential growth sectors.</li> </ul>		Done	ECON
			<ul style="list-style-type: none"> <li>Would benefit from a qualitative discussion to supplement the quantitative analysis.</li> </ul>	<ul style="list-style-type: none"> <li>Limited qualitative discussion / elaboration from the table, especially concerning “linkages between the various sector of economy affecting and affected by tourism development”. Applies to all sectors..</li> </ul>	<ul style="list-style-type: none"> <li>Done, See Section 3.2.7</li> </ul>	<ul style="list-style-type: none"> <li>ECON</li> </ul>
			<ul style="list-style-type: none"> <li>How does Lombok compare to other areas of Indonesia and the region?</li> </ul>	<ul style="list-style-type: none"> <li>Now compared to Bali requires more in-depth comparison in terms of attractiveness and competitiveness as island tourism destinations.</li> </ul>	<ul style="list-style-type: none"> <li>Done. It has been discussed in Vol 3/Task C</li> </ul>	<ul style="list-style-type: none"> <li>UD</li> </ul>
			<ul style="list-style-type: none"> <li>Fig 8: GDP contribution: only some sectors indicated.</li> </ul>	<ul style="list-style-type: none"> <li>Yes, but limited identification only for 1 sector (Accommodation and F &amp; B Services).</li> </ul>	<ul style="list-style-type: none"> <li>Limited data because data not divided to detailed sector.</li> </ul>	<ul style="list-style-type: none"> <li>ECON</li> </ul>
			<ul style="list-style-type: none"> <li>Any indication of GDP contribution of tourism?</li> </ul>	<ul style="list-style-type: none"> <li>In relation to tourism contribution to local economy, ask in-house economists if they</li> </ul>	<ul style="list-style-type: none"> <li>Done, analysis is available in Vol 2/Task B but it not detail because limited data</li> </ul>	<ul style="list-style-type: none"> <li>ECON</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY	
			12 December documents	22 March 2019 documents			
				<ul style="list-style-type: none"> <li>o Add a description of unique customs that may appeal to tourism and to what extent are these communities open to receiving tourists?</li> </ul>	<ul style="list-style-type: none"> <li>o</li> </ul>	<ul style="list-style-type: none"> <li>o Addressed: See page 99 – 102</li> </ul>	<ul style="list-style-type: none"> <li>o ECON</li> </ul>
				<ul style="list-style-type: none"> <li>o -</li> </ul>	<ul style="list-style-type: none"> <li>o Please put a legend for pie chart in Figure 12..</li> </ul>	<ul style="list-style-type: none"> <li>o Done</li> </ul>	<ul style="list-style-type: none"> <li>o</li> </ul>
	Agricultural production	33-56 127-136		<ul style="list-style-type: none"> <li>a. No qualitative discussion which would have contributed to the richness of discussion.</li> <li>b. Chapter 8 provides a useful overview through a constraints and opportunities analysis. The flavour of the discussion is focussed on 'accommodation, food and beverage' and its ability to drive growth; more attention is need on potential competing sectors to enable a judgment as to whether another, non-tourism sector, should be the focus of development.</li> <li>c. Discussion by island and regency.</li> <li>d. Identifies principal industry sectors through statistical analysis, including location quotients.</li> </ul>		<ul style="list-style-type: none"> <li>a. New section 3.1.1 added: see also section 3.2.</li> </ul>	<ul style="list-style-type: none"> <li>b. ECON</li> </ul>
	Fisheries	33-56 127-136		<ul style="list-style-type: none"> <li>➤ As for Agricultural production</li> </ul>	<ul style="list-style-type: none"> <li>o See general comments above.</li> <li>o .</li> </ul>	<ul style="list-style-type: none"> <li>o Needs fuller discussion relating fisheries to tourism and fisheries potential for economic growth.</li> </ul>	<ul style="list-style-type: none"> <li>o ECON</li> </ul>

