

Development
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Commission

Sustainable Tourism for Development

GUIDANCE NOTE

METHODOLOGY

SITUATION ANALYSIS

ANNEXES

Sustainable Tourism for Development

Guidebook

Enhancing capacities for Sustainable Tourism for development in developing countries

Contract nr. DCI-MULTI-2011/280-663

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The purpose of the project is to enhance a common understanding and commitment about Sustainable Tourism, and to demonstrate how it is a vehicle to foster economic and social growth, through the achievement of the development imperatives, while minimizing negative social, cultural and environmental impacts.

Beneficiaries and stakeholders of the study are:

- EU officials working in the field of cooperation and development;
- Other beneficiaries: International Development Community; Policy makers, Tourism sector and its value chain; Civil Society Organizations.

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Acronyms

ATF	Aid for Trade
CO ₂	Carbon Dioxide
DC	Developing Country
DMO	Destination Management Organization
DTIS	Diagnostic Trade Integration Studies
EIA	Environmental Impact Assessment
EU	European Union
FDI	Foreign Direct Investment
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
GSTC	Global Sustainable Tourism Criteria
GVA	Gross Value Added
HR	Human Resources
HRD	Human Resources Development
ICT	Information and Communication Technology
ILO	International Labour Organization
ITC	International Trade Centre
PPP	Public-Private Partnership
PRSP	Poverty Reduction Strategy Paper
TKZN	KwaZulu-Natal Tourism Authority
LDC	Least Developed Country
MSME	Micro, Small and Medium Enterprises
NGO	Non-Governmental Organization
NTO	National Tourism Office
OECD	Organisation for Economic Co-operation and Development
PCM	Project Cycle Management
USD	United States Dollars
UNEP	United Nations Environment Programme
UNDP	United Nations Development Programme
SCTD	Steering Committee on Tourism for Development
SIDS	Small Island Developing States
SME	Small and Medium Sized Enterprise
SNV	Stichting Nederlandse Vrijwilligers - Netherlands Development Organization
ST-EP	Sustainable Tourism - Eliminating Poverty
TSA	Tourism Satellite Account
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDAF	United Nations Development Assistance Framework
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNIDO	United Nations Industrial Development Organization
VCA	Value Chain Analysis
WHST	World Heritage and Sustainable Tourism
UNWTO	World Tourism Organization
WTO	World Trade Organization
YBR	Yasuni Biosphere Reserve

Foreword

Over the last decades, tourism has experienced continued growth and increased diversification becoming one of the fastest developing economic sectors in the world. These dynamics have turned it into a key driver for socio-economic progress in nations worldwide.

Today, tourism is one of the major sectors in international trade and one of the main wealth creators for many developing countries. Tourism means jobs, poverty eradication, gender equality, and the protection and promotion of our natural and cultural heritage.

The recognition of the importance and potential contribution of tourism in national development strategies and in the global development agenda is also becoming a reality. Tourism has been identified by the United Nations (UN) as one of the ten sectors to drive the change towards a Green Economy and was included in the Rio+20 Outcome Document as one of the sectors capable of making “a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities.”

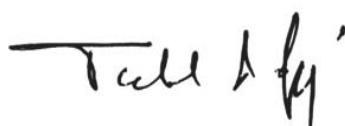
All of us have our own role to play in ensuring tourism works as a force for development. The UN system and the European Union (EU) in particular can be key drivers in this process by supporting developing countries' implementing tourism in an integrated manner, by providing guidance, monitoring progress and mobilizing the necessary financial resources. This document aims to better guide this process.

The 2011 Busan Declaration on Aid Efficiency opened new opportunities to better position tourism in the Aid for Trade agenda by placing the sector within the framework of the Official Development Assistance (ODA) under the trade category.

This same year, the European Commission's Directorate-General for Development and Cooperation – EuropeAid – and the World Tourism Organization (UNWTO) engaged in producing this *Guidebook on sustainable tourism for development* aimed at enhancing a common understanding and commitment of the EU and all development assistance agencies around the world to sustainable tourism.

The Guidebook demonstrates how the tourism sector can be a vehicle to foster economic and social growth, through the achievement of development imperatives, while minimizing negative social, cultural and environmental impacts. It highlights in particular the complexity of tourism in its linkages with the whole economic and social fabrics and shows the contrast between its high potential to build better lives for all and the low priority it has been given so far in terms international aid and, namely, of ODA.

I trust that this Guidebook will provide the basis for informed decisions on priorities and actions that need to be taken to ensure tourism's ever growing contribution to the three dimensions of sustainable development – economic growth, social inclusion and environmental preservation - in line with the UN and the EU commitments to a better future.



Taleb Rifai
Secretary-General, UNWTO

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The **Sustainable Tourism for Development** Guidebook has been successfully completed with the purpose of enhancing the common understanding about tourism as a tool for achieving sustainable development imperatives among the stakeholders participating in the field of cooperation and development.

This study was carried out within the framework of the project *Enhancing Capacities for Sustainable Tourism for Development in Developing Countries*, thanks to the co-financing received by the European Commission Directorate-General Development Cooperation (DG DEVCO).

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Executive Summary

Tourism is a major activity supporting an economic sector that is responsible for 9% of global GDP. In recent years it has seen significant growth which is forecast to continue, especially in developing countries which have seen a rate of increase in visitor arrivals that considerably exceeds the world average. Tourism accounts for 29% of exports in services worldwide and for many developing countries it provides a significant, and sometimes the primary, source of foreign exchange earnings. Academic studies have confirmed the contribution of the sector to economic growth and many international bodies, conventions and communications have formally recognised the importance of the sector as a driver of sustainable development. The new Rio+20 outcome document "The Future we Want" includes sustainable tourism as contributing to green growth.

Tourism has many characteristics that make it especially valuable as an agent for development. As a cross cutting sector, it stimulates productive capacities from trade and the provision of jobs linked to the tourism value chain. In particular, it thrives on assets, such as the natural environment, a warm climate, rich cultural heritage and plentiful human resources, in which developing countries have a comparative advantage. However, tourism can also be a source of environmental damage and pollution, a heavy user of scarce resources and a cause of negative change in society. For these reasons, it is imperative for it to be well planned and managed, embracing the principles of sustainable tourism, defined as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"¹.

The European Union and other development assistance agencies are well placed to support developing countries in identifying and implementing interventions in sustainable tourism. The purpose of this document is to guide this process. It begins with a **Guidance Note**, describing the meaning, requirements and contribution of sustainable tourism, considering how this relates to development priorities such as those of the EU, and providing guidance on the approach outlined. It then presents a **Methodology** for assessing the position of sustainable tourism, through asking a set of questions which identify needs to address and gaps to fill. The process is framed around five pillars which encapsulate the key dimensions and themes of sustainable tourism. This methodology for assessing priorities and challenges can be used equally by government and institutions. A final section provides background information on the relationship between tourism and development in a **Situation Analysis**.

The first of the five pillars in the Methodology concerns **tourism policy and governance**. To ensure that the sector is correctly positioned as a force for sustainable development it should be fully considered in development studies and frameworks for the country and be given due recognition across government. All countries should have agreed tourism policies, strategies or master plans that commit to sustainability principles and are effectively implemented. Adequate legislation and regulations should be in place that are sufficient to control and guide tourism development while being sensitive to the needs of the sector. The responsibility for tourism should be clearly vested in a specified ministry and supported by government agencies which are appropriately skilled and resourced. Finally, a fundamental requirement of good governance in this multi-dimensional sector is for structures and processes to be in place that enable and encourage private sector interests and other stakeholders to work with government on tourism planning, development and management. This should not only apply at a national level but is equally important within local destinations, where many actions that affect the sector and its impact are taken.

The second pillar covers **economic performance, investment and competitiveness**. It recognises that the sector must be competitive if it is to succeed as a force for development. The performance and impact of the sector need to be properly measured and monitored, with many developing countries requiring assistance in establishing a reliable system of national tourism statistics. Trade agreements and investment policy that lead to the opening of markets can be beneficial to tourism, provided this is carefully handled to meet national sustainable tourism objectives. At the same time, actions should be pursued which provide an enabling environment for the development of small local enterprises, including improving linkages between tourism and other sectors, such as agriculture, handicraft and other creative industries, and between businesses. Above all, there is a need to ensure that tourism products and services are in line

¹ UNWTO and UNEP (2005) *Making Tourism More Sustainable – A guide for policy makers*

with the requirements of growth markets, with actions in place to improve quality standards, fill product gaps and pursue effective marketing strategies, including the use of new media, which have transformed the promotion of travel and tourism. The need to underpin the resilience of the sector should also be addressed.

The third pillar, covering **employment, decent work and human capital**, reflects the fact that tourism is fundamentally a people-based activity. Careful planning of human resources, involving consultation with private enterprises and employee representatives, is needed to ensure that tourism can fulfil its employment creation potential and has a sufficient supply of suitably skilled labour to meet future growth. The decent work agenda, addressing income, working conditions, personal development, freedom of expression and equal opportunity, should be backed by labour laws that are respected across the sector. Finally, there is a need to clearly understand where the skills gaps in the public and private sector lie, and ensure that accessible training is available to meet them, both at managerial and vocational level and with attention paid to the provision of skills in areas relevant to the sustainability of tourism and its contribution to the green economy, such as in environmental management.

Pillar four, on **poverty reduction and social inclusion**, focuses on the special opportunities presented by tourism, as a labour intensive and diverse sector, for benefiting poor and disadvantaged people. This requires commitment from government and the private sector at a national and local destination level, with relevant policies and tools, such as value chain analysis, to determine which interventions can best take place to support poor communities. A range of mechanisms have been identified for increasing the proportion of tourism income that reaches and benefits the poor, involving employment, supply chains, working with informal traders and enterprise formation and, more widely, the application and use of tourism charges, voluntary giving, and collateral benefit from tourism investment. Particular attention should be paid to the needs of women, minorities, disabled people, and the elderly and young people, all of whom can engage effectively in the tourism sector. This pillar is also concerned with measures to prevent or minimise the potential negative social impacts of tourism, such as competition for land, water and other resources, and unwanted social change, including crime and sexual exploitation. This emphasises the need to ensure that local communities are consulted, engaged and empowered to influence decisions on tourism development and operations that may affect their livelihood and society.

Pillar five covers the **sustainability of the natural and cultural environment**, recognising that tourism has a unique reason to be concerned about these issues owing to its dependency on the appeal of unspoilt landscapes and accessible local heritage, including the importance of the sustainable consumption of natural resources such as water and energy. Policies and actions to conserve cultural and natural assets and biodiversity, including through the expansion and effective management of protected areas, are important for tourism. Likewise the sector itself should ensure that its actions help to conserve and safeguard these assets rather than threaten them. The contribution of tourism to climate change, especially through emissions from transport and accommodation enterprises, requires mitigation measures to be taken globally and locally. At the same time it is critical that the sector adapts to the impact of climate change, in the way that tourism is planned, for example on coasts, and in terms of the effect on markets. In general, actions should be taken to promote sustainable production and consumption in the sector, including reducing the use of resources such as water and energy. Instruments such as planning controls, impact assessment, certification and financial incentives should be used to increase sustainability in both the development and the operation of tourism businesses, taking account of international experience, standards and conventions. In turn, this requires effective measurement and monitoring of the impacts of the sector, through the use of appropriate indicators.

In addition to the questions identified under each pillar as the basis for assessment, the document provides suggestions for relevant actions to take, presents illustrative examples of good practice and identifies a set of related services that are available from international bodies, which are set out fully in an Annex.

Introduction

Tourism is one of the largest and fastest growing economic sectors in the world, and has a considerable role to play in delivering sustainable development in many countries. At the same time it must be well managed so that it benefits local communities and the natural and cultural environments upon which it depends.

In recognition of the considerable opportunities and issues involved in the development of tourism, in 2012 the European Commission's Directorate-General for Development and Cooperation – EuropeAid established the project "Enhancing capacities for sustainable tourism for development in developing countries". This document is the main output from the aforementioned project. The project was undertaken in collaboration with the World Tourism Organization (UNWTO) which was commissioned to prepare this document.

The approach has been based on the experience of UNWTO and its work with a wide range of partner agencies and governments. In particular, the results of the study have been field tested in six countries during and following the preparation of the document, namely Kenya, India, Vietnam, Senegal, Botswana and Timor-Leste.

The purpose of the study

The purpose of the study is to enhance common understanding and commitment about Sustainable Tourism and to demonstrate how it is a vehicle to foster economic and social growth, through the achievement of development imperatives, while minimizing negative social, cultural and environmental impacts.

The document is aimed at two main audiences:

The EU and other development assistance agencies – to help them understand and identify opportunities to assist the tourism sector in delivering sustainable development.

Governments and other stakeholders within developing countries – to help them identify where they may need to strengthen their approach to sustainable tourism, and if necessary to seek assistance, within the context of international priorities and policies for sustainable development.

In particular the document provides a basis for discussion between the above two groups in agreeing on priorities and actions for supporting sustainable tourism.

The study is seen as informing the existing cooperation frameworks and common assessment and coordination processes in Official Development Assistance and Aid for Trade. This applies particularly in the field of trade, in which tourism plays an important part, including the work of the Enhanced Integrated Framework in promoting Diagnostic Trade Integration Studies and in the delivery of Aid for Trade. The study contributes to the positioning of tourism within the overarching framework for action on green growth, poverty eradication and sustainable development post-2015, stemming from Rio+20 and addressed by the European Commission in Communication (2013) 92 A Decent Life for All: Ending poverty and giving the world a sustainable future².

