



# Marketing and Branding Objective 6)

Identify other opportunities to increase income from Indian forest management; **ECOTOURISM, ECOSYSTEM SERVICES, & BIOENERGY.**



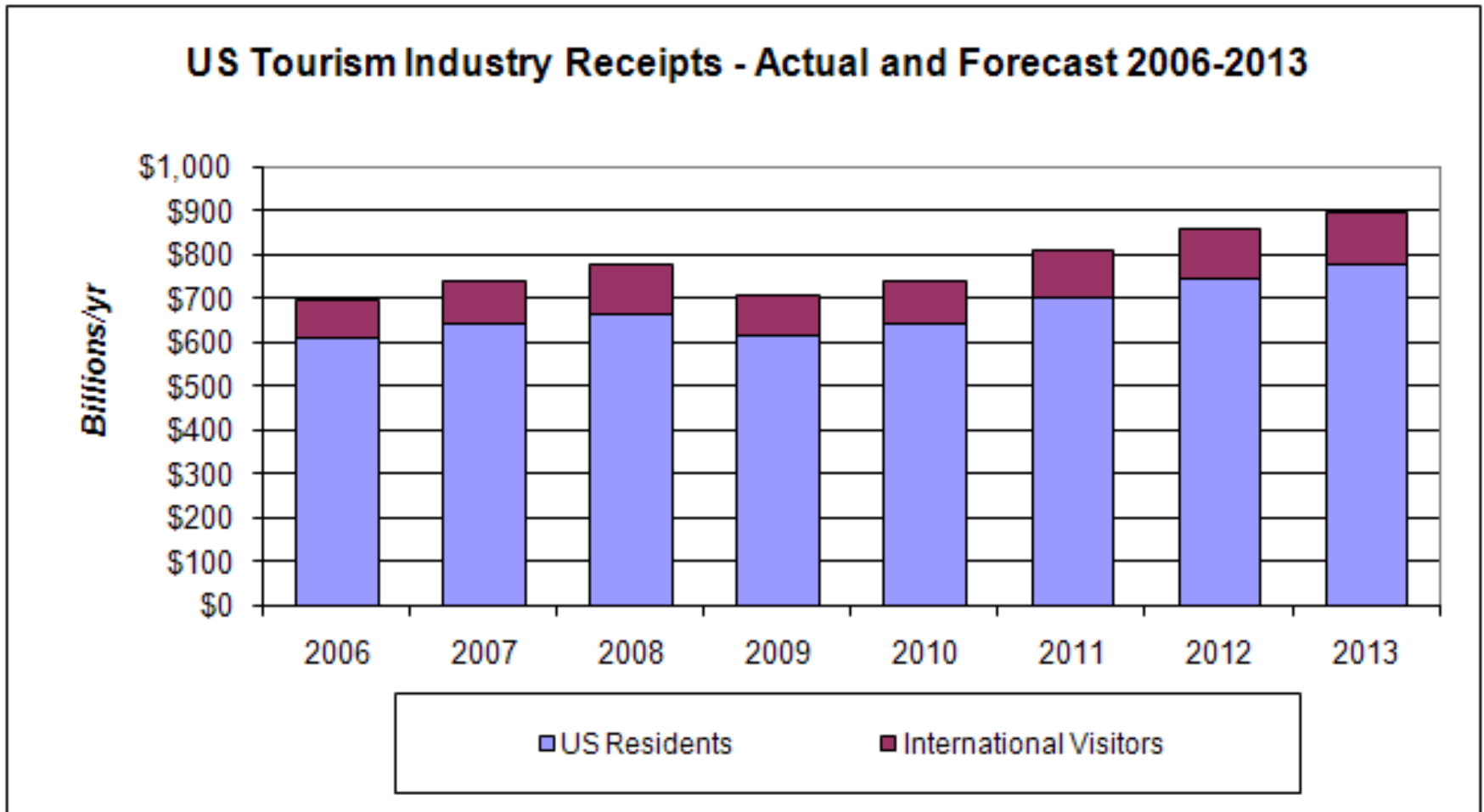
Jim Freed – WSU  
Larry Mason – UW  
Gary Morishima - ITC