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					Page 68 shows fisheries in the 'stagnant' quadrant which seems odd for an island with tourism growth potential	
Food processing	33-56 127-136		➤ As for Agricultural production	<ul style="list-style-type: none"> <li>○ See general comments above.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ Needs fuller discussion relating food processing to tourism and fisheries for economic growth. Explain how this relates to material at para. 3.2.6/7.</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
Commercial enterprises	33-56 127-136		➤ As for Agricultural production	<ul style="list-style-type: none"> <li>○ See general comments above.</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○ Lacks discussion of growth prospects by firm size and how these different sizes might impact on local employment.</li> <li>○ Discussed in Location Quotient/Basic and Non-Basic sectors analysis, however could be further elaborated in this section.</li> </ul>	<ul style="list-style-type: none"> <li>○</li> </ul>
Industry	33-56 127-136		➤ As for Agricultural production	<ul style="list-style-type: none"> <li>○ See general comments above.</li> <li>○ Presumably links back to fisheries and food processing: draw out links if any. What does the 73% include?</li> <li>○ Lacks discussion of growth prospects and how these different industries might impact on local employment.</li> <li>○ Tie terminology to paras. 3.2.6/7 is</li> </ul>	<ul style="list-style-type: none"> <li>○ Added relations to tourism sector.</li> <li>○ Discussed in Location Quotient/Basic and Non-Basic sectors analysis.</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>

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	Services including tourism and travel	33-56 127-136		<ul style="list-style-type: none"> <li>➤ As for Agricultural production</li> </ul>	<ul style="list-style-type: none"> <li>○ The comment about the role of Education is good and helpful: the other sectors should have similar insights as for the service sector.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done</li> <li>○ ECON</li> </ul>
	Identify and assess the linkages between the various sectors of the economy affecting, and affected by, tourism development in the tourism destination area.	33-56 127-136		<ul style="list-style-type: none"> <li>➤ pg. 45+ uses Location Quotient as basis of discussion.</li> <li>➤ pg. 51 brings the discussion together and identifies which sectors of the economy have growth opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>○ See chapter 3.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done</li> <li>○ ECON</li> </ul>
b.3	Assemble and review information on domestic and foreign visitors and related accommodation, facilities, and attractions, past visitor trends and projected growth, and related demand for new tourism enterprises and services with particular emphasis on the Market Analysis and Demand Assessment study commissioned by the World Bank Group under a separate contract ( <a href="http://bpiw.pu.go.id/uploads/20170302_Lake_Toba_Market_and_Demand_Assessment.pdf">http://bpiw.pu.go.id/uploads/20170302_Lake_Toba_Market_and_Demand_Assessment.pdf</a> ).		TOR requirement partially met	<ul style="list-style-type: none"> <li>a. Discussion of attractions could be expanded in chapter 3 to provide a discussion / summary of what attracts tourists to Lombok; cross-reference to other parts of the Analysis.</li> <li>b. No discussion of visitor projections; could be done under Task E (projections) but would not know impact of Mandalika and Global Hub in advance, which is preferable.</li> <li>c. Discussion of demand for new tourism enterprises through location quotients: qualitative discussion would enrich this.</li> <li>d. For each trend highlighted, what are the implications for the tourism forecasts and the ITMP? Do any of the trends mentioned here result in a re-evaluation of the Demand Assessment forecasts?</li> </ul>	<ul style="list-style-type: none"> <li>➤ Satisfactory</li> </ul>	<ul style="list-style-type: none"> <li>➤</li> </ul>