The significant opportunity now offered by tourism as a component of Aid for Trade is confirmed by the rapid growth in AfT disbursements to tourism in the last five years (greater than for any other sector). Nevertheless it still accounts for only 0.4% of all AfT disbursements³ despite accounting for around 4% of GDP in low income countries, underlining that the sector remains underrepresented in AfT given its high potential as a tool for sustainable development.

² http://ec.europa.eu/europeaid/documents/2013-02-22_communication_a_decent_life_for_all_post_2015_en.pdf

³ OECD Creditor Reporting. See Section 5 of the Guidance Note for more details

The structure of the document

The document is in three main parts:

Part 1 summarizes some key aspects of tourism in developing countries and presents the essential principles of sustainable tourism. As tourism is a crosscutting sector, this part will shed some light on how the EU's policy framework such as the Consensus for Development and the Agenda for Change can relate to the various aspects of tourism. The identified aspects are extensively covered in the 5 Pillars of Sustainable Tourism explained in Part 2: Methodology.



GUIDANCE NOTE

Part 2 provides the substance of the approach. It takes each of the five Pillars of Sustainable Tourism in turn. Under each it presents and discusses in detail a number of themes, issues, opportunities and challenges, leading to a set of questions to assess whether and how they are being addressed. Possible actions are identified to improve the situation, supported by some illustrative case studies, and links are made to relevant existing services (set out in an Annex).



METHODOLOGY

Part 3 provides data and evidence on tourism and its relationship to development, defining as well challenges related to measuring the socioeconomic impacts. It includes statistics on tourism growth and trends in the sector for various types of countries, followed by an analysis of the relationship with economic and social variables including GDP, exports, employment, gender and other sustainability concerns. It covers issues pertaining to financing tourism for development.



SITUATION ANALYSIS

NB: Please note that some of the information in this document (including Assessment questionnaires for Pillars, tables and explanatory leaflets) can be found or downloaded on: <http://icr.unwto.org/en/content/devco-study-sustainable-tourism-development>.

PART 1

GUIDANCE NOTE

The purpose of this Guidance Note is to provide:

- orientation in the field of sustainable tourism and its relationship to EU development policies; and
- direction on the process of assessing needs and prioritising possible interventions in the sector, using the Methodology contained later in Part Two of this study.

The Guidance Note starts by summarising some key aspects of tourism in developing countries and outlining the essential principles of sustainable tourism. It then relates these to 5 Pillars that contain the key issues for sustainable tourism as a development tool and provide the framework for the study and the methodological approach found in Part 2 Methodology. It shows how these 5 Pillars relate to key development priorities, using the example of the EU's policy framework. Finally, it explains how the approach can be used to inform the identification and prioritisation of possible interventions in the tourism sector.

1 Sustainable Tourism as a Development Tool

Over the last fifty years tourism has become one of the largest economic sectors globally, accounting for some 9% of the world's GDP and over 200 million jobs.

International tourist arrivals have grown steadily over many years and in 2012 stood at 1035 million. In the last ten years, this growth has been particularly marked in the emerging economies, where it has averaged 5.6% per annum, compared with 1.8% for advanced economies. UNWTO predicts that growth trends in world tourism will continue, with total arrivals reaching 1.8 billion by 2030. Again, emerging economies, including developing countries, stand to see the highest rate of growth.

Tourism accounts for a significant proportion of world trade. It makes up a major proportion of exports in services – accounting for 29% worldwide and as much as 52% for LDCs.

In 2012, international tourists spent US\$386 billion in emerging market and developing countries, over five times the level of official development assistance which goes to these countries. It is one of their main sources of foreign exchange earnings.

When analysing tourism development trends world-wide, at least three main conclusions can be drawn in connection with tourism and its potential for poverty alleviation:

1. Tourism is one of the most dynamic economic sectors in many countries, developed but also developing ones, with a wide range of upstream and downstream effects on other economic activities thanks to a very large and diversified supply chain.
2. Tourist movements towards developing and least developed countries are growing faster than in the developed world, accounting now for almost 50% per cent of total international tourist arrivals; Many developing countries do have assets of enormous value to the tourism sector, such as culture, art, landscape, wildlife and climate, and are very well positioned to develop tourism as a key sector contributing to economic growth.
3. Tourism in many developing and least developed countries is one of the principal sources, and in some countries the main source, of foreign exchange earnings and, quite often, the most viable and sustainable economic development option, with positive impacts on reducing poverty levels.

The impact of tourism as a driver of development has been felt in many countries. For example, in recent years tourism was a main factor in the graduation of Botswana, the Maldives and Cape Verde from their status of LDC.

While tourism is a major force for development it has a number of negative aspects:

- Tourism is a significant and growing contributor to climate change, currently accounting for around 5% of global CO₂ emissions, mainly generated by transport but also by the operation of tourism facilities such as accommodation.
- Local pollution of land and water from poor treatment of solid and liquid waste by tourism businesses and from the activities of tourists can be a problem in some areas
- Accommodation businesses are often major users of non-renewable and precious resources, such as land, energy and water. In some areas a resort may consume many times more water per person than the local community with which it competes for supply.

- Poorly sited tourism development and inappropriate activities can be very damaging to biodiversity in sensitive areas. Negative impacts to cultural heritage sites can occur where there is poor visitor management.
- Tourism can have negative impacts on local society, through restricting access to land and resources and leading to an increase in crime, sexual exploitation and threats to social and cultural traditions and values.
- While tourism is well placed to generate accessible jobs, poor working conditions are sometimes found in the sector.
- The economic performance of the sector is susceptible to influences on source markets, such as economic conditions, natural events and security concerns, although recovery may be rapid when circumstances change.

All of the above negative aspects underline the need for tourism to be very carefully planned and managed in developing countries. This requires governments to establish and implement clear policies on the control and management of the sector, in conjunction with all tourism stakeholders.

In order to develop the tourism sector in a sustainable manner and enhance the local socio-economic impact from tourism, many developing countries have made tourism a priority in their national development policies, and are trying, with the support of donors and development organisations, to formulate and implement interventions to increase tourism's contribution to poverty reduction. The European Commission is well positioned to support this process by developing a comprehensive methodology to identify the challenges, relevant needs and new opportunities for sustainable tourism, and support selected developing countries in formulating and implementing sustainable tourism development projects. The process is highly relevant to new orientations for the application of development assistance emanating from Rio+20 and within a new overarching framework post- 2015⁴.

The principles of sustainable tourism

A fundamental requirement of the tourism sector is that it should embrace the principles of sustainable tourism and focus on the achievement of sustainable development goals.

Sustainable tourism should not be regarded as a separate component of tourism, as a set of niche products, but rather as a condition of the tourism sector as a whole, which should work to become more sustainable.

The UNWTO has defined sustainable tourism as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"⁵.

A further elaboration of sustainable tourism by UNWTO refers to the need for it to:

- Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

⁴ European Commission (2013)- ibid.

⁵ UNWTO and UNEP (2005) Making Tourism More Sustainable – A Guide for Policy Makers

- Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

More specifically UNWTO and UNEP identified 12 Aims for sustainable tourism which are set out in Box 1.1⁶.

Box 1.1: 12 Aims for Sustainable Tourism

- 1 ECONOMIC VIABILITY:** To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.
- 2 LOCAL PROSPERITY:** To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.
- 3 EMPLOYMENT QUALITY:** To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.
- 4 SOCIAL EQUITY:** To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.
- 5 VISITOR FULFILMENT:** To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.
- 6 LOCAL CONTROL:** To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.
- 7 COMMUNITY WELLBEING:** To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.
- 8 CULTURAL RICHNESS:** To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.
- 9 PHYSICAL INTEGRITY:** To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment
- 10 BIOLOGICAL DIVERSITY:** To support the conservation of natural areas, habitats and wildlife, and minimize damage to them.
- 11 RESOURCE EFFICIENCY:** To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.
- 12 ENVIRONMENTAL PURITY:** To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

UNWTO and UNEP, 2005

⁶ ibid

It can be seen from the above that the sustainable tourism agenda is a broad one. It is as much about delivering economic benefits to destinations and communities, through competitive, viable tourism businesses that create employment, as about minimising adverse impacts on the environment.

A fundamental characteristic of the tourism sector is its ability to link the economic, social, cultural and environmental aspects of sustainability and to act as a driving force for their mutual enhancement. This is because tourism as an economic activity is highly dependent on the presence of intact environments, rich cultures and welcoming host communities. The opportunity that tourism brings to deliver income and jobs from cultural experiences is just one example of this. In turn, this places a heavy responsibility on the sector to address the social, cultural and environmental impacts of its own developments and operations.

Stakeholder roles and relationships in sustainable tourism development

Tourism is a multi-faceted activity. Many different stakeholders are potentially engaged in the sector or are affected by it, directly and indirectly. Table 1.1 identifies the main types of stakeholder and their roles in the delivery of sustainable tourism. Those same stakeholders might require assistance at various levels.

Table 1.1: Stakeholders and roles in sustainable tourism

Stakeholder type	Role in delivering sustainable tourism
<u>International development assistance agencies</u> Multilateral agencies and programmes Bilateral agencies	Integrating tourism in development policies and agreements Financial and technical assistance to sustainable tourism and individual programmes and projects
<u>National Government</u> Tourism Ministry Other Ministries ⁷ Tourism agencies, e.g. Tourist Board Other government delivery agencies Resource management bodies e.g. National Parks Service	Tourism policy and strategy development and implementation Relating tourism to wider policies and strategies Legislation, standards and regulation relating to the sector Infrastructure planning and development Resource management Communication, information and marketing
<u>Local Government and destination bodies</u> Regional government Local authorities e.g. District Councils Destination management organisations, e.g. public-private	Local strategic direction and planning Implementation of policy and regulations Local infrastructure development and management Stakeholder engagement, coordination and support
<u>Private sector businesses</u> Tourism trade associations, national and local Tourism service providers. e.g. hotel businesses Tour operators – international and incoming Suppliers to the sector, e.g. food producers Investors – international and domestic	Representation of, and influence on, the tourism sector Operation of tourism services Link to domestic and international markets Product development, investment and improvement Employment creation and generating local income Reflecting economic, social and environmental sustainability issues in development and operations
<u>Employees and related bodies</u> Labour unions Individual workers in the sector	Representing interests of employees Human resources planning and development Provision of a reliable service in return for income

⁷ Many other ministries have responsibilities that influence tourism, as discussed under Sub-pillar 1.3 and shown in Annex 3.

<u>NGOs – International, national and local</u> Sustainable development NGOs Environment, conservation and cultural NGOs Social and community NGOs	Representing different stakeholder interests Engaging in strategic planning and development Stakeholder coordination and supporting implementation Capacity building and provision of expertise
<u>Education and training bodies</u> Universities, colleges and teaching bodies Research institutions Technical experts and advisory bodies	Knowledge gathering and dissemination Supporting policy and strategy development Capacity building and training Specific advice and expertise
<u>Local community</u> Community councils and representative bodies Traditional structures –e.g. tribal chiefs/bodies Organised groups, e.g. women, youth Local formal and informal traders Individual households	Engaging in planning and decisions on tourism at a local level Representing and communicating local community interests Pursuing equitable benefit sharing within communities Interacting with tourists to mutual benefit Receiving income from tourist spending
<u>Consumers/tourists</u> Individual tourists Consumer networks, clubs and societies Travel media and social media users	Providing the main source of income to the sector Behaving responsibly towards the environment and local communities in travel choice and actions Communicating information and opinions on destinations and sustainability issues accurately and fairly

The approach taken in this study is related throughout to the stakeholders identified in Table 1.1. Many of the questions posed in the assessment process concern the execution of their roles and whether they have sufficient capacity to do this effectively.

While Table 1.1 shows the role of each type of stakeholder in delivering sustainable tourism, it is important to recognise that many of them have the potential to cause negative impacts or inhibit the sustainability of the sector through failing to fulfil these roles or through executing them poorly. For example, governments may not engage effectively in planning and management, businesses may pursue exploitative actions and tourists may not care about their impacts. The Methodology presented in Part Two of this document contains questions which probe whether such problems and barriers exist and whether they are being addressed.

The stakeholders should not be considered in isolation and the relationships between them should be understood. A key requirement to achieve sustainable tourism is for tourism enterprises to be responsible in their actions towards the environment, employees and the local community. Government at a national and local level provides the policy and strategic framework as well as legislation and regulations that influence the performance of other stakeholders. NGOs have a highly important role to play in strengthening relationships and coordination between stakeholders and providing advice and expertise.

A fundamental requirement for sustainable tourism is for the various stakeholders to work effectively together in the planning and management of the sector and the implementation of projects and activities. This should be based on the development of effective coordination and partnership structures, both at a national level and within local destinations. This is covered fully in the Methodology in Part Two (Pillar 1, sub-pillar 1.3).

2 Key Issues for Sustainable Tourism

The methodological framework (Part 2 Methodology) followed in this study is shaped around five pillars. These have been identified by UNWTO from many years of experience in working on the sustainable development of the tourism sector. Taken together, these pillars cover the thematic areas which could be addressed through future projects and interventions.

Each of these pillars is strongly related to the aims of sustainable tourism and this is reflected in how they are treated in the Methodology in Part 2.

1. Tourism policy and governance

This pillar concerns the recognition of tourism in sustainable development policies and the presence and implementation of a clear tourism strategy that embraces sustainability principles. It looks at tourism governance structures, including tourism ministries and institutions and how they relate to other areas of government that affect its sustainability and performance. It also considers the presence of structures and mechanisms for engaging public, private and third sector stakeholders, including local communities, at different levels.