# Wild-Harvested NTFPs = \$600 million/year

Table 26-2. Estimated wholesale value of wild-harvested nontimber resources in the US, assuming US Forest Service and BLM sales receipts are 10 percent of first point of sales value; US Forest Service sales represent approximately 20 to 30 percent and BLM sales represent approximately 2 to 15 percent of total supply; and first point of sales value is 40% of wholesale price. (Million 2005\$)

Product Category	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Landscaping	89	73	56	54	51	44	37	35	28	28
Crafts/Floral	119	105	83	112	134	126	118	87	89	138
Seed/cones	6	2	5	5	12	6	3	5	3	3
Edible fruits, nuts, sap	56	38	41	56	47	49	58	46	35	42
Grass/forage	15	14	16	19	20	19	17	24	19	19
Herbs, medicinals	1	2	2	0	3	3	2	2	1	2
Subtotal	285	234	202	246	267	247	236	199	175	232
Fuelwood	397	367	306	312	323	310	294	271	273	302
Posts and poles	89	65	67	35	33	40	29	33	26	24
Christmas trees	114	94	96	102	97	96	80	82	66	65
<b>Total</b>	<b>885</b>	<b>760</b>	<b>671</b>	<b>695</b>	<b>720</b>	<b>693</b>	<b>639</b>	<b>585</b>	<b>540</b>	<b>622</b>

# ***Tourism as a Non-Timber Forest Product? \$700 billion/year!***



# Eco- and Cultural Tourism Assessment

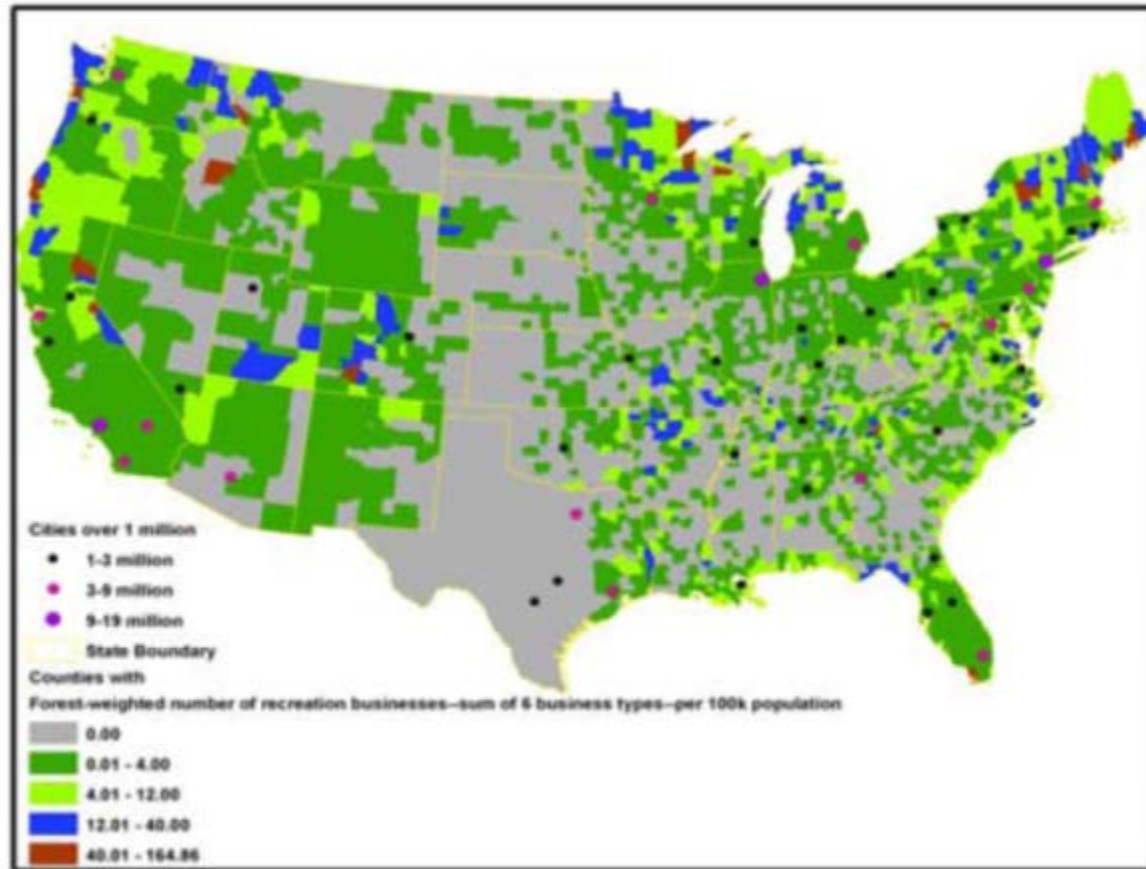
*Ecotourism is the fastest growing sector of the tourism industry increasing by 10-15% each year. Preliminary evidence indicates significant ecotourism opportunities for combined benefits of income generation with cultural education.*