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				<ul style="list-style-type: none"> <li>e. Provide a definition of "hotel" and "star-rated" vs. "non-star-rated".</li> <li>f. Breakdown of number of hotels and rooms by star-grading and type required.</li> <li>g. Section 6 provides a factual overview of capacity; this should be relative to competitor destinations in Indonesia and region, especially Bali.</li> <li>h. Summary discussion needed regarding accommodation performance and capacity.</li> <li>i. Add information on tourist attractions/ objects/ sites/ intangible attractions/ heritage/ folklores, etc</li> </ul>			
	Domestic visitors	79-100 127-136		<ul style="list-style-type: none"> <li>➤ Describes visitors (domestic and foreign) in growth, country of origin, and point of entry.</li> <li>➤ Described by NTB Province and 5 (five) regencies/cities in Lombok.</li> <li>➤ Extensive and solid discussion.</li> </ul>		Done	ECON
	Foreign visitors	79-100 127-136		<ul style="list-style-type: none"> <li>➤ Describes distribution of star and non-star hotel in Lombok for 5 regency/city, growth of hotels and rooms, the hotel's performance (helpful to have a statement/analysis on what the impact/issues arise from the stated occupancy rates).</li> <li>➤ Maps are good addition.</li> <li>➤ Describes distribution of star and non-star hotel in Lombok for 5 regency/city, growth of hotels and rooms, the hotel's</li> </ul>	<ul style="list-style-type: none"> <li>○ It would help to know how many four- and five-star hotels there are and their locations.</li> </ul>	<ul style="list-style-type: none"> <li>○ Identified their locations in page 187 (Section 6.1.2) but do not know the official number of how many.</li> </ul>	ECON

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			12 December documents	22 March 2019 documents			
				performance (helpful to have a statement / analysis on what the impact/issues arise from the stated occupancy rates).			
	Related accommodation	101-123 127-136		<ul style="list-style-type: none"> <li>➢ Describes facilities such as MICE, food and beverage, retail, travel agent and Tourism Information Services, spa and salon, financial service include ATM, laundry, barbershop, car/motor rental, internet.</li> <li>➢ Maps are good addition.</li> </ul>	Done	ECON	
	Facilities	101-123 127-136		<ul style="list-style-type: none"> <li>➢ No specific mention under Task B: generally dealt with under Tasks A and C. Cross-reference needed.</li> <li>➢ Chapter 3 could be expanded to provide a discussion/summary of what attracts tourists to Lombok; cross-reference to other parts of the Analysis.</li> </ul>	<ul style="list-style-type: none"> <li>○ The discussion on tourism facilities (chapter 6) needs expanding (or cross-referencing) to include material on tourism quality assurance, skills and service levels, immigration facilities and clearance systems, tourism investment promotion and incentives, public/private partnerships and the role of the private sector.</li> </ul>	<ul style="list-style-type: none"> <li>○ See Section 4.3.</li> <li>○ Added a new Section 6.7.</li> <li>○ Added a new Section 3.4.3.1 Foreign Investment Promotion and Incentives, information based on MADA.</li> <li>○ See Section 4.3.4.2.4 on private sector roles in supplying workforce demand, and limited mentions of private sector development.</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>
	Attractions	-		<ul style="list-style-type: none"> <li>➢ Describes visitors (domestic and foreign) in growth, country of origin, and point of entry.</li> </ul>	<ul style="list-style-type: none"> <li>○ Done</li> <li>○ Projection and other chapters will be discussed in next stage</li> </ul>	ECON	

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			<ul style="list-style-type: none"> <li>➤ Described by NTB Province and 5 (five) regencies/cities in Lombok.</li> <li>➤ Nothing on projected growth.</li> </ul>			
Past visitor trends and projected growth	79-100 127-136		<ul style="list-style-type: none"> <li>➤ pg. 45+ uses Location Quotient as basis of discussion.</li> <li>➤ pg. 51 brings the discussion together and identifies which sectors of the economy have growth opportunities.</li> <li>➤ Would benefit from a qualitative discussion drawing on the market analysis, attractions and projected growth trends.</li> <li>➤ Under Task C the source of growth for Mandalika is questioned: this is where that question should be answered.</li> <li>➤ Under Task C the Bandar Kayangan Global Hub is referred to: where is the growth to support this port development coming from?</li> <li>➤ What are the implications for Lombok if Mandalika and the Global Hub, separately and jointly, become realities?</li> <li>➤ TOR requirements not met regarding a demand-based and integrated approach to developing growth concepts. When examining the Baseline Analysis report, the consultant should be asked to demonstrate how their data feeds into a demand-based model.</li> </ul>		<ul style="list-style-type: none"> <li>○ Done</li> <li>○ See Section 8.3.</li> <li>○ See Section 4.3.4.2.2, which discusses employment demand projection in Mandalika. However, a main section for the effects of Mandalika could be added if there should be a discussion.</li> <li>○ Limited data and it make the analysis is limited.</li> </ul>	ECON
Related demand for new tourism enterprises and services with particular emphasis on the Market	45-51 127-136		<ul style="list-style-type: none"> <li>➤ Describes visitors (domestic and foreign) in growth, country of origin, and point of entry.</li> </ul>	<ul style="list-style-type: none"> <li>○ Needs more assessment of whether additional</li> </ul>	<ul style="list-style-type: none"> <li>○ See Section 6.1.1 in regards to Accommodation and its current</li> </ul>	<ul style="list-style-type: none"> <li>○ ECON</li> </ul>