This first pillar sketches the policy and regulatory framework and the institutional set up required to address the full set of 12 aims for sustainable tourism, mentioned in Box 1.1, whereas each of the pillars two to five provides more in-depth insight into one or a few of the aims for sustainable tourism.

2. Economic performance, investment and competitiveness

This pillar considers the business and investment environment and the position of trade liberalisation in the tourism sector, including the consequences for the local economy, small businesses and sustainability in general. It looks specifically at issues of market access, product quality and the resilience of the sector. It recognises the need for sound data to inform tourism planning and management.

Pillar 2 particularly focuses on aim 1 Economic Viability, and also touches upon aim 2 Local Prosperity and aim 5 Visitor Fulfilment.

3. Employment, decent work and human capital

The role of tourism as a generator of employment is a key aspect of its contribution to sustainable development. This pillar is concerned partly with the planning of human resources to meet the needs of the sector and partly with the quality of jobs provided, including conditions of employment. Skills assessment and provision of relevant training and capacity building is covered as a specific theme.

Pillar 3 directly relates to aim 3 Employment Quality

4. Poverty reduction and social inclusion

This pillar focuses on the contribution of tourism to poverty reduction. It considers a strategic approach to pro-poor tourism at a destination level, employing techniques such as value chain analysis. It then considers specific initiatives to gain more benefit for the poor, based on seven mechanisms identified by UNWTO, including strengthening local supply chains, working with the informal sector, developing community-based initiatives and securing collateral benefits from tourism.

Pillar 4 addresses aim 2 Local Prosperity, aim 4 Social Equity, aim 6 Local Control and aim 7 Community Wellbeing.

5. Sustainability of the natural and cultural environment

The critically important relationship between tourism and natural and cultural heritage is a key theme of this pillar, considering policies and actions to conserve the asset base, to manage tourism in sensitive areas and secure benefits from it. Specific attention is paid to mitigation and adaptation of the tourism sector to climate change. Finally, the use of mechanisms to improve the sustainability of tourism development and operations, and to monitor impacts, is assessed.

Pillar 5 is particularly relevant for the aims 8 to 12 on Cultural Richness, Physical Integrity, Biological Diversity, Resource Efficiency and Environmental Purity.

Part 2 Methodology involves an assessment of the situation in the country with respect to each of the pillars. Table 1.2 shows how each pillar relates to the aims for sustainable tourism as outlined above. It also lists a set of sub-pillars which contain the topics covered in the Methodology and which are looked at in detail in Part 2.

Table 1.2: Relating the Pillars and Sub-Pillars to the 12 Aims for Sustainable Tourism

Sustainable Tourism Pillars and Sub-Pillars (see in Part 2 Methodology)	Aims for Sustainable Tourism (UNWTO-UNEP Box 1.1)
1. Tourism policy and governance 1.1 The position of tourism in development policies and programmes 1.2 Tourism policy and regulatory framework 1.3 Tourism governance and institutional setup	All the 12 Aims
2. Economic performance, investment and competitiveness 2.1 Measuring tourism and its contribution to the economy 2.2 Trade, investment and the business environment 2.3 Brand, marketing and product positioning 2.4 Resilience, security and risk management	1. Economic Viability 2. Local Prosperity 5. Visitor Fulfilment
3. Employment, decent work and human capital 3.1 Human Resources planning and working conditions 3.2 Skills assessment and the provision of training	3. Employment Quality
4. Poverty reduction and social inclusion 4.1 An integrated approach to poverty reduction through tourism 4.2 Strengthening pro-poor tourism initiatives 4.3 The inclusion of disadvantaged groups in the tourism sector 4.4 The prevention of negative social impact	2. Local Prosperity 4. Social Equity 6. Local Control 7. Community Wellbeing
5. Sustainability of the natural and cultural environment 5.1 Relating tourism to natural and cultural heritage 5.2 Focussing on climate change 5.3 Enhancing sustainability of tourism development and operations 5.4 Measuring and monitoring tourism impacts	8. Cultural Richness 9. Physical Integrity 10. Biological Diversity 11. Resource Efficiency 12. Environmental Purity

While these five pillars are treated separately in Part 2 Methodology, it is important to recognise the relationship between them. This should be borne in mind in the assessment process, recognising where the answers to some of the questions raised may have a bearing on the assessment of different pillars.

3 Relating Tourism to Development Priorities

The decision on whether and how to use and support tourism as a means to achieving sustainable development objectives will largely be taken by individual development assistance agencies, including the European Union, within each country.

Each agency or delegation will need to consider how tourism relates to their country priorities and programmes, which are agreed through discussion with government. The extent to which such priorities and programmes are already determined or are being formulated will depend on the timing within a programme cycle, which may affect the degree of flexibility in pursuing new areas for support.

In many cases, prioritisation of development assistance may not be sector specific, but rather be driven by more generic aims and development objectives. These may relate to broad development and sustainability concerns, such as resource use, health, welfare, employment and livelihoods, and to enabling conditions and processes, such as good governance, education and skills development. Tourism, as a multi-faceted economic activity, can play a positive role in achieving these objectives and, in turn, can be assisted by interventions that relate to them.

The priorities of agencies may partly be determined by overarching policies. An example is the **European Consensus on Development**, established in 2006 as the basis of the EU development policy, which contains nine priority areas. **Table 1.3 shows how tourism relates to each of them.** It also shows how the priority areas relate to the sub-pillars in the Methodology.

A further elaboration of EU priorities is contained in Communication 637 of 2011 – **EU Development Policy: An Agenda for change**. This confirmed the relevance of the existing policy principles as set out in the European Consensus on Development, while concentrating its development cooperation on two main priorities: human rights, democracy and other key areas of good governance; and inclusive and sustainable growth for human development. Within each of these two properties, the Agenda identifies the areas where the EU should focus its support. **Tourism is relevant to most of these areas, as described in Table 1.4.** The table also shows how the sub-pillars in the Methodology relate to these areas.

Table 1.3: Relating tourism to the European Consensus on Development (ECD)

Areas for community action	The relevance to tourism	Tourism Pillars and Sub Pillars
Trade and regional integration		
The environment and the sustainable management of natural resources		
Support is given for incorporating environmental considerations into development. Attention is given to the sustainable management and preservation of natural resources, including as sources of income and local livelihoods. Policies focus on biodiversity loss and sustainable land and forest management. Support is given to the implementation on the EU Action Plan on Climate Change, including adaptation activity in developing countries, and for	Tourism has a special relationship with the environment, as it largely depends on a clean and attractive environment but also consumes natural resources. It is ideally placed as a source of income related to the conservation of natural heritage. As a sector it is vulnerable to the effects of climate change and needs to be part of adaptation strategies and activities. It should also contribute to mitigation activity while being aware of the effect of global mitigation on	Pillar 5: Sustainability of the natural and cultural environment 5.1 Relating tourism to natural and cultural heritage 5.2 Focussing on climate change 5.3 Enhancing sustainability of tourism development and operations 5.4 Measuring and monitoring tourism impacts

<p>promotion of sustainable consumption and production.</p>	<p>travel patterns. The sector is becoming increasingly aware of the need to engage in environmental management.</p>	
Infrastructure, communications and transport		
<p>The EU is committed to the improvement and provision of good quality infrastructure as a key ingredient for sustainable development. Efforts are made to provide developing countries with efficient and sustainable transport, sanitation, energy, information and communications systems and technologies through support at various levels. Priority is given to partner countries' strategies, and the creation of partnership with the private sector is also supported.</p>	<p>Transport is a critical resource for the tourism sector, which is both a user and a contributor to its development. Other infrastructure provision is also highly important for the sector, including energy, ICT and other services. Policies on infrastructure, communications and transport are highly relevant to issues of spatial planning and area development of tourism as may be identified in a tourism master plan. Tourism's support for infrastructure investment can be a factor in poverty reduction.</p>	<p>Pillar 1: Tourism policy and governance 1.2 Tourism policy and regulatory framework 1.3 Tourism governance and institutional setup Pillar 2: Economic performance, investment & competitiveness 2.2 Trade, investment and the business environment</p>
Water and Energy		
<p>Integrated water management aims to ensure sufficient and good quality drinking water, adequate sanitation and hygiene for every human being, ensuring long term protection of water resources, preventing deterioration and promoting sustainable use.</p> <p>Energy policy is focused on supporting a sound institutional and financial environment, awareness raising, capacity building, and fundraising in order to improve access to modern, affordable, sustainable, efficient, clean and renewable energy services.</p>	<p>The tourism sector is a sizeable user of water and energy. A range of measures should ensure that this is fully taken into account in the planning and design of new development. Action can also be taken to reduce use of these resources through influencing and working with private sector enterprises on measurement and management, assisted by guidelines, incentives and capacity building.</p>	<p>Pillar 5: Sustainability of the natural and cultural environment 5.3 Enhancing sustainability of tourism development and operations</p>
Rural development, territorial planning, agriculture and food security		
<p>The EU recognises that agriculture and rural development are critical to poverty reduction and growth. Support is provided for country-led, participatory, decentralized and environmentally sustainable territorial development, with the close involvement of beneficiaries in the identification of the interventions. A coherent policy environment is considered essential. The emergence of local development clusters is encouraged. High priority is given to food security and agricultural improvement.</p>	<p>Tourism is well placed to contribute directly to rural development as many rural areas are attractive to visitors. Opportunities may include the support for links between communities and established tourism businesses as well as the development of well researched community-based tourism projects and support for SMEs. Agriculture can be assisted through providing a market via the supply chain. Destination-level planning and implementation is encouraged.</p>	<p>Pillar 1: Tourism policy and governance 1.2 Tourism policy and regulatory framework Pillar 2: Economic performance, investment & competitiveness 2.2 Trade, investment and the business environment Pillar 4: Poverty reduction and social inclusion 4.1 An integrated approach to poverty reduction through tourism Strengthening pro-poor tourism initiatives</p>

Areas for community action	The relevance to tourism	Tourism Pillars and Sub Pillars
Governance, democracy, human rights and support for economic and institutional reforms		
Emphasis is placed on dialogue on governance as part of building a reform programme in a context of accountability, respect for human rights, democratic principles and the rule of law. Support is given to decentralisation and local authorities, including involving civil society and non-state actors as privileged partners for cooperation.	Good governance, involving the creation and operation for effective institutions and structures, is very important for tourism. Close cooperation between government and the private sector is essential. Decentralisation, leading to effective multi-stakeholder management structures for local destinations, is highly important for the sector.	Pillar 1: Tourism policy and governance 1.3 Tourism governance and institutional setup Pillar 3: Employment, decent work and human capital 3.1 Human resources planning and working conditions
Conflict prevention and fragile states		
Support covers conflict prevention, resolution and peace building. The approach seeks to build legitimate and effective state institutions and an active and organised civil society. It seeks to address root causes of fragility, such as poverty, and to strengthen early warning systems.	Tourism helps to generate awareness and understanding between peoples and has been seen as a force for peace. It can assist as an agent for poverty reduction. It is sensitive to unrest and requires risk and crisis management, including early warning, to be in place.	Pillar 1: Tourism policy and governance 1.3 Tourism governance and institutional setup Pillar 2: Economic performance, investment & competitiveness 2.4 Resilience, security and risk management Pillar 4: Poverty reduction and social inclusion 4.1 An integrated approach to poverty reduction through tourism

Table 1. 4: Relating tourism to the Agenda for Change (AfC)

AfC Specific areas of focus	AfC. Relevance to Tourism	Tourism Pillars and Sub-Pillars (see in Part 2 Methodology)
Human rights, democracy and other key elements of good governance		
General: Support for governance, in its political, economic social and environmental terms. An approach centred on political and policy dialogue with all stakeholders. Programmes or project interventions to support processes at local, national and sectoral levels.	Tourism as a sector relies on good governance. There is increasing recognition of the need for collaboration between public, private and other stakeholders within the sector, covering the economic, social and environmental aspects of tourism.	Pillar 1: Tourism Policy and Governance 1.3 Tourism governance and institutional setup. Also relates to other pillars on governance and management with respect to poverty and environment: 4.1 Integrated approach to poverty reduction through tourism 5.1 Relating tourism to natural and cultural heritage

AfC Specific areas of focus	AfC. Relevance to Tourism	Tourism Pillars and Sub-Pillars (see in Part 2 Methodology)
<p>Gender equality Empowerment of women as development actors</p>	<p>Tourism is sector which offers particular opportunities for women at all levels</p>	<p>Pillar 3: Employment, Decent Work and Human Capital 3.1 Human resources planning and working conditions</p> <p>Pillar 4: Poverty Reduction and Social Inclusion 4.3 Inclusion of disadvantaged groups in tourism sector</p>
<p>Public-sector management Need for better service delivery. National programmes to improve policy formulation, public financial management and institutional development.</p>	<p>Tourism should be effectively covered in development policies and in dedicated policies and strategies. Tourism bodies may need strengthening</p>	<p>Pillar 1: Tourism Policy and Governance 1.1 Position of tourism in development policies 1.2 Tourism policy and regulatory framework 1.3 Tourism governance and institutional setup</p>
<p>Civil Society and local authorities Supporting the emergence of an organised local civil society as a partner in dialogue with national governments. Mobilising local authorities' expertise.</p>	<p>Successful sustainable tourism at a local destination level requires the engagement of private sector and civil society bodies, including the local community, alongside knowledgeable local authorities.</p>	<p>Pillar 1: Tourism Policy and Governance 1.3 Tourism governance and institutional setup</p> <p>Pillar 4: Poverty Reduction and Social Inclusion 4.1 Integrated approach to poverty reduction through tourism</p>
<p>Natural resources Support for oversight processes and for governance reforms that promote sustainable and transparent management of natural resources and ecosystem services, with particular attention to dependence of the poor on them.</p>	<p>Tourism is dependent on the conservation on natural and cultural heritage and can provide income for the poor from their sustainable use. It needs to minimise its potential negative environmental impacts</p>	<p>Pillar 1: Tourism Policy and Governance 1.2 Tourism policy and regulatory framework</p> <p>Pillar 4: Poverty Reduction and Social Inclusion 4.2 Strengthening pro-poor tourism initiatives</p> <p>Pillar 5: Sustainability of the Natural and Cultural Environment 5.1 Relating tourism to natural and cultural heritage 5.2 Focussing on climate change 5.3 Enhancing sustainability of tourism development and operations 5.4 Monitoring tourism impacts</p>