**Table 1.** Fastest-growing U.S. nature-based outdoor activities, 2000–2007

Activity	Total participants (millions), 2007	Percentage change in participants, 2000–2007	Total days of participation (billions), 2007	Percentage change in total days, 2000–2007
Viewing or photographing flowers and trees	118.4	25.8	10.2	77.8
Viewing or photographing natural scenery	145.5	14.1	11.5	60.5
Driving off-road	44.2	18.6	1.3	56.1
Viewing or photographing other wildlife	114.8	21.3	5.3	46.9
Viewing or photographing birds	81.1	19.3	8.0	37.6
Kayaking	12.5	63.1	0.1	29.4
Visiting water (other than ocean beach)	55.5	1.6	1.1	28.1
Backpacking	22.1	−0.6	0.3	24.0
Snowboarding	11.3	7.3	0.1	23.9
Rock climbing	8.7	−5.5	0.1	23.8
Visiting nature centers, etc.	127.4	5.0	1.0	23.2
Big-game hunting	20.2	12.8	0.3	21.2
Mountain climbing	11.8	−12.5	0.1	20.5
Visiting ocean beach	96.0	10.5	1.4	16.3
Sightseeing	113.2	4.1	2.3	14.0
Visiting wilderness	70.6	3.0	1.1	12.8



## Forest-based recreation size and location



*Figure 42-1—Location of cities and forest-based recreation businesses (5 types) per 100,000 population.*

# 50 State Tourism Web Sites

<u>Topic</u>	<u>Displayed</u>	<u>Front Page</u>
Nature	50 (100%)	45 (90%)
Golf	46 (92%)	26 (52%)
Tribes	23 (46%)	8 (16%)



***State Tourism Sites and Availability of Native Information –more detail:***

<b>Tribes Total</b>	<b>23 (46%)</b>
<b>Historical Sites</b>	<b>21 (42%)</b>
<b>Tribal Enterprises</b>	<b>15 (30%)</b>
<b>Tribal Culture</b>	<b>14 (20%)</b>
<b>Tribes and Nature</b>	<b>4 (8%)</b>
<b>Pow Wows</b>	<b>9 (18%)</b>



# ***Pow Wows***

**Dante Desiderio**, the economic development policy specialist for the **National Congress of American Indians**, said since many tribes exist in rural or remote areas, drawing traffic may sometimes be challenging, but the cultural perspective of a pow wow can have certain advantages to include monetary gains. Making stronger efforts to gain attendees could pay off exponentially.

“There is a new impetus for tourism based on eco- and cultural tourism. It’s proven that the spend rate for eco- and cultural tourism is almost three times the regular tourism rate. They tend to spend more time because they are there to learn instead of doing a superficial visit.”