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	Analysis and Demand Assessment study commissioned by the World Bank Group		<ul style="list-style-type: none"> <li>➤ Described by NTB Province and 5 (five) regencies/cities in Lombok.</li> <li>➤ Extensive and solid discussion</li> </ul>	<ul style="list-style-type: none"> <li>○ enterprises and services will be needed with tourism growth, e.g. some basic assessment of market saturation at present (see Howarth report). To be done in Task E.</li> </ul>	state compared to other tourism destinations in Indonesia, but there may need to be further explicit discussion.	
b.4	Assemble and review information (i.e. from the Market Analysis and Demand Assessment study) on capabilities and skills of local businesses, especially local firms and communities to play an active role in, and benefit from, accelerated tourism development.	TOR requirement partially met	<ul style="list-style-type: none"> <li>a. Only half complete: little understanding of how prepared local businesses are to play an active role in tourism development.</li> <li>b. Put Lombok arrivals over a longer-term trend of say 10 years.</li> <li>c. Source country profiles – actual numbers and clear indication of arrivals – day visitors vs. overnight tourists.</li> <li>d. Gaps in market information evident (purpose of visit, length of stay - presented only for hotels, accommodation used, geographic distribution of visitors across the Island.</li> <li>e. Any implications for the Demand Assessment findings?</li> <li>f. Breakdown of expenditure by key items will be helpful and information on country of origin vs. expenditure.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Adequate                             <ul style="list-style-type: none"> <li>○ At section 7.2.1 identify the key issues that are likely to hold back local businesses in grabbing new business from tourism growth.</li> </ul> </li> </ul>	➤ See Section 4.3.4.4.	➤ ECON
	Capabilities and skills of <u>local businesses</u> , especially <u>local firms</u> ..., to play an active role in, and benefit from, accelerated tourism development.	124-126 127-136	<ul style="list-style-type: none"> <li>➤ Very thin discussion at section 7.1: no real idea of ability of local firms to play an active role in tourism development.</li> <li>➤ Notes "a more structured workforce analysis will be</li> </ul>	<ul style="list-style-type: none"> <li>○ Need to identify the key issues that are likely to hold back local businesses in grabbing new business from</li> </ul>	<ul style="list-style-type: none"> <li>○ Although limitations and barriers are discussed, digital literacy and websites of tourism businesses are not explicitly said</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>

Task (see Terms of Reference)	Page/para in report (insert ref.)	Assessment (see above)	Comments (for partially and not met assessments, state what is required to achieve satisfactory completion of the task) (green shading indicates comment previously advised)		ACTION	ACTION BY
			12 December documents	22 March 2019 documents		
			carried out in the context of strategy development": needed here.	tourism growth. For example, how internet ready are Lombok's firms – websites, digital literacy? This work will be needed to inform the "Capacity Building Program" and the "Phased Infrastructure ... Plan".		
Capabilities and skills of ... <u>communities</u> , to play an active role in, and benefit from, accelerated tourism development.	56-60 124-126 127-136		<ul style="list-style-type: none"> <li>➤ Good discussion of education.</li> <li>➤ Para 4.2.5. sets-out 'Opportunities in Tourism and Hospitality'.</li> </ul>	<ul style="list-style-type: none"> <li>○ .</li> <li>○ Under Task G preparation of the Capacity Building Program will need to re-assess the gap analysis established at para. 7.1.1 in Vol. 2.</li> </ul>	<ul style="list-style-type: none"> <li>○ Noted</li> </ul>	<ul style="list-style-type: none"> <li>○ ENV</li> </ul>