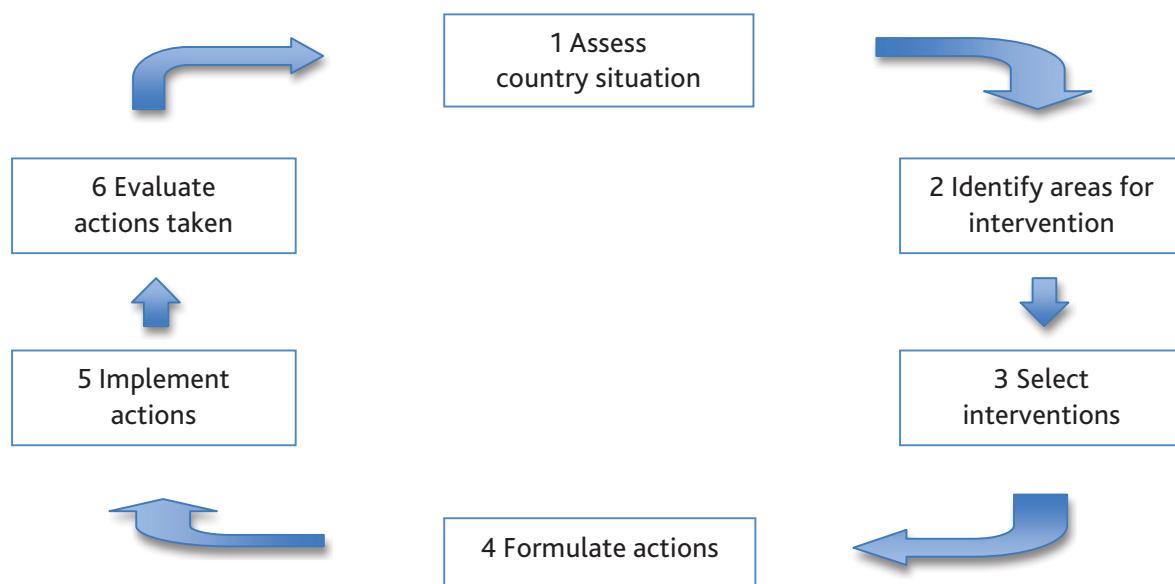
AfC Specific areas of focus	AfC. Relevance to Tourism	Tourism Pillars and Sub-Pillars (see in Part 2 Methodology)
Inclusive and sustainable growth for human development		
<p>General: Encourage inclusive growth and people's ability to participate in wealth and job creation. Promotion of decent work. Promotion of 'green economy', creating jobs and reducing poverty by valuing and investing in natural capital. Reducing unsustainable resource use and promoting resilience to climate change. Forging partnerships and promoting responsible business conduct.</p>	<p>Tourism is an accessible sector providing opportunities for people at all levels to gain local employment. It has been identified as a key sector in the green economy and provides a return from investing in natural capital. It needs to strengthen mitigation and adaptation to climate change. Responsible business practices are increasing in the sector.</p>	<p>Pillar 1: Tourism Policy and Governance 1.1 Position of tourism in development policies</p> <p>Pillar 2: Economic Performance, Investment and Competitiveness 2.2 Trade, investment and the business environment 2.4 Resilience and risk management</p> <p>Pillar 3: Employment, Decent Work and Human Capital 3.1 Human resources planning and working conditions</p> <p>Pillar 4: Poverty Reduction and Social Inclusion 4.1 Integrated approach to poverty reduction through tourism</p> <p>Pillar 5: Sustainability of the Natural and Cultural Environment 5.1 Relating tourism to natural and cultural heritage 5.2 Focussing on climate change 5.3 Enhancing sustainability of tourism development and operations 5.4 Monitoring tourism impacts</p>
<p>Social protection, health, education and jobs Supporting education and giving workforce skills that respond to labour market needs, supporting vocational training for employability. Reducing inequality of opportunity. Supporting the decent work agenda and regional labour mobility.</p>	<p>More can be done to promote decent work in the tourism sector, strengthen vocational training and access to employment and improve opportunities for all</p>	<p>Pillar 3: Employment, Decent Work and Human Capital 3.1 Human resources planning and working conditions 3.2 Skills assessment and the provision of training</p> <p>Pillar 4: Poverty Reduction and Social Inclusion 4.3 Inclusion of disadvantaged groups 4.4 The prevention of negative social impact</p>

AfC Specific areas of focus	AfC. Relevance to Tourism	Tourism Pillars and Sub-Pillars (see in Part 2 Methodology)
<p><i>Business environment, regional integration and world markets</i></p> <p>Supporting competitive local private sectors. Building local institutional and business capacity, promoting SMEs and cooperatives. Harnessing opportunities offered by globally integrated markets. Attracting and retaining private domestic and foreign investment and improve infrastructure. Developing public-private partnerships. Using new financial instruments, blending grants and loans, to leverage resources. Encouraging regional integration, e.g, in markets and infrastructure; tackling competitiveness gaps through trade agreements.</p>	<p>SMEs predominate in the tourism sector. Improving the business environment and strengthening capacity is important. Trade agreements and financial incentives can be used to encourage foreign and domestic investment, provided full attention is paid to sustainability concerns. Market presence and access, including via regional cooperation, is critical to success.</p>	<p>Pillar 1: Tourism Policy and Governance 1.3 Tourism governance and institutional setup</p> <p>Pillar 2: Economic Performance, Investment and Competitiveness 2.2 Trade, investment and the business environment 2.3 Brand, marketing and product positioning 2.4 Resilience and risk management</p> <p>Pillar 3: Employment, Decent Work and Capacity Building 3.2 Skills assessment and the provision of training</p>
<p><i>Sustainable agriculture and energy</i></p> <p>Tackling inequalities, to give poor people better access to land, food, water and energy without harming the environment. In agriculture, supporting sustainable practices and safeguard ecosystem services, focussing on rural livelihoods, producer groups, supply and marketing chains and responsible private investment. In energy, priorities include climate change and access to low carbon technologies and access to sustainable energy sources.</p>	<p>Tourism provides opportunities for creating alternative and additional employment in rural areas. It can be supportive of agriculture, providing a market for local produce through the supply chain. The need to increase efficiency in the use of energy in the sector and to support application of new technologies is recognised.</p>	<p>Pillar 4: Poverty Reduction and Social Inclusion 4.1 Integrated approach to poverty reduction through tourism 4.2 Strengthening pro-poor tourism initiatives</p> <p>Pillar 5: Sustainability of the Natural and Cultural 5.2 Focussing on climate change 5.3 Enhancing sustainability of tourism development and operations</p>

4 Stages in Identifying and Executing Interventions

The identification, design and execution of an intervention to enhance capacities for sustainable tourism can be seen as a staged process from assessment to the eventual evaluation of actions taken. This evaluation should feed into future assessment, so creating a cycle, which may be continuous, run just once, or repeated periodically.

This cycle relates to the Project Cycle Management model that has been used for project development and execution by European and other agencies. Project Cycle Management (PCM) is a term used to describe the management activities and decision-making procedures used during the life cycle of a project. The stages in the cycle are illustrated in the following diagram.



Each stage is outlined briefly below and is looked at in more detail in the remaining sections of this Guidance Note.

1. The cycle starts with the assessment phase. This involves a systematic process of assessing the situation in the country concerned with respect to the delivery of sustainable tourism. The assessment will follow the Methodology set out in Part 2 this study.
2. Part 2 Methodology will enable the identification of a range of areas where the country is weak in its approach to tourism and which should be addressed, assisted by capacity building. This may be quite a substantial list, depending on the country.
3. From this list of areas to address, a process of selecting interventions will need to be followed. This will involve considering the areas for intervention against the priorities of the development assistance agency (for example, the EU's policies as described earlier in tables 1.3 and 1.4) and as specifically identified in agreed programmes with government, as well as other factors concerning resourcing, time sequencing and achievability.

4. The interventions selected will need to be formulated into a set of actions to be undertaken. This will require close working with the government and stakeholders involved. Possible actions to address specific issues and needs identified are set out in the Methodology.
5. The actions should be implemented over a defined period of time. Management procedures, with clear responsibilities and reporting requirements, should be specified, agreed and followed.
6. Evaluation of actions should follow normal procedures for evaluation. This may involve the identification of indicators to use in monitoring outputs, outcomes and impacts.

At the outset, consideration should be given to the governance and management of the overall project. Individual agencies, including EU Delegations, may have precedent for this. In some cases it may be appropriate to establish a project management committee to initiate and give direction to the exercise and a project management unit to be responsible for execution and implementation.

The project should have clear ownership by the partner country. A key stakeholder will be the government and in particular the Ministry of Tourism (or other responsible ministry). It could also be a regional or local entity which has the authority for tourism. Given the fact that tourism is essentially an economic activity it is important that the private sector is closely involved from the outset. This may be achieved through engagement with the main tourism business association or set of representative bodies.

A joint public-private governance structure for tourism would be best placed to oversee the project and work with the results over time. In some countries such a structure may already exist. In others, the need to establish or strengthen such structures and collaborative processes (including government, the private sector, civil society and local communities) is likely to be identified through the assessment process and may be seen as an early action. These governance issues are covered in Pillar 1, sub-pillar 1.3, of Part 2 Methodology.

4.1 Starting Points in Practice

Almost all developing countries already have a certain level of development of tourism and some activity to develop and manage the sector. In turn, there is considerable variation between countries in the degree of engagement in tourism by governments and development assistance agencies. This may also have changed over time. Partly for these reasons, the context for considering interventions in tourism will vary.

The approach of this document is to provide a process whereby the situation in the sector and how it is supported can be assessed comprehensively across a range of topics and issues. Such a broad assessment can be most helpful in:

- Informing development assistance agencies where to intervene
- Informing governments where they may need most assistance.

In practice, interest in tourism may be generated more specifically at any one time by:

- A particular project or programme that has, or could have, a tourism component
- A specific request for assistance with a tourism project or initiative.

If the starting point is a specific priority area or project, it may be appropriate to focus on one or more relevant pillars within the Methodology. Nevertheless, it is still helpful to see this in a wider context by considering how it relates to a range of issues in the tourism sector.

The situation will be influenced by the kind of support that may be available from a development assistance agency. For example, aid modalities from the EU include budget support, which requires extensive dialogue with government leading to an agreement on areas of support and conditions to be met. Such support could be directed at and through particular sectors, such as tourism, which are able to demonstrate relevance to the overarching aims within the Agenda for Change. Thematic programmes, specific calls for proposals and provision of technical assistance are aid modalities which may enable support to be directly targeted at areas of need and opportunity. Most importantly, support for multi-faceted tourism projects through the allocation of Aid for Trade could turn out to have significant benefits for beneficiary countries, notably in terms of trade and employment creation and poverty reduction.

Further information regarding the European Commission Project Cycle Management approach can be found in the following document:

- Aid Delivery Methods PCM - Project Approach Guidelines" Source: DG EuropeAid. Release date: 2004.
- or in the European Commission website at the following link:
- http://ec.europa.eu/europeaid/how/delivering-aid/project-approach/index_en.htm

4.2 Assessment of the Situation and Identification of Needs

The assessment process is based on the Methodology, framed around the five pillars and sub-pillars (topics) listed earlier and presented in detail in the Part 2 Methodology of this document. The Methodology identifies for each sub-pillar a set of issues and questions which can be used to assess the situation in the country.

The **process of undertaking the assessment** and seeking answers to the questions can be followed in a number of ways, depending on the situation and resources available in each country. Some options include:

- The process is based on internal self-assessment by government, working with stakeholders, which is then subject to an element of verification
- The development assistance agency, e.g. the EU Delegation, undertakes the assessment itself in conjunction with government and other stakeholders
- An independent working group is appointed to undertake the assessment
- Consultants are appointed to undertake the assessment.

A significant amount of the information necessary to inform the assessment and to enable the questions to be answered should be available from **existing documentation**, which may be in hard copy or on-line. Key documents and other material include the following:

- Development policies and strategies
- Tourism policies, strategies and master plans
- Policy and strategy documents relating to: Trade and investment; Human Resources, including education and training; Environment and Natural Resources, including climate change; Culture.
- Tourism legislation (Tourism Bills, Acts etc.)
- Other primary legislation affecting the sector: Labour; Planning/Environment
- Annual Reports from Ministry of Tourism and tourism bodies (NTO, Associations)
- Published statistics on the performance of the tourism sector
- Promotional material and websites for the country.