*Indian Country Today March 12, 2010*

<http://www.indiancountrytoday.com/living/powwow/86651067.html>

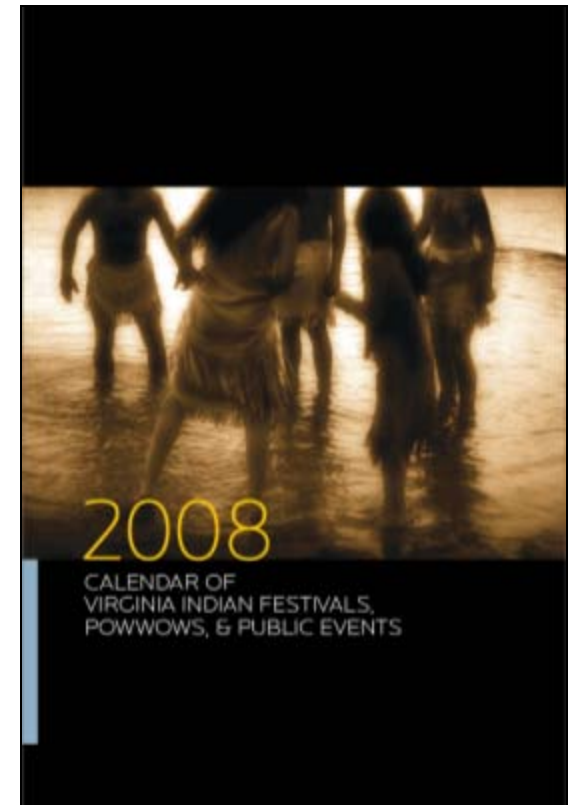
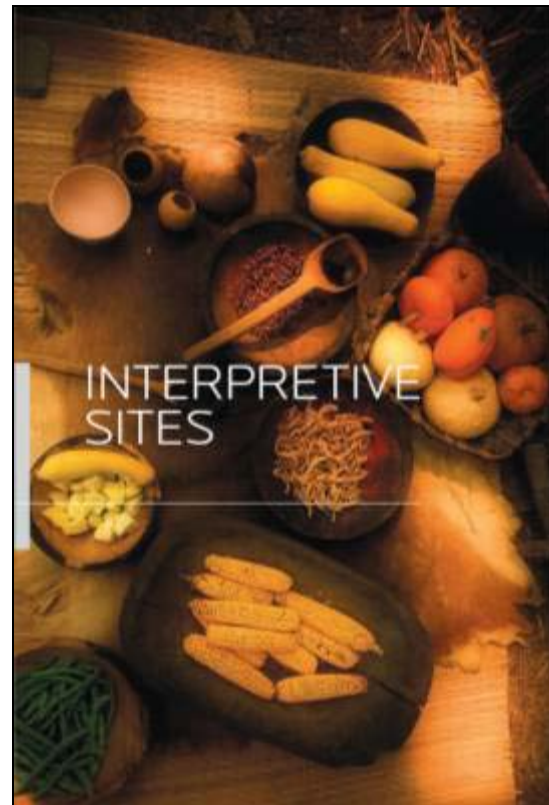
**73 Pow Wows will be held in 31 states during May 2010**

<http://powwows.com>



**Conclusions: Ecotourism is a growing industry. Tribes and Native corporations have unique ecotourism products to offer. Benefits could include new sources of revenue and employment, augments to resort and casino attractions, and opportunities for historical and cultural education. State tourism offices offer low cost opportunity to elevate Native enterprise and cultural visibility.**

**Caveats: Tourism may be intrusive and intellectual property rights must be protected. At what scale might tourism threaten culture?**



# One Interesting Example of Educational Potential

*by Indians for Everyone*



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# ***Ecosystem Services***

Ecosystem services include *provisioning services such as food, water, timber, and fiber; regulating services that affect climate, floods, disease, wastes, and water quality; cultural services that provide recreational, aesthetic, and spiritual benefits; and supporting services such as soil formation, photosynthesis, and nutrient cycling.*