## Section #3:

# PART B

## EVALUATION AGAINST TASKS BY CHAPTERS

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
<b>B. Analysis of demand and opportunities for tourism destination area development</b>					
-	1.1	1. Please use appropriate references (Indonesia Tourism Development Project) and statistical data, not a website quote!).	1. Not checked for this: see comment (i) under General Comments at pg 2.	<input type="radio"/> Done	<input type="radio"/> ECON
-	1.1./1.2	2. The introduction jumps from tourism goals to objectives of a sub-task of the IMTP. Again, the IMTP preparation process and the role of this Task in it is not clarified.	2. Done in Vol. 1. See comment (i) under General Comments at pg 2.	<input type="radio"/> Done	<input type="radio"/> ECON
b.3	1.5 Global trends	3. For each trend highlighted, what are the implications for the tourism forecasts and the ITMP? Do any of the trends mentioned here result in a re-evaluation of the Demand Assessment forecasts? Throughout, the report does not meet the TOR, which requires: "Assemble and review information on domestic and foreign visitors and related accommodation, facilities, and attractions, past visitor trends and projected growth, and related demand for new tourism enterprises and services with particular emphasis on the Market Analysis and Demand Assessment."	3.	<input type="radio"/> Done	<input type="radio"/> ECON
b.1	2. Demographics	<p>4. Difficult to get a sensible picture of population concentrations and densities without mapping. Need maps showing population sizes and densities of areas.</p> <p>5. In general, this section presents a comprehensive baseline. However, a lot of inaccuracies and inconsistencies remain indicating a lack of quality control.</p> <p>6. An analysis of household size is missing. Service levels for basic infrastructure are often measured by number of households served or house connections provided. Therefore, it is important to provide a baseline on average household size to convert population into household related data.</p> <p>7. In this section, please provide information on population in terms of gender and working age. If possible up to kecamatan level.</p> <p>8. It is mentioned the largest population of 1.183.204 people in Kabupaten Lombok Utara and lowest population in Kabupaten Lombok Utara population of 216.515 people. Perhaps this is mistypo, highest population is in Lombok Timur? Please check again, cross check with Table 10 and other Tables in this Chapter, should check consistency.</p> <p>9. Year 2014 shows a sudden peak in population growth. This asks for an explanation because if this peak would be related to a change in registration methodology then the calculation of future growth rates based on past growth should be corrected to eliminate potential methodological errors.</p> <p>10. Page 20: Table 2 shows year 2016 data which is not consistent because all other tables use year 2017 as baseline. Please correct.</p>	<p>4. Done.</p> <p>5. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>6. Not done: see comment (viii) under <i>Task B</i> at page 2.</p> <p>7. Not done: see comment (vi) under <i>Task A</i> at page 2.</p> <p>8. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>9. Not checked for this: see comment (i) under General Comments at page 1.</p> <p>10. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>11. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>12. Not checked for this: see comment (i) under General Comments at pg 2.</p>	<input type="radio"/> Done	<input type="radio"/> ECON