In addition to looking at the above documentation, the main process for undertaking the assessment will be through a series of **consultations**. This will involve meetings with the main stakeholder groups including:

- Ministry of Tourism
- Official tourism bodies, e.g. National Tourism Organisation
- Other key Ministries including those responsible for development, finance, trade, employment, environment, natural heritage and culture
- Relevant government agencies, e.g. Environment Agency, Investment Promotion Agency etc.
- Regional Authorities
- Private sector tourism associations
- Key NGOs working in the field of development, poverty, communities and environment
- Universities and institutions engaged in tourism research and teaching.

It is important to appreciate that this should be treated as a rapid assessment process, to obtain an overall picture and identify apparent areas of weakness, and most importantly to relate identified needs and challenges with EU development priorities, such as shown in Table 1.3 and 1.4. It is not to be seen as equivalent to a comprehensive assessment and analysis of the tourism sector as may be undertaken in preparing a tourism strategy and master-plan. Indeed, the need for such an analysis may be identified to be addressed through an intervention resulting from this exercise.

The identification stage of the project cycle management follows from the assessment. The Methodology leads to the completion of a set of questionnaires which will contain answers to the questions raised in the form of short comments. A scoring system based on a scale of 1 to 5 is also included in the Methodology. While the questionnaires may help to inform consultation, it is intended that they are filled in subsequently rather than during discussions.

A combination of the comments and scores will lead to the identification of those issues which require most attention. Specific areas of need should be apparent from the answers to the individual questions. Based on this, a short paper should be produced which summarises the main areas of need and potential intervention, in the form of a long list from which a selection should be made.

4.3 Selection of Interventions

The process of selection of interventions to pursue from the long list that resulted from the assessment should be informed by consideration of the policy context and the feasibility and impact of the intervention. It should be the subject of discussion and negotiation with the government and other stakeholders. The original starting point for the exercise, as discussed earlier, will have a bearing on the selection.

The policy and strategic context for the selection and prioritisation can be found at various levels. The following are some of the key items to consider:

- The overall policies and priorities of the development assistance agency. For example, the relationship to the EU's Consensus on Development and Agenda for Change were presented earlier as a reference.
- The negotiated programmes with government. Examples include the Country Strategy Papers and National Indicative Programmes agreed between the EU and the partner countries. These may already indicate priority needs that tourism is well placed to address. An exercise should be undertaken to match these needs to the long list of interventions, so ensuring that priority is given to addressing weaknesses in areas which are already deemed to be important.

- Other development policies and strategies. Similar consideration should be given to other negotiated development strategies, such as the PRSPs⁸, and the government's own identified development needs and priorities.
- Existing tourism policies and strategies. In some countries these may already be in place and may provide a helpful analysis and set of objectives and identified actions to compare against the assessment and list of possible interventions. In this case, the approach will partly be about helping to implement the existing strategy.
- Specific tourism projects and proposals that already exist. It is important to consider any pre-identified projects that may have been well researched but are seeking resources to enable them to proceed.
- The position of other development assistance agencies. They may already be assisting tourism projects or be interested in doing so. Duplication should be avoided while opportunities for joint funding should be pursued. This may be informed by existing donor coordination bodies or mechanisms such as the UNDAF.

A further set of criteria for selecting interventions concerns the nature of the actual intervention. Consideration should be given to:

- The likely impact of a specific intervention - its ability to achieve development goals and make a difference.
- The amount of time it may take to implement the relevant actions.
- The level of resources required, both financial and human.
- The availability of existing "services"⁹ that could be used in the implementation. These may include those identified in the Part 2 Methodology and presented in Annex 1.
- The visibility that the intervention will bring to the agency. This may be particularly apparent from marketing and other public facing interventions.

The extent to which areas of implementation fit with the criteria of the various funding programmes that may be available in the country at the given time will also be a material factor. For example, the EU has a range of financial instruments that are applied to development and many of them are relevant to tourism.

The new Programme Cycle of the EU for 2014-20 will determine the pattern of instruments and how they are applied. These in turn should be related to EU policy priorities and to the needs of tourism, and most importantly looking at Aid for Trade. By way of illustration with respect to the priorities and instruments pertaining to 2013, the relationship between the nine priority areas for Community action within the European Consensus on Development, specific Programmes within these areas, EU Financial Instruments and the Pillars and Sub-pillars of the Methodology is illustrated in Annex 5. The European Financial Instruments are summarised in Annex 6.

In light of the commitment of the European Commission¹⁰ in the renewed framework for development stemming from Rio+20, sustainable tourism appears as an important sector to achieve sustainable development in the Post-2015 overarching framework. The Commission is seeking an integrated EU approach to financing and other means of implementation of the framework, related to the various global processes.

Finally, certain possible interventions may be affected by the availability of cross-border or regional funding programmes. These can be particularly important in the tourism sector, for example in assisting common programmes in the field of promotion, quality standards, access and transportation, and the conservation and management of natural assets such as in trans-boundary protected areas.

⁸ Poverty Reduction Strategy Papers

⁹ "Services" here refer to the Annex 1 in which a full range of technical delivery - called services- are included as a reference from the UN Steering Committee on Tourism for Development *Portfolio of Tourism Services*. <http://icr.unwto.org/en/content/sctd-portfolio-services>

¹⁰ In COM(2013) 92 *A Decent Life for All: Ending poverty and giving the world a sustainable future* (http://ec.europa.eu/europeaid/documents/2013-02-22_communication_a_decent_life_for_all_post_2015_en.pdf),

4.4 Formulation of Interventions and Actions

Once areas for intervention have been selected, work needs to be done on the formulation of the interventions and the planning of specific actions. The Methodology contains suggested actions relating to each of the issues within the sub-pillars. These should be considered and discussed with government and other stakeholders as a starting point for working up the intervention and actions to be delivered.

The actions set out in the Methodology tend to fall into the following general categories:

- Strengthening governance structures and processes
- Policy development
- Preparing or improving strategies and plans at different levels, both geographic and thematic
- Implementation of policies, strategies and plans
- Reviewing and strengthening legislation and regulations
- Undertaking research, studies and reviews to improve knowledge
- Improving the collection and dissemination of data
- Identifying needs and removing barriers
- Developing linkages and networks between stakeholders
- Designing and undertaking specific projects, including pilot projects
- Establishing or strengthening management systems and policy instruments, including incentives
- Raising awareness and strengthening communications of all kinds
- General and specific capacity building and training.

The Methodology also identifies a set of existing services that can be supplied by UNWTO and partner agencies, offering an integrated approach, within the UN Steering Committee on Tourism for Development¹¹. The details of each service are contained in Annex 1, ordered according to the index numbers shown in the Methodology. These services provide an opportunity for inclusion in the intervention. Where appropriate, they could be considered as a basis for intervention or within the formulation process.

4.5 Implementation and Evaluation of Actions

The size and nature of the implementation task will vary according to the scope of interventions and the actions identified.

Some actions, such as the preparation and execution of plans and projects, may take one or more years to implement. Others, such as specific capacity building exercises, may be completed in less than a month.

Implementation may be carried out in various ways, including directly by the partner government and tourism stakeholders or through the letting of contracts.

In whatever way the implementation occurs, success will depend on effective project management. The need to establish governance and management structures for this was referred to earlier in Section 5 of this Guidance Note.

All actions should be carefully designed with a clear and agreed allocation of responsibilities for implementation. A systematic process of checking and reporting on progress should be put in place.

Monitoring and evaluation procedures should be designed in from the beginning. This should include the identification of usable indicators that relate to the outputs, outcomes and impacts of the actions. Some

¹¹ <http://icr.unwto.org/en/content/un-steering-committee-tourism-development-sctd>

particular points about indicators and monitoring in relation to tourism are made in the Methodology in relation to sub-pillars concerning tourism policies (1.2), measurement (2.1) and impacts (5.4). Standard evaluation procedures, which may be required by the agency or other partners, could be applied to all interventions and should be followed.

5 The Way Forward: Tourism in the Aid for Trade and Green Growth Agenda

The approach taken in this document, outlined in this Guidance Note and the subsequent Methodology, provides a basis for developing support for tourism in the future. The provision of more assistance to tourism is well justified given the limited support it has received in comparison with other sectors while recognising its recent profile in the new high level agendas for sustainable development

The OECD collects information on the disbursement of Official Development Assistance (ODA) and tourism is identified as a separate subsector in the relevant data. The following Table 1.5 illustrates that Aft disbursements to tourism have significantly increased over time and were around 160 per cent higher in 2011 than in 2006. Yet those increases started from a very low base **and disbursements to the tourism sector represented around 0.4 per cent of total Aft disbursements in 2011**. Taking into account that tourism represented on average around 4 per cent of GDP in low income countries, the sector appears to be underrepresented when it comes to Aft flows. This discrepancy is particularly surprising as the development literature tends to emphasize the high potential of this particular sector in contributing to poverty reduction and sustainable development.

Participation in **Aid for Trade** such as, for example, the Enhanced Integrated Framework¹² for LDCs, provides a common platform for the EU and other development assistance agencies. As a trade based activity, tourism relates well to Aid for Trade and especially to three of its five categories of assistance: Trade Development; Building Productive Capacity; and Other Trade-related Needs. The EU has taken a strategic approach to Aid for Trade. Some priority areas of interest¹³ are identified below, together with reference to how these relate to the pillars and topics developed in Part 2 Methodology.

- Integration of trade in partner country's national development and poverty reduction strategies (Pillar 1 – 1.1 Position of tourism in development policies)
- Increasing private sector and civil society ownership and engagement in trade policies and actions (Pillar 1 – 1.3 Tourism governance and institutional setup; Pillar 2 – 2.2 Trade, investment and the business environment)
- Including poverty and gender issues in trade assessments and action plans (Pillar 4 – 4.1 Integrated approach to poverty reduction through tourism; 4.3 Inclusion of disadvantaged groups)
- Promoting environmental and social sustainability in Aid for Trade and national trade strategies (Pillar 3 – 3.1 Human resources planning and working conditions; Pillar 5 – 5.3 Enhancing sustainability of tourism development and operations)
- Strengthening regional and cross-border programmes (Pillar 1 – 1.2 Tourism policy and regulatory framework; Pillar 2 – 2.2 Trade, investment and the business environment)
- Coordinating and supporting donor capacity (All pillars and the overall approach).

¹² The multi-donor programme for trade-related assistance for LDCs

¹³ As expressed in the Strategy on Aid for Trade, European Union (2007), and more recent statements and annual monitoring reports.

Table 1.5 : Official Development Assistance and Other Official Flows by subsector, 2006-2011.

Category	Official Development Assistance (ODA)					Other official flows (OOF)				
	2006	2010	2011	Growth p.a. (%)	Share (%) in 2011	2006	2010	2011	Growth p.a. (%)	Share (%) in 2011
Trade Policy and Regulations	481	1170	982	15.4	2.9	53	379	232	34.2	0.8
02_Trade Facilitation	63	325	259	32.8	0.8	7	324	94	66.6	0.3
Economic	9336	17636	17740	13.7	52.6	3315	13498	14720	34.7	52.2
06_Transport and Storage	5232	9804	10165	14.2	30.1	2435	7322	8218	27.5	29.2
07_Communications	460	536	506	1.9	1.5	211	668	685	26.5	2.4
08_Energy Generation and Supply	3644	7296	7069	14.2	21	669	5508	5817	54.1	20.6
Building Productive Capacity	8427	14053	14999	12.2	44.5	3568	16226	13239	30	47
09_Business and Other Services	1439	1576	1600	2.1	4.7	16	1241	894	124.7	3.2
10_Banking & Financial Services	1370	2440	2699	14.5	8	1345	7602	5061	30.3	18
11_Agriculture	3080	6764	6549	16.3	19.4	725	1439	1135	9.4	4
12_Forestry	443	1200	1110	20.2	3.3	51	248	217	33.4	0.8
13_Fishing	206	343	351	11.2	1	1	52	7	39.3	0
14_Industry	1092	1402	2060	13.5	6.1	1193	3799	4448	30	15.8
15_Mineral Resources	745	172	464	-9.1	1.4	236	1728	1373	42.2	4.9
16_Tourism	51	155	167	26.8	0.5	0	117	104	223.2	0.4
Trade-related		68	17							
Total	18244	32927	33379	13.1	100	6937	30102	28191	32.4	100

Note: *ICT covers the categories Communications policy and administrative management, Telecommunications and Information

Source: *OECD Creditor Reporting System*

OECD-WTO-UNWTO (2013) Connecting Dev. Country Firms to Tourist Value Chains, WTO 4th Global Aid for trade Review

Tourism mainstreaming is gaining momentum in both the trade and the sustainable development agenda. In 2012, the significant contribution of tourism is for the first time recognized in the RIO+20 outcome document "The Future We Want" (UN General Assembly, 2012), where it is included as a thematic area and cross-sectorial issue demonstrating how tourism can be a catalyst for the three dimension of sustainable development.



RIO+20
 the future we want →

Sustainable tourism in The Future we Want Rio+20 outcome document

"130. We emphasize that well-designed and managed tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities (...)"

"131. We encourage the promotion of investment in sustainable tourism, including eco-tourism and cultural tourism, which may include creating small and medium sized enterprises and facilitating access to finance, including through microcredit initiatives for the poor, indigenous peoples and local communities in areas with high eco-tourism potential (...)"