***-Millenium Ecosystem Assessment***





**Most payments for environmental services are provided by Government and NGO programs. Tribes and Native Corporations currently receive little benefit.**

	2005	2006	2007	
<b>Government</b>				
Federal Programs	\$ 248	\$ 243	\$ 248	} <b>\$260 million</b>
State Programs	\$ 8.4	\$ 8.9	\$ 12.0	
<b>Non-government</b>				
Voluntary Carbon Market	\$ 0.2	\$ 0.4	\$ 5.5	} <b>\$293 million</b>
Conservation Easements	\$ 69	\$ 92	\$ 111	
Fee Simple Purchases	\$ 142	\$ 177	\$ 177	
	\$	\$	\$	
<b>TOTAL PAYMENTS</b>	<b>468</b>	<b>521</b>	<b>553</b>	

*Table 27-1. Total payments for environmental services from Federal and State agencies and non-government organizations and individuals in constant 2005 dollars (\$1000,000s).*



## ***Voluntary Carbon Markets - Carbon Credits***

- Forestry = Afforestation, Additionality, Preservation***
- Accounting complexities***
- Costly aggregators, brokers, verifiers, monitors***
- Social justice issues (CDMS & REDDS)***
- Uncertain politics***
- CCX Price 1Q 2009 = \$2/MT CO<sub>2</sub>e but 1Q 2010 = \$0.10/MT CO<sub>2</sub>e***

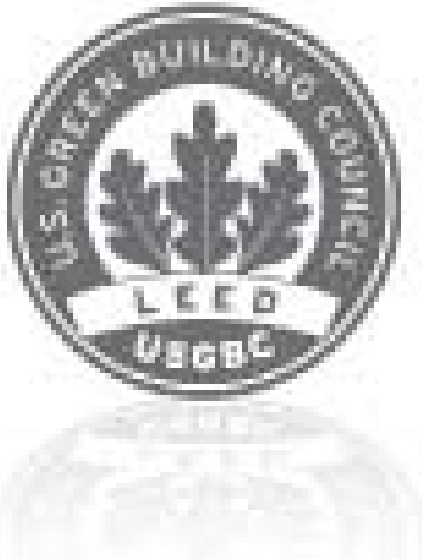
***Conclusion: Markets and values are very small.***