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
		<p>11. Page 20: Table 2 shows land area of Lombok Barat as 1053.87km<sup>2</sup> but in Volume Baseline Task C Page 41 the same Kabupaten has a land area of 805.92 km<sup>2</sup>.</p> <p>12. Page 25: Table 10 and Figure 6 are not correct. Total population Lombok Timur should be 1,183,204 (refer to Table 1 page 19) and not 264,538. Consequently, the calculated growth rates must be corrected as well.</p> <p>13. Page 27: Table 14 shows data for Kecamatan Sekotong instead of Kec. Batu Layar.</p> <p>14. Page 27: text par. 2.2.1 and table 13 are not consistent.</p> <p>15. Page 27-28: Texts of par.2.2.1 and par. 2.2.2 have been mixed-up. Also the text and tables show inconsistencies, for instance the Sekotong population in 2016 in the text is 55,466 and in Table 15 it is 68,451.</p> <p>16. Page 28: Table 16 population density Sekotong is 1,583 and in Table 5 (page 22) Sekotong density is just 133.</p> <p>17. Page 27-28: in tables 15 and 16 the population per sub-district is inconsistent (for instance Pelanggan pop. in table 15 is 8,935 and in table 16 is 15,000.)</p> <p>18. Page 31: Table 24 population density Pemenang is 281 while on page24 table 9 Pemenang density is 449</p> <p>19. Page 32: Table 26 shows population density of 8,717. This is not correct (should be 419; compare Table 11 page 26).</p>	<p>13. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>14. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>15. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>16. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>17. Not checked for this: see comment (i) under General Comments at pg 2.</p>		
b.2	3. Macro economics	<p>20. How does Lombok compare to other areas of Indonesia and the region?</p> <p>21. Fig 8: GDP contribution: only some sectors indicated</p> <ul style="list-style-type: none"> <li>○ In this section, the figure shows aggregated GRDP data from the five Kota/Kabupatens in Lombok. Kabupaten Lombok Timur is the largest contributor to GRDP with IDR 17.6 Trillion, while Kabupaten Lombok Utara has the lowest GRDP with IDR 4.3 Trillion. Is there any information on the contribution of the tourism sector in the GRDP? Or was it accommodation and FB represent the tourism sector?</li> </ul>	18. Not checked for this: see comment (i) under General Comments at pg 2.	○ Done	○ ECON
b.2	3.2 Need and overview graph showing GDP share of each region/city	<p>22. Any indication of GDP contribution of Tourism?</p> <p>23. What is the actual value of Tourism FDI (not only %) and what has been the FDI trend over past 10 years?</p>	<p>19. Not checked for this: see comment (i) under General Comments at pg 2.</p> <p>20. Not checked for this: see comment (i) under General Comments at pg 2.</p>	○ Done	○ ECON
b.1	b.1 4. Socio-economic	<p>24. Issues like age profile, foreign language proficiency should be added – important for tourism</p> <p>25. Employment (table 4-2) add percentages</p> <p>26. Any indication of employment in tourism?</p> <p>27. This chapter provides a general overview of the socio-economic characteristics of community in North Lombok, West Lombok,</p>		○ Done 22. Added to section 4.4.1.	○ ENV