Read more: <http://icr.unwto.org/en/content/rio20-future-we-want> (full outcome document)
http://dxttq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_greeneconomy_leaflet.pdf (Green Economy Report leaflet)

Furthermore, in the 10 Year Framework of Programmes on Sustainable Consumption and Production (10-YFP) - a concrete operational outcome of Rio+20 - sustainable tourism, has been identified as one of the five areas of programme development, owing to its multi-dimensional nature, its close linkages to other sectors, and its ability to create decent jobs and generate trade opportunities towards a greener growth.

Additional recognition of the role of tourism can be found in other sources. The *Green Economy and Trade Report* (UNEP, 2013) makes clear that developing countries in particular are likely to benefit from implementing green economy policies that scale up sustainable trade –including sustainable tourism amongst agriculture, fisheries, forestry, manufacturing, and renewable energy. Most importantly, the report *Connecting Developing Country Firms to Tourist Value Chains* (OECD-WTO-UNWTO, 2013) in the 4th Global Aid for Trade Review, identifies tourism as a high impact economic sector in trade in services for future Aid for Trade support. Tourism has also been identified as a priority sector for development in 90% per cent of Least Developed Countries (LDCs) according to studies conducted by the Enhanced Integrated Framework (EIF, 2012). The studies have found that tourism is becoming a significant sector for many LDCs with a direct link to poverty eradication (Francis, 2012).

The above references underline the recognition of tourism as a high impact sector in both the Aid for Trade and Green Growth agenda. The European Commission is well placed to respond to this call for action, within the context of the renewed framework for development for the Post 2015 Agenda, and its communication on *Ending poverty and giving the world a sustainable future COM (2013)92*.

Tourism is a rather complex sector, and people centred sector, with multiple forward and backward linkages. This suggests that relatively broad based projects targeting different segments of the tourism value chain and other sectors linked to the tourism sector may be best placed to generate high poverty reduction impacts from tourism and create employment. Tourism also has a special relationship with natural and cultural environments and with host communities. In order for Aid for Trade and Official Development Assistance to successfully achieving the millennium development goals (MDGs) and the eminent sustainable development goals (SDGs) that are being defined for the next decade and beyond, we may need to better understand the complexity of the tourism sector, which is the intention of this Guidebook.

Further information regarding the European Development policies and technical cooperation can be found in the following documents:

- "Tools and Methods Series - Reference Document No 6: Toolkit for Capacity Development" Source: DG Development and Cooperation – EuropeAid. Release Date: 2011.
- "Tools and Methods Series - Guidelines No 3: Making Technical Cooperation more effective" Source: EuropeAid. Release date: 2009.
- "Reforming Technical Cooperation and Project Implementation Units for External Aid provided by the European Commission - A Backbone Strategy" Source: DG EuropeAid. Release date: 2008.
- or in the European Commission website at the following links:
 - http://ec.europa.eu/europeaid/what/development-policies/index_en.htm
 - http://ec.europa.eu/europeaid/how/ensure-aid-effectiveness/reform_technical_cooperation_en.htm

PART 2

METHODOLOGY

How to Read and Use the Methodology

This Methodology provides a framework for assessing the approach to tourism in a developing country and the extent to which it is being pursued effectively as a tool for sustainable development.

The framework is based around 5 Pillars. Each of the pillars has been broken down into a series of topics (sub-pillars) and issues. These are shown in Table 2.1 below.

The 5 Pillars, 17 Sub-Pillars and 32 issues provide a basic agenda for assessing the situation in a country.

PILLAR 1 TOURISM POLICY AND GOVERNANCE

1.1 The position of tourism in development policies and programmes

Issue 1: The level of recognition given to tourism in development policies

Issue 2: The extent and nature of international assistance for sustainable tourism development

1.2 Tourism policy and regulatory framework

Issue 1: The existence of a tourism policy and strategic plans, sufficient to guide the development of tourism

Issue 2: The implementation and monitoring of the policy/strategy/plan

Issue 3: The adequacy of legislation and regulations affecting tourism

1.3 Tourism governance and institutional setup

Issue 1: The effectiveness of a central leadership structure for tourism

Issue 2: The engagement of stakeholder interests in national tourism governance

Issue 3: The involvement of the private sector and use of public-private partnerships

Issue 4: The effectiveness of tourism governance at a local level

PILLAR 2 ECONOMIC PERFORMANCE, INVESTMENT AND COMPETITIVENESS

2.1 Measuring tourism and its contribution to the economy

Issue 1: The quality of data collection and analysis

2.2 Trade, investment and the business environment

Issue 1: Recognition and treatment of tourism in trade and investment policies and commitments

Issue 2: Extent of tourism investment and conduciveness of the business environment

2.3 Brand, marketing and product positioning

Issue 1: Clarity and focus of the brand and marketing plan

Issue 2: Quality and diversity of the product offer

2.4 Resilience, security and risk management

Issue 1: Level of attention paid to risk and crisis management

PILLAR 3: EMPLOYMENT, DECENT WORK AND HUMAN CAPITAL

3.1 Human Resources planning and working conditions

Issue 1: The existence and scope of a Human Resources policy, plan and actions, discussed and agreed with the private sector and other stakeholders

Issue 2: Ensuring that workers' rights and conditions for decent work are met

3.2 Skills assessment and the provision of training

Issue 1: The level of understanding of skills gaps and training needs

Issue 2: The availability of sufficient training and capacity building programmes and institutions

Issue 3: The level of engagement of the private sector in supporting training and capacity building

PILLAR 4 POVERTY REDUCTION AND SOCIAL INCLUSION

4.1 An integrated approach to poverty reduction through tourism

Issue 1: Level of commitment to pro-poor tourism

Issue 2: Adopting a strategic approach to poverty reduction through tourism at national and destination level

4.2 Strengthening pro-poor tourism initiatives

Issue 1: Increasing income to poor communities from tourism businesses and trading

Issue 2: Securing wider community benefits from tourism

4.3 The inclusion of disadvantaged groups in the tourism sector

Issue 1: Effort to engage disadvantaged groups in tourism

4.4 The prevention of negative social impact

Issue 1: Effort to identify and address negative social impact

PILLAR 5 SUSTAINABILITY OF THE NATURAL AND CULTURAL ENVIRONMENT

5.1 Relating tourism to natural and cultural heritage

Issue 1: Effective policies and actions to conserve and promote natural heritage

Issue 2: Effective policies and actions to safeguard and promote cultural heritage

5.2 Focussing on climate change

Issue 1: Sufficient attention to climate change in the tourism sector

5.3 Enhancing sustainability of tourism development and operations

Issue 1: The extent to which tourism development respects sustainability

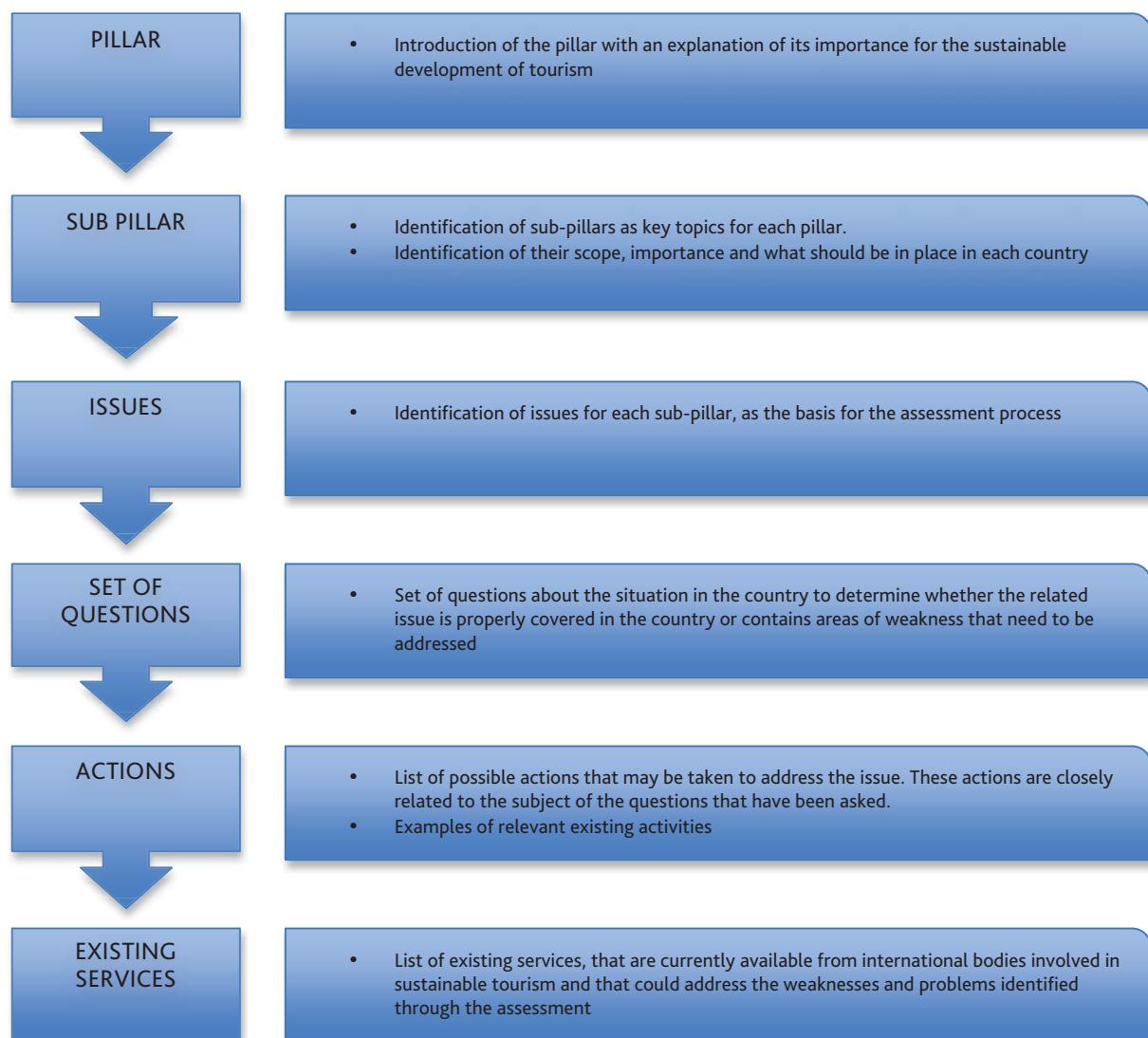
Issue 2: The extent to which tourism operations and activities respect sustainability

5.4 Measuring and monitoring tourism impacts

Issue 1: The extent of objective monitoring of environmental conditions and tourism impacts

Table 2.1: Framework for assessing tourism delivery and capacity

The Methodology follows a standard structure within each pillar, which is shown in the diagram below:



Firstly, the subject of the pillar is briefly introduced together with an explanation of its importance for the sustainable development of tourism.

Under each pillar a number of sub-pillars are identified. These are the key topics that a developing country should be addressing within each pillar. The scope of the sub-pillar is described, setting out why it is important and what should be in place in each country.

Within each sub-pillar, one or more issues are identified. The assessment seeks to determine whether these issues are properly covered in the country or contain areas of weakness that need to be addressed. The assessment process, which amounts to a problem analysis, involves seeking answers to a series of questions about the situation in the country relating to the issue. The questions are set out under the issue and are briefly elaborated.

At the end of each set of questions, a box is presented which contains a list of possible actions that may be taken to address the issue. These actions are closely related to the subject of the questions that have been asked.

The decision on whether or not to pursue any of these actions should be decided in each country by the stakeholders and international agencies, including the EU Delegations, informed by the assessment that has been undertaken.

Finally, a list is provided of services, related to the issue and possible actions that are currently available from international bodies involved in sustainable tourism. The services are referenced in the list, using a numbering system, and are described in Annex 1, which is ordered by reference number.

To assist in the assessment process, a questionnaire form is provided for each pillar. This simply repeats the questions identified in the text. It can be used to record the situation found and to make comments against each question. To facilitate a quick assimilation of the situation, a final set of columns on the form provides the opportunity to allocate a score. This provides an indication of where needs and priorities may lie for possible action, based on the following scale:

- 1 Area of particular need and/or opportunity – highest priority for action/intervention
- 2 Improvement required – should also be considered for intervention/support
- 3 May benefit from some improvement – but less current need for intervention
- 4 Appears to be satisfactory – maintain
- 5 Area of apparent strength – may provide an example to others
- X No information available to answer the question/ This could not be assessed

The scoring process is not scientific and is purely indicative. A score does not have to be given against every question. It should be based on the judgement of the assessor in the light of available material and consultation.

For users who wish to use the questionnaires as working documents to record comments and scores, they can be downloaded at <http://icr.unwto.org/en/content/devco-study-sustainable-tourism-development>.

In summary, the application of this methodological framework should enable an overall picture to be formed of how sustainable tourism is treated in the country and how the tourism sector can contribute to sustainable development. The answers to the questions, helped by the scoring process, should indicate where the main challenges lie. From this point, a process of identifying and prioritising possible actions will need to be followed. Selected actions should then be implemented. This may be facilitated by the design of a specific intervention which may involve the use of existing services.

Using the methodology flexibly

The Methodology can be used flexibly – it can be applied partially or completely according to circumstances. Users may wish to cover all pillars or focus on just one or two of them.

It is appreciated that not all the issues and questions set out here will be relevant or can be answered in every country or situation. They are presented to encourage thought and discussion and to guide stakeholders about what should be in place. If users do not wish to address each individual question, or wish to take a more general approach, they are still encouraged to read through the questions as a set, in order to inform their own thinking about the respective pillar or issue.

The questionnaires provided at the end of each pillar section can be used as a checklist or aide memoir. They do not have to be filled in methodically.