***Opportunities appear limited (at least for now).***

***Conclusion: carbon markets represent < 1% of total govt and NGO payments for environmental services.***



# GREEN BUILDING STANDARDS



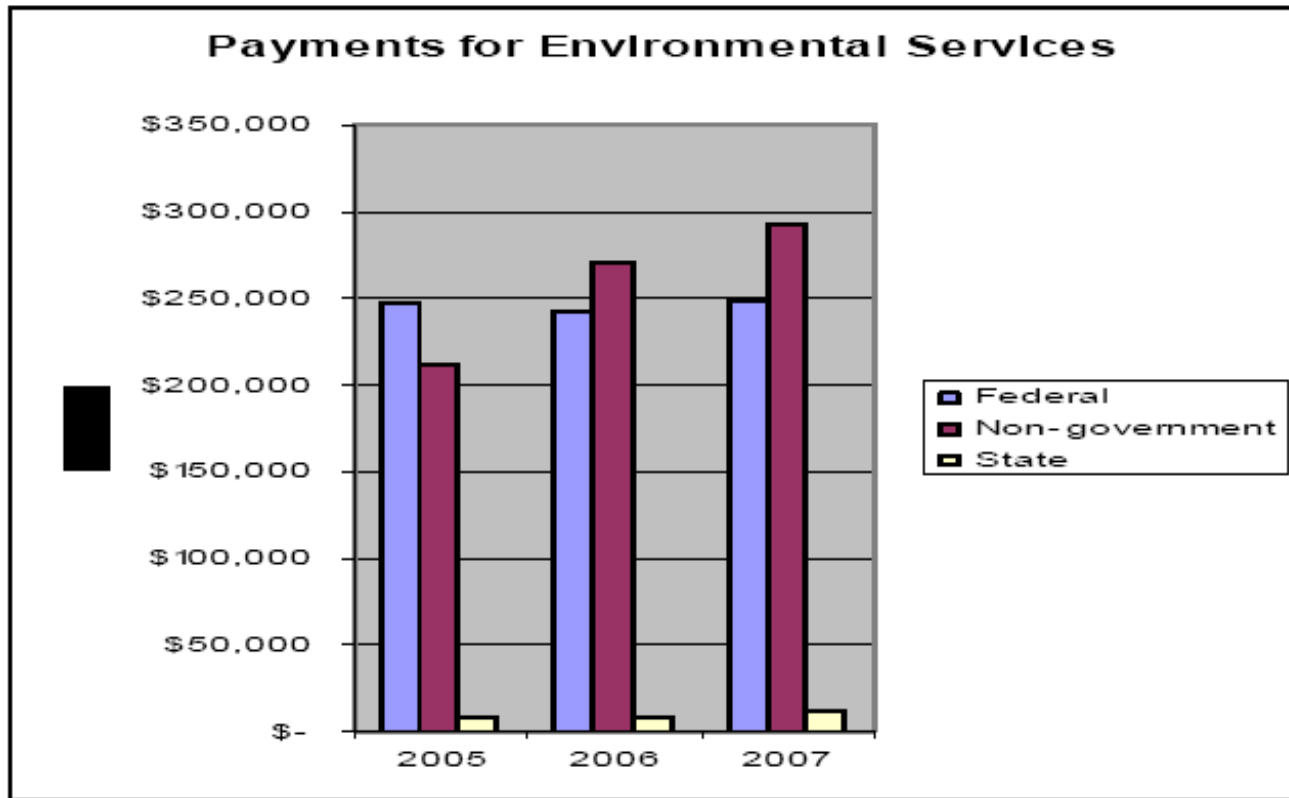
- Variable and arbitrary standards
- Warring labels
- Costly administration
- Complex accounting
- Requires certification
- Little market support
- Public confusion over what's "green"



***Conclusion: Tribal benefits from "green" building markets are uncertain but heightened visibility for tribal forestry could bring opportunity.***

**99% of environmental service payments are to support sustainability through altered practices or conservation purchases.**

**While Govt expenditures have been flat, NGOs are increasing**



*Figure 27-1. Total payments from Federal and State agencies and non-government organizations and individuals in constant 2005 dollars (\$1000s).*



## Tribal Stewardship provides ecosystem services

- Clean Air & Water
- Species Habitats
- Carbon Storage
- And more...
- A Sense of Who We Are