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
		Central Lombok and East Lombok Regencies as the locations are the priority tourism areas. Is it possible to provide information covered in chapter 4 in terms of gender?			
b.1	4.2 Education	28. Paragraph about Mataram Vocational High Schools and NTB Tourism Polytechnic is unclear, check and correct p.56/57 29. Would be good to make a table of tourism-specific training facilities and their capacities 30. What is the level of training of tourism employees currently? 31. Pay attention of level and quality of tourism guide training	23. Not checked for this: see comment (i) under General Comments at pg 2.	<ul style="list-style-type: none"> <li>○</li> <li>○ Done</li> <li>○ Added to 4.2.1. Education Facilities</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>
b.1	4.2.5 Opportunities in Tourism and Hospitality	32. This is a rather vague expression of demand for qualified tourism workers, no indication of qualifications and types of skills required/in demand	24. T	<ul style="list-style-type: none"> <li>○</li> <li>○ Done but it required further analysis because lack of data</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>
b.1	4.3 Workforce and employment	33.	25. -	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>
b.1	4.3.1 Workforce and manpower	34. P64: Explains decline in unemployment due absorption in the informal sector – needs more explanation about the structure and employment size of formal and informal sectors is needed 35. Regarding the workforce and manpower information in NTB, if possible, please provide information on the workforce coming from Lombok Island (or NTB) and from outside Lombok Island, particularly in tourism sector. To what extent Lombok people have competed with their others from outside Lombok (for instance from Bali, Java etc.). and why?		<ul style="list-style-type: none"> <li>○</li> <li>○ Done but it required further analysis because lack of data</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>
b.1	4.3.2. Job Seekers	36. The report mentions that a total of 10,873 job seekers, where 63.36% is male and 36.63% is female, have been registered with the Labor and Transmigration Agency and have not get any job (Central Bureau of Statistics NTB Province, 2018). Is there any information on job seekers who were from Lombok Island and beyond Lombok Island? What about in tourism sector?	26.	<ul style="list-style-type: none"> <li>○</li> <li>○ Done</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>
b.1	4.3.3 Wages	37. Confirm that minimum wage is per month? 38. It is noted that the minimum wage is an amount of money that must be paid by employers to their workers, within a given region. This amount differs from region to region and is determined based on the cost of necessities of life in each region as well as productivity and economic growth. It would be good to see if there any information on wages comparing different sectors. Are those who work in the tourism sector getting higher wages, and therefore people would be more attractive in working in tourism sector? 39. Any data regarding wages in tourism sector – is it a low-paying sector or not? 40. Not sure how the aspect of per capita expenditure fits here? Not related to wages.	27. Not checked for this: see comment (i) under General Comments at pg 2. Not checked for this: see comment (i) under General Comments at pg 2.	<ul style="list-style-type: none"> <li>○</li> <li>○ Noted</li> <li>○ Minimum wage is per month.</li> <li>○ Each sector applies the same minimum wage to its workers, but tourism sector workers are more likely to get tips outside the minimum salary so they can earn more. For example a hotel driver will get more tips than a driver in a government agency, or a cleaning service at a hotel compared to a cleaning service at the Bank.</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
				<ul style="list-style-type: none"> <li>○ During the holiday season and the number of tourist visits increases, workers in the tourism sector earn more. Even the tips or bonuses obtained can be greater than the regular salary.</li> <li>○ Value of income and expenditure can be used as an indicator to determine welfare status. However, there are other factors that also determine such as the number of families, land ownership, productive / non-productive age, etc.</li> <li>○</li> </ul>	
b.1	4.4. Poverty and Social Problems	<p>41. Regarding social problems data in NTB Province, is there any information per district; what would be the implications and opportunities for tourism development?</p> <p>42. In Table 4-10, it is mentioned that there is Remote Indigenous Community identified as social welfare problem. What does this mean?</p>	28. . Not checked for this: see comment (i) under General Comments at pg 2.	<ul style="list-style-type: none"> <li>○</li> <li>○ Social data per district is not available</li> <li>○ Noted and mentioned in vol 2</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ENV</li> </ul>
b.1	4.5. Ethnicity	43.	29. -	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>
b.1	4.5.1. Ethnics Diversity in the Lombok Island	44. Custom and Traditions... cross this out, sentence is incomplete!	30. Not checked for this: see comment (i) under General Comments at pg 2.	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>
b.1	4.6.4 Indigenous people's presence	<p>45. What are numbers and proportion of indigenous people in relation to the total population?</p> <p>46. Also add a description of unique customs that may appeal to tourism and to what extent are these communities open to receiving tourists?</p> <p>47. This section provides good insights. However, we would like to know, to what extent have they exposed to tourism, and how are they exposed to tourism?</p>	31.	<ul style="list-style-type: none"> <li>○</li> <li>○ There is no data that states the number of IPs</li> <li>○ Done</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>
b.3	5. Lombok tourism patterns	48.	32. -	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○</li> </ul>
b.4	5.1 NTB Tourism patterns	<p>49. Domestic tourism figures – do they exclude returning residents?</p> <p>50. Put Lombok arrivals over a longer-term trend of say 10 years.</p> <p>51. Interpret huge growth spurts – what are reasons?</p>	<p>33.</p> <p>34.</p> <p>35.</p>	<ul style="list-style-type: none"> <li>○</li> <li>○ Done</li> <li>○ Several chapter has not optimum analysis because limited data.</li> </ul>	<ul style="list-style-type: none"> <li>○</li> <li>○ ECON</li> </ul>