PILLAR 1: Tourism Policy and Governance

A clear policy, effectively implemented by governance structures that embrace a range of stakeholder interests, is essential for developing sustainable tourism. This is the central pillar to which all others relate.

The success of tourism as a development tool depends on awareness of the contribution and potential of the sector, the identification of strategic priorities, the clarity and relevance of the actions proposed, and the level of commitment to their implementation. This equally requires that the governance structures and processes that support and manage tourism are sound and effective. A key to this is the engagement of the private sector and other stakeholders alongside government both nationally and at a local level.

The importance of effective policy and governance has been confirmed by various studies. For example, a review of 35 Diagnostic Trade Integration Studies¹⁴ for LDCs concluded that a competitive tourism sector requires a coherent policy framework, efficient institutions, a proactive private sector and a national tourism development strategy that establishes cross-sectoral linkages¹⁵.

Three sub-pillars are identified for assessment:

- **The position of tourism in development policies and programmes**

The level of recognition by government and international agencies of the importance of tourism for the sustainable development of the country, reflected in overarching development policies and programmes.

- **Tourism policy and regulatory framework**

The presence of well formed, agreed and implemented policies, strategies and plans that provide direction for the development and management of sustainable tourism, supported by necessary legislation and regulations.

- **Tourism governance and institutional setup**

The structures in place to oversee the development, management and coordination of tourism, implement policies and take action, with a focus on multi-stakeholder collaboration including public-private partnerships.

1.1 The position of tourism in development policies and programmes

Tourism is increasingly being recognised as a powerful sector capable of stimulating and driving economic and social development. In recent years many LDCs and other developing countries have focussed on the sector as a development tool¹⁶. The ability of tourism to stimulate exports, provide accessible jobs and alleviate poverty, often in areas unsuited to the development of other sectors, has been referred to elsewhere in this study.

Recognition of the current and potential contribution and role of tourism in achieving a country's overall development goals is a first and essential step in strengthening policies and actions to support sustainable tourism development. This can be critical to unlocking support for the sector.

¹⁴ These studies (DTIS) provide important guidance for developing and delivering coordinated support through the Enhanced Integrated Framework (EIF)

¹⁵ UNDP (2011) Discussion Paper – Tourism and Poverty Reduction Strategies in the Integrated Framework for Least Developed Countries, A report based on collaboration with the UN Steering Committee on Tourism for Development (SCTD).

¹⁶ Ibid

One way in which such recognition can be given is through the treatment of tourism within studies, frameworks and initiatives that establish and support the country's development strategy. These include high level papers prepared in conjunction with the European Union, UN Agencies and other bodies, including those listed below and described in more detail in Annex 2. The latter contains evidence from a number of research studies which suggest that there is considerable variation in the treatment of tourism between the different countries in the strategy papers.

A further dimension of recognition concerns how tourism is treated within the government's own development policies. Ideally these should be closely related to the studies and frameworks that have been prepared and negotiated with external partners. In addition to development policies, tourism should also be reflected in other relevant policies, such as those relating to trade, labour, business and the environment. This is considered in more detail under other Pillars in this document.

The level of awareness of the importance of tourism within government as a whole will partly determine the level of support the sector receives.

Issue 1

The level of recognition given to tourism in development policies

Questions to assess the issue and identify weaknesses/needs

(a) *Is tourism given sufficient coverage and recognition in studies and frameworks for development in the country?*

The most relevant studies and frameworks may vary between individual countries. However, amongst the most important ones are:

- The Regional and Country Strategy Papers (European Union) and related Regional and National Indicative Programmes
- Common Country Assessment and United Nations Development Assistance Framework (UN system)
- Poverty Reduction Strategy Papers (PRSPs)
- Millennium Development Goals Report
- Diagnostic Trade Integration Studies, Aid for Trade Matrix and trade related mid-term plans, relating to Aid for Trade Instruments such as the Enhanced Integrated Framework
- Investment Policy Review (UNCTAD).

It should be expected that tourism is given due consideration in these documents, even if this leads to a justified conclusion that it is not a priority sector. What is required is a recognition and assessment of its role and potential.

The documents should give an appropriate level of coverage of the sector, including a dedicated section where relevant¹⁷. This should indicate the status afforded to the sector, identify its role and the necessary support for its development and commit to relevant policies and actions.

(b) *Is tourism considered a priority sector by government in its own development policies?*

A number of different documents may exist that contain overall development policy, and which should give recognition to tourism. Two types are:

- National development strategies or equivalent documents. In some cases it can be the PRSP.
- Forward looking vision documents for the economy and society as a whole, which set out the desired position by a specified time in the future and what will contribute to achieving this.

¹⁷ A comparative study of various of the above frameworks found that tourism was mentioned in all the documents studied but received a full chapter in only a few of them (Yiu and Saner (2011)

(c) Is tourism recognised as a priority sector by departments of government that impact on the sector's development?

A wide range of ministries and departments can have an influence on tourism. This is summarised in Annex 3 and also considered later in terms of governance structures (Sub-pillar 1.3). The most important ministries and departments in terms of tourism's development role are those responsible for the economy, development as a whole, and the allocation of budgets. However, tourism's contribution should also be recognised by ministries that influence external relations, access, visas and security and also sectors related to tourism such as agriculture, culture and natural resources. The situation for different ministries may be seen from their own policy statements, actions taken and verbally expressed positions.

(d) How much support is given to tourism from the national budget?

A quantitative indicator of the recognition of tourism within government is its budgetary support¹⁸. This would include amounts spent on tourism ministries and agencies and on the implementation of marketing, development support and other activities. Annual variations may be indicative of changing priorities.

(e) What factors may be inhibiting the recognition afforded to tourism?

It is helpful to consider why tourism may not be given sufficient recognition as a development tool, if this is found to be the situation. Such evidence can then help to shape remedial actions. Possibilities to consider include:

- Poor measurement of the contribution of tourism to the economy and poor dissemination of the results. The issue of reliable and well presented data is covered in Pillar 2.
- Lack of awareness of the cross-sectoral dimensions of tourism and its particular strengths as a development tool, including relevance to productive capacities and trade, rural areas, women, and poor communities
- Weak communication between different sectors and ministries, including tourism delivery structures
- Perception that tourism is mostly a private sector business with Government having only limited responsibility

Possible actions to address the issue and improve the situation

- Work with international agencies and government to establish tourism's relationship to current development strategies and programmes
- Ensure tourism is fully considered in any future revision of development programmes
- Strengthen the collection and dissemination of tourism economic data (see under Pillar 2)
- Undertake awareness building activities amongst all relevant ministries and key stakeholders on the importance of tourism and its contribution to development and poverty alleviation
- Strengthen inter-ministerial structures for tourism (see 1.3 below)

Existing Services relevant to the issue that can support possible actions:

1.08 Tourism Positioning in Development Planning and Strategies

2.01 Statistical Strengthening and Development of a Tourism Satellite Account (TSA)

2.02 Statistical Strengthening

2.03 Sub-National Tourism Measurement and Analysis Assistance

2.16 Tourism Sector diagnostics, including diagnostic Trade and Integration Studies (DTIS)

¹⁸ This question is about the budget that is specifically allocated to tourism services, while recognising that many other elements of the national budget and public expenditure will be important to tourism

Coverage of tourism in Cambodia's PRSP

The Poverty Reduction Strategy Paper for Cambodia has played an important part in identifying the role of tourism as a key sector in delivering sustainable development in the country and contributing to poverty reduction. It described tourism as "key to the country's development". A separate section on Tourism Development started by presenting figures on the contribution of tourism to the economy. It then summarised the key opportunities for future tourism growth, based on careful use of the country's significant cultural and natural heritage. A number of statements were made on the future shape of tourism, emphasising the pursuit of a pro-poor tourism policy and minimising negative impacts of tourism.

A series of measures proposed to maximise benefits from tourism related particularly to the position and governance of the sector. These included: awareness raising and education of government officials on the role of tourism in economic development; the establishment of an inter-ministerial working group to ensure an integrated approach; the establishment of development zones where tourism is best place to assist poverty reduction; the use of public private partnerships to support enterprise; and a new focus on selected target domestic and international markets. Actions were identified to diversify the tourism sector, increase value added and create rural employment.

Issue 2

The extent and nature of international assistance for sustainable tourism development

Questions to assess the issue and identify weaknesses/needs

(a) Are there any major current or recent projects or initiatives in sustainable tourism that are receiving international assistance and from whom?

In considering possible future interventions, it is important that this should take account of other projects in order to build on the experience, avoid duplication and facilitate leverage of resources. While it may not be possible to cover all levels and types of assistance, any significant projects should be identified. Information should be recorded on the topic, source and level of intervention.

(b) In general, is it considered that current and recent assistance projects have been successful and can any lessons be learnt from them?

Projects receiving support from international agencies should have been subject to assessment. This may also be backed up by opinion from the main stakeholders involved.

(c) Is there sufficient coordination between international agencies in their support for sustainable tourism?

Consideration should be given to the role of coordination bodies and mechanisms, such as the UNDAF or the coordination platforms of the EIF, which may include tourism in their overall work. In some countries specific collaboration and coordination mechanisms for tourism have been established, such as regular meetings between donors.

Possible actions to address the issue and improve the situation

- Encourage more systematic assessment of the results of assistance projects in the tourism sector
- Ensure new intervention proposals refer to the results of relevant previous projects
- Strengthen coordination mechanisms and liaison between international agencies and with government with respect to sustainable tourism

Existing Services relevant to the issue that can support possible actions:

1.08 Tourism Positioning in Development Planning and Strategies

1.2 Tourism policy and regulatory framework

In order for a country's tourism sector to be successful and sustainable and to ensure that it contributes to socio-economic wellbeing and poverty reduction, it is essential to have a framework of instruments in place to guide its development. This framework should include an overarching tourism policy, a detailed tourism development strategy and master plan and relevant legislation and regulations.

A **Tourism Policy** states the government's commitment to tourism and sets out objectives for its development and management. It should be agreed and approved with the tourism sector and other stakeholders. A Tourism Policy statement or document should:

- Place tourism within the wider development policies of the country, and also take account of other policies that may affect the sector, such as industry, employment, environment, education, culture, security and immigration.
- Address the financial implications of supporting tourism, including costs and benefits and fiscal and budgetary implications for government.
- Reflect the tourism position and potential of the country within a regional and global context
- Recognise and cover the range of issues that need to be addressed by government in supporting tourism, *inter alia* including institutions, infrastructure, product development, marketing, human resources, knowledge and the socio-cultural and environmental impacts of tourism.
- Provide the basis for more detailed strategies and plans of action and for the provision of legislation and regulations.

A critical requirement of tourism policy in the context of tourism's role as a development tool is that it should fully embrace the principles of sustainable tourism³⁷. This is defined as "tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"³⁸. More specifically, pursuit of sustainable tourism involves the following agenda³⁹:

<ul style="list-style-type: none">• Economic viability• Local prosperity• Employment quality• Social equity• Visitor fulfilment• Local control	<ul style="list-style-type: none">• Community wellbeing• Cultural richness• Physical integrity• Biological diversity• Resource efficiency• Environmental purity
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Many aspects of the sustainability agenda relate to ethical issues for tourism, concerning the rights and responsibilities of all stakeholders participating in and affected by the activity of tourism. These issues and the necessary response to them are addressed in the **Global Code of Ethics for Tourism**⁴⁰ which was adopted by Resolution of the UN General Assembly in 2001. The Code affirms the right to tourism and the freedom of tourist movements and states the wish to promote an equitable, responsible and sustainable world tourism order, whose benefits will be shared by all sectors of society in the context of an open and liberalized international economy. The Code contains 10 Articles which promote mutual understanding and respect through tourism, individual and collective fulfilment, the role of tourism in sustainable development and a set of rights and responsibilities of, and towards, tourists, tourism professionals, entrepreneurs, host communities, the environment and cultural heritage. Many countries, corporate bodies and other entities have signed up to the code and it provides a sound orientation for tourism policy.

³⁷ The study of LDC tourism policies mentioned in the last section found that sustainability was the least well covered topic in these policies (Yiu and Saner, 2011)

³⁸ UNWTO and UNEP (2005) *Making Tourism More Sustainable – A Guide for Policy Makers*; Paris and Madrid

³⁹ *ibid*

⁴⁰ UNWTO, 1999

A Tourism Strategy translates the tourism policy into action, setting the direction and activities to achieve the policy objectives. It may be expressed through a **Strategic Development Plan** or **Master Plan**. This should be comprehensive, encompassing all the factors and components involved in the operation, management, measurement and control of tourism in the country.

A tourism strategy may span a period of between 5 and 15 years depending on the circumstance of the country and the maturity of the tourism sector. It is implemented by action plans which set out annual activity and allocate tasks and resources. The strategy should be evidence based and informed by a detailed programme of research, assessment and consultation. Typically the strategic plan or master plan would cover:

- Tourism resources which have the potential to be converted into viable and attractive tourism products
- Tourist facilities and services, and opportunities for investment
- Current tourism flows and performance
- Type and scale of target markets
- Transportation access and service structure
- Current and projected economic analysis
- Socio cultural, environmental and economic impacts
- Resource management - energy, water and waste
- Institutional set up for tourism development
- Tourism related legislation and regulations
- Human Resources needs
- Tourism infrastructure requirements
- Tourism development areas
- Concept designs for development of tourist areas, resorts and attractions
- Community involvement and initiatives
- Tourism marketing and information delivery

The plan may have more specific detail, such as covering additional physical planning and resort development initiatives for specific areas.

Increasingly, the value of preparing tourism strategies or master plans at a more local level has been recognised. Sometimes these are referred to as 'destination management plans'. They may cover many of the topics listed above, but for the destination in question. They can play a very important role in shaping tourism development and prioritising actions in ways that reflect the particular characteristics and needs of the local area. Such plans may be prepared, for example, for regions, provinces, cities, resorts, or rural areas (including national parks). It is important that they refer to and reflect any existing national tourism strategies or master plans.

While the existence of policies, strategies and plans is of fundamental importance for guiding tourism development, they have little value unless they are actually implemented on the ground.

Master plans and strategic development plans require continuous monitoring and adaptation to changing circumstances. Without this they are soon out of date and do not achieve the strategic objectives that were originally set. Three types of monitoring may be relevant, looking at:

- Outputs – recording steps taken and actions in train or completed, in a systematic way.
- Outcomes – checking the results of specific actions, which may relate to specific performance indicators
- Impacts – relating back to overall policy objectives and plan targets, which may be encapsulated in general indicators of levels of tourism and development.

Tourism policies, strategies and plans seek to influence the actions of government at all levels, private sector tourism enterprises, and other tourism stakeholders including visitors themselves. In part, these actions may be stimulated or controlled through instruments and regulations that are enabled through a **legislative framework**.

For the sustainable development of tourism, legislation is required which influences the tourism sector but also protects it and secures the necessary conditions for it to flourish. In many countries, tourism-specific legislation exists, such as a Tourism Act. Typically, this should cover:

- The rights, responsibilities and obligations of different stakeholders in tourism, including tourism service providers, tour operators, communities and tourists themselves.
- The establishment and responsibilities of tourism bodies, such as national tourist boards, and programmes for assisting the sector
- Mechanisms to monitor and control the sector, such as standards and licensing.

The performance and impact of the sector will also be very significantly affected by legislation and regulations which are not specific to tourism. Areas of law of particular relevance to sustainable tourism include:

- The control of development, notably through planning legislation
- The protection and conservation of natural and cultural resources
- The establishment and conducting of business enterprises, including taxation
- The employment and treatment of staff
- Visa facilitation and security.

Issue 1

The existence of a tourism policy and strategic plans, sufficient to guide the development of tourism

Questions to assess the issue and identify weaknesses/needs

(a) Is there a clearly elaborated tourism policy?

Some countries may have no discernable tourism policy or may be in the process of establishing one. A separate document called a 'Tourism Policy' may not always exist, but relevant policy statements and objectives may be found in wider documents or in the first part of a tourism strategy or master plan. The content is more important than the format, provided that policies are clear, binding, influential and cover the required spectrum of tourism.

(b) Does the policy commit to the elements of sustainable tourism?

Concern about the environmental and social impacts of tourism as well as its economic development, including its contribution to poverty reduction, should be clearly stated and reflected throughout the policy. Sustainability issues should be mainstreamed and not addressed as an add-on policy or through a separate strategy or plan.

(c) Is the country a signatory of the Global Code of Ethics for Tourism and does the policy reflect this?

Direct recognition and reference to the Code in the country's tourism policy would be evidence of an awareness of the ethical issues affecting the tourism sector and a commitment to addressing them. Without a direct reference, it is important to consider whether the policy approach is in line with the principles of the Code.

(d) Is consideration given to the financial and fiscal implications of a policy to support tourism?

The development and presentation of the policy on tourism should demonstrate that consideration has been given to the fiscal consequences of the policy in terms of the anticipated costs and revenues associated with the development of the sector in the short, medium and long term.

(e) Is there a well-researched and comprehensive national tourism strategy and/or master plan for tourism?

Some countries may have a tourism policy but no development strategy or action plans. In others, these may exist but may not have been based on a thorough, objective and professionally informed assessment of the tourism situation and potential of the country. The strategy/plan should be comprehensive. Fundamentally, it should include a product and market assessment and proposals for all aspects of tourism development, management and marketing. A list of typical contents has been given earlier.

(f) Did preparation of the tourism policy and strategy/master plan involve consultation and engagement with stakeholders?

This is very important for the credibility and implementation of the policy and plan. The extent and type of consultation should be documented in the plan itself and be confirmed by the main stakeholders, such as private sector bodies, local authorities, NGOs and community representatives.

(g) Is the tourism strategy/master plan up to date and is a revision planned?

Quite often a tourism strategy or plan may still be in existence but become out of date. Where an existing plan is nearing the end of its life, a clear proposal should be in place for its renewal.

h) Are actions and responsibilities clearly set out and costed in the plan?

It is important to check if a clear action plan exists, which defines: the action to be taken; by whom; timelines; budget; and success criteria. While the need to consider the overall financial implications of a tourism policy has been raised above under (c), it is also important to ensure that individual actions are costed and funded.

(i) Do tourism strategies/plans take account of the regional context and opportunities?

There may be considerable potential for cooperation with other countries within the region and with institutions, programmes and initiatives operating at a regional level. This can relate to various topics, such as access, visas, joint projects, common standards, cross-border areas and marketing. It is also very important that tourism policies take account of any regional development policies, funding and support programmes.

(j) Have tourism strategies/plans been prepared for specific destinations and are more needed?

While national master plans should make reference to the spatial dimension, considering the differing needs of individual areas within a country, separate strategies or destination management plans should be prepared at a local level where appropriate. This is as well a sound reflection of governance structure, where many countries are giving the mandate of tourism to regional/local authorities. These may be particularly relevant in the most visited areas or those with the greatest need and potential. However, they can be valuable in all types of area to guide their tourism development and activity.

Possible actions to address the issue and improve the situation

- Establish, review or renew the country's tourism policy in consultation with industry stakeholders
- Draw up or renew a tourism strategy for the country, expressed in a strategic development plan or master plan for tourism
- Ensure that any missing components of existing plans are included in future revisions and covered by necessary actions in the interim
- Establish master plans for regions or areas of the country as may be required
- Develop tourism zone and resort development plans
- Provide guidelines, templates and pilot examples for future area plans
- Ensure the strategy or master plan includes an action plan, with clearly defined actions to be taken, responsibilities, timelines, budget and success criteria

Existing Services relevant to the issue that can support possible actions:

- 1.01 Tourism Development Master Plans and Strategic Development Plans
- 1.02 Country Tourism Policy
- 1.05 Tourism Physical Planning and Resort Development
- 1.13 Destination Management Planning
- 5.06 Developing Policy Frameworks Integrating Culture into Development through Tourism

National Strategy for Sustainable Development of Tourism, Burundi

The Government of Burundi has identified tourism as a priority sector for development. With the support of UNDP it decided to seek UNWTO's technical assistance in the formulation of a long term (10 year) National Strategy for the Sustainable Development of Tourism. The Strategy was approved in April 2011 and formally launched in September that year. The main recommendations related to: the need for a strengthened institutional and regulatory framework; the creation of a consolidated and diversified tourism offer; the strategic positioning of Burundi within East Africa's tourism; quality tourism services and enhanced tourism management; and creating an enabling environment for tourism investment in the country.

The project also implemented the formulation of a new Tourism Law for Burundi, created a national platform for the harmonisation of tourism statistics and formulated pilot demonstration projects that included a coastal management plan for Lake Tanganyika. In order to guide implementation, a detailed Action Plan identified priority actions for the first three years, possible sources of funding, lead implementation agencies and a coordination, monitoring and evaluation framework for the implementation process.

Issue 2

The implementation and monitoring of the policy/strategy/plan

Questions to assess the issue and identify weaknesses/needs

(a) Is the tourism policy/strategy/plan being effectively implemented?

An indication of whether the tourism plan is being influential can be obtained from the extent to which it is referred to as a guidance document. More specific evidence may be obtained about progress on individual actions contained in the plan. All, some or none of them may have been implemented. Evidence may come from reports of actions undertaken or from a more formal monitoring process such as that referred to below.

(b) Are all relevant stakeholders fully involved in its implementation?

Action plans should specify the stakeholders required to take the lead or support each individual action. The extent to which this is happening should be assessed. An example may be the integration of the actions in the programmes of other departments relating to sustainable development and poverty reduction (see later under sub-pillar 1.3)

(c) What may be holding back implementation?

Implementation could be impaired by a number of factors, which should be investigated. These may include:

- Weak ownership of the strategy and lack of commitment to it
- Poor communication of the strategy and action plan
- Lack of public funding for infrastructure and other investment
- Lack of private sector investment, including local and FDI, perhaps related to the availability of capital or to reluctance to take risk
- Insufficient capacity and technical ability
- Over ambition or other inadequacies of the plan.

(d) Are progress and results being monitored and reviewed?

There should be effective monitoring and evaluation with a feed-back mechanism to ensure continuous review and improvement of the plan. There should be clear evidence of the monitoring of outputs. Actions taken may be officially recorded and communicated by those responsible for the plan. As far as outcomes and impacts are concerned, it is important to check whether the plan identified appropriate indicators to use and whether any measurement and monitoring has taken place.

Possible actions to address the issue and improve the situation

- Ensure all identified actions are linked to a responsible body for implementation
- Establish a Steering Group to take responsibility for ensuring that a plan is implemented and for tracking progress
- Research and address factors which may be holding back implementation, including provision of sufficient resources
- Identify indicators and set up monitoring systems

Existing Services relevant to the issue that can support possible actions:

1.01 Tourism Development Master Plans and Strategic Development

1.09 Capacity Building Programmes in Tourism Development and Management

5.01 Capacity Building Programmes on Application of Indicators for Sustainable Tourism

5.02 Observatories of Sustainable Tourism - a systematic application of sustainable tourism indicators

Implementation of Tourism Development Master Plan for Punjab

In 2008 the UNWTO formulated a Tourism Development Master Plan for the State of Punjab for the period 2008-23, recognising its potential to become a competitive destination based on its rich cultural, religious and natural heritage. After the successful completion of the plan, it was felt that further technical assistance was required to develop capacities for overseeing and managing sustainable tourism development and to implement the Master Plan's recommendations in a time-bound manner in accordance with an Action Plan.

Two implementation phases were supported. The first included: setting up a Research and Statistics Unit; securing funding for the demonstration projects identified in the plan; developing marketing material and communication programmes; and establishing guide training. A second phase has focused on rural tourism development; tourism awareness-raising amongst young people; and further advanced technical assistance building on the phase one actions.

Issue 3**The adequacy of legislation and regulations affecting tourism*****Questions to assess the issue and identify weaknesses/needs******(a) Is there specific tourism legislation (e.g. Tourism Act) that is fit for purpose?***

A Tourism Act should exist as a current legal document. The contents of the Act should convey rights and responsibilities as described in the introduction to this pillar. It is possible that the legislation may be quite old and it is important to assess whether it is still relevant in the current situation or whether it may need to be reviewed.

(b) Is the tourism legislation fully implemented?

In some developing countries relevant tourism legislation may exist but not be fully or adequately implemented. This may be because of insufficient resources or technical knowledge, which may be addressed through the provision of well directed support, including capacity building. A further problem may be lack of communication between implicated ministries (see sub-pillar 1.2) who should all be aware of the tourism law and endorse it.

(c) Does tourism legislation adequately address local level roles and responsibilities?

It is important that tourism governance structures and processes at a local level are afforded sufficient legal powers to influence tourism planning and management. Legislation can help to clarify and underpin their roles and responsibilities. This may relate to different levels of governance from states, regions and provinces down to the community level.

(d) Does other current legislation meet the needs of sustainable tourism and is it enforced in the sector?

The relationship between specific tourism laws and other legislation affecting the sector should be clear, with the former clearly endorsing the latter and not superseding it. A general view should be formed of whether the country's legislative framework is sufficient in its coverage, application and level of enforcement within the tourism sector to ensure its sustainability. This may not be easy to answer. There may have been previous studies of relevant legislation affecting tourism and its enforcement. If not, this could be a desirable action.

(e) Is sustainable tourism development assisted or held back by regulations and how they are applied?

Legislation, both tourism specific and more general, will form the basis for the application of regulations applied to the tourism sector and the way it operates. These regulations should deliver the right balance between controlling tourism development and operations and ensuring that the overall growth of the sector is not impaired. A particular issue may be the way that regulations are applied and enforced in practice and whether this is efficient, fair and effective. This can best be judged by obtaining the views of both government and the private sector.

Possible actions to address the issue and improve the situation

- Review and where necessary establish a process of preparing or renewing tourism-specific law in the country
- Support specific actions to implement the tourism law
- Review the impact on tourism of the range of existing legislation and provide guidance on its interpretation and application within the sector
- Review the range of regulations affecting the sector and the way they are applied.

Existing Services relevant to the issue that can support possible actions:**1.03 Tourism Legislation and Regulation**

1.3 Tourism governance and institutional setup

Tourism is a complex sector requiring many players to be involved in delivering the wide range of facilities and services that combine to provide the overall visitor experience. A table illustrating a wide range of stakeholders was provided in the Guidance Note (Section 1, Table 1). There is a fundamental need for leadership in tourism but also for collaboration and partnership in the way it is developed and delivered.

Good governance requires transparency and honesty, technical capacity and dedication, effectiveness and efficiency, democratic participation and a focus on ensuring the sustainability of resources. It also requires engagement of a wide range of stakeholders and effective communication of issues and actions to build awareness, interest and support.

Governments have a vital role to play in providing leadership and coordination. They are responsible for the provision of much of the infrastructure and resources on which the sector depends and for the necessary