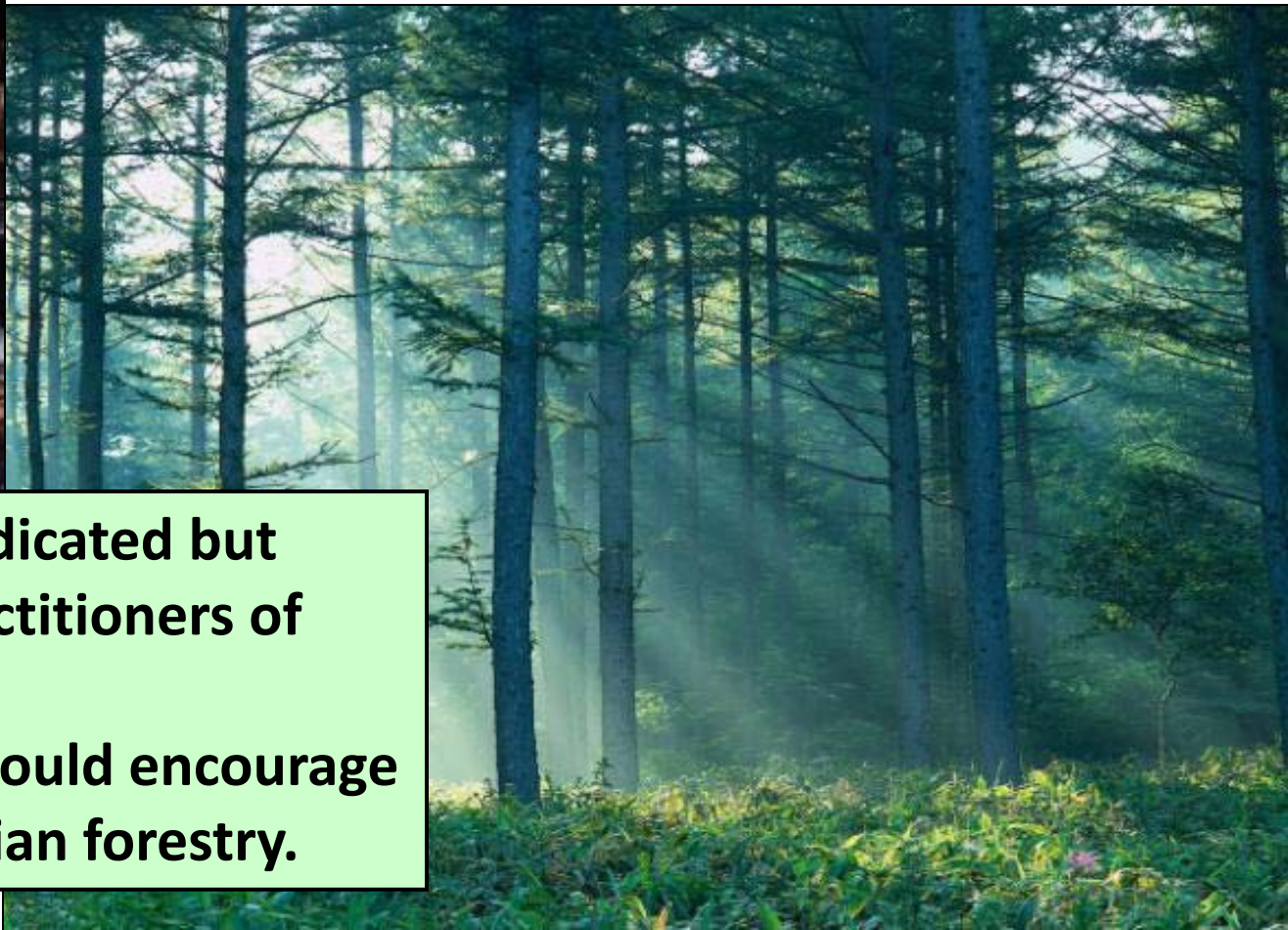






## Suggestion:

- Native re-acquisition of forestlands
  - Reduce Costs of Conservation
  - Ensure Long-Term Stewardship
  - Reward Ecosystem Services Delivery
  - Support Anchor Forest Infrastructure



**Indian Nations are dedicated but underappreciated practitioners of SUSTAINABILITY.**

**Heightened visibility could encourage public support for Indian forestry.**

## ***Conclusions:***

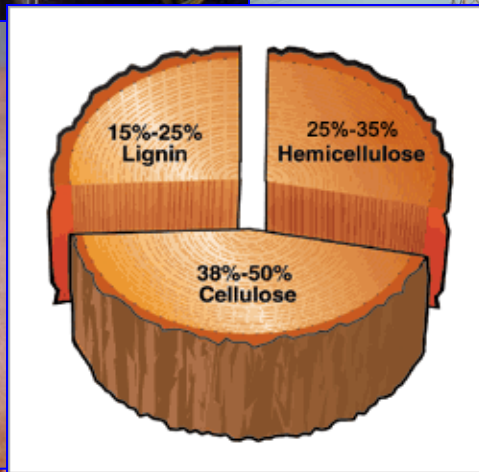
**Ecosystem service payments seek to promote sustainability of managed environments.**

**Indian forestry programs provide unique and enduring stewardship for sustainability.**

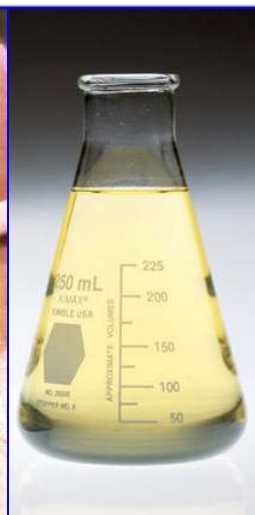
**Govt and NGO environmental service payments could receive high sustainability return from underwriting Native management costs and land purchases.**

**Carbon credits, green building standards, and other payment schemes are not significant opportunities at this time.**





# BIOENERGY



U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy

## Tribal Energy Program

<http://apps1.eere.energy.gov/tribalenergy/>

**Tribes should be well-positioned to benefit from wood-to-energy development but obstacles remain that hinder progress**

# Unhelpful Myths Slow Wood to Energy

- Forests unmanaged are protected
- Woody biomass will spur overharvest
- Conversion technologies are immature
- Wood to energy will increase GHG
- Change is too expensive
- A fossil-free future is coming

*It ain't what you don't know that gets you into trouble. It's what you know for sure that just ain't so. -- Mark Twain*



# Disagreement in policy definitions and objectives

The Energy Independence and Security Act of 2007

**15 Billion Gallons/Year Corn Ethanol**

**21 Billion Gallons/Year Cellulosic Biofuels**

**BUT!! Not from federal forests!**

Forest biomass from federal forests, such as trees, wood, brush, thinnings, chips, and slash are not considered renewable resources.

**2/3 of Western Forest Health Crisis is the Federal Forests**





**Agriculture Secretary Vilsack Announces Renewable Energy Initiatives to Spur Rural Revitalization Throughout the Country** - *USDA Press Release 10/21/10*

**But recent headlines...**

**Burning Trees for Power Worse than Burning Coal; Study: Wood-Burning Power Plants Using Biomass Found to Release More Greenhouse Gasses than Coal**  
- *CBS News 6/11/10*

**Is the RFS Broken? Prospective cellulosic ethanol producers are beginning to doubt the usefulness of the renewable fuels standard and fear the impact of lessened federal support.** – *Ethanol Producer Magazine 10/8/10*

**(Bio)Mass Confusion, High Costs, and Environmental Concerns Have Pushed Biomass Power to the Sidelines in the U.S.** – *WSJ 10/18/10*





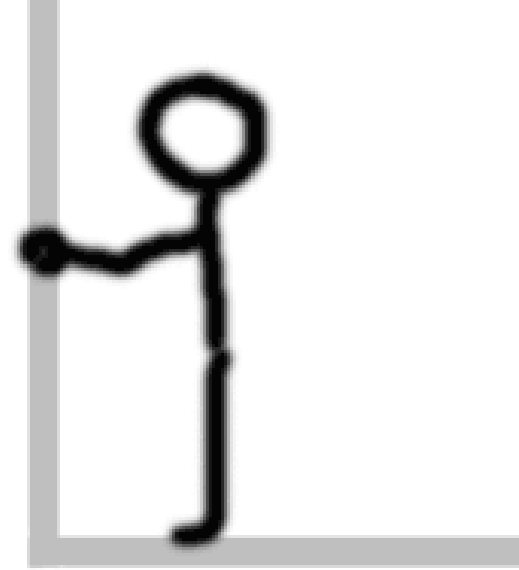
## ***Conclusions:***

**Energy Policies remain uncertain for investment.**

**Every potential tribal project is unique (there are no models).**

**Wood energy development has been difficult for tribes (and the US).**

**Small projects such as institutional heating or pellet manufacture may be most promising.**





## *In Summary:*

- *We found many non-timber opportunities to generate new sources of revenue from forests; all of which could benefit from promotion of Indian forestry.*

- In the short term, NTFPs and Ecotourism appear to hold the greatest promise for enterprise development.
- In the long term other environmental payments, especially support for land re-acquisitions, may have potential but will require guidance and engagement.