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
		<p>52. Source country profiles – actual numbers and clear indication of arrivals – day visitors vs. overnight tourists.</p> <p>53. Gaps in market information e.g. Purpose of visit – holiday, VFR, MICE, shopping, business, etc.; Length of Stay - this is presented only for hotels – does this cover all tourists? Accommodation used – do all visitors stay in hotels? Geographic distribution of visitors across the Island.</p> <p>54. Any implications for the Demand Assessment findings? Will any of these findings result in adjustments of the forecasts etc.? Where will you present adjusted forecasts? In the scenarios deliverable?</p>	36. 37. 38.		
b.4	5.1.10 Expenditure – breakdown of expenditure by key items will be helpful.	55. Based on data provided by the NTB Provincial Tourism Agency, the average daily expenditure of domestic visitors in NTB was IDR 1,555,200 in 2016; showing a small growth of 0.3% from the previous year. However, there was a significant jump of average daily expenditure of around 26.5%; from IDR 1,225,000 to IDR 1,550,000. While, on the other hand, the average daily expenditure of foreign visitors in 2016 was IDR 1,360,000. As requested, it would be useful if information on country of origin vs. expenditure.	39.	<input type="radio"/> Done <input type="radio"/> Several chapter has not optimum analysis because limited data.	<input type="radio"/> ECON
b.4	5.5.3. Domestic and Foreign Visitors Seasonality	56. The monthly average for foreign visitation was 72,000 visitors in 2017. This is mis typo, please revise accordingly.	40. Not checked for this: see comment (i) under General Comments at pg 2.	<input type="radio"/> Done	<input type="radio"/> ECON
b.3 b.4	6. Tourism Facilities	<p>57. GIS mapping is helpful, but presentation is not clear in respect of grading levels</p> <p>58. Provide a definition of “hotel” and “star-rated” vs. “non star-rated”.</p> <p>59. Breakdown of number of hotels and rooms by star-grading and type required</p> <p>60. Are all accommodations accounted for in the analysis or are some outside of database?</p> <p>61. This section provides a factual overview of capacity, however this should be relative to competitor destinations in Indonesia and region, especially Bali to get a relative picture</p> <p>62. Important: there is a need for a competitor analysis on overall performance and capacity</p> <p>63. Need for price comparison with competitor destinations</p> <p>64. Summary discussion needed regarding accommodation performance and capacity</p> <p>65. Any implications for the Demand Assessment findings? Will any of these findings result in adjustments of the forecasts etc (where will you present adjusted and more detailed--at the kecamatan level—forecasts for hotel facilities needed etc)?</p> <p>66. In this Chapter, please add information on tourist attractions/ objects/ sites/ intangible attractions/ heritage/ folklores, etc.</p>	41. Not checked for this: see comment (iv) under General Comments at page 2. 42. 43. 44. 45. 46. 47. 48. 49. 50.	<input type="radio"/> Done	<input type="radio"/> ECON
b.4	7. Capabilities and skills	67. This section could perhaps be combined with Section 4, especially with 4.3.	51. 52.	<input type="radio"/> This section must be separated with section 4 because	<input type="radio"/> ENV

Task (adjudged)	Page/para in report	Comments on 12 December documents	Comments on 22 March 2019 documents	ACTION	ACTION BY
		68. What are the capabilities and skills of the surveyed/interviewed businesses and employees? it has not been described in this section. 69. Any implications for the Demand Assessment findings? Will any of these findings result in adjustments of the forecasts etc?	53.	it discuss different aspect	
b.4	7.1 Local businesses and firms	70. Better to combine all intervention points or make a table with short points per area	54.	○ ○ Done	○ ○ ECON
B	8. Summary	71. Good summary but each section of the report should ideally end with a summary/conclusion section that extracts and discusses most relevant issues for ITMP and as background to an overall SWOT.	55. This remains an issue to address: see comment (ii) under <i>General Comments</i> at page 2.	○ ○ It is better to show the summary with pro cons because it easier to understand.	○ ○ ECIN
				○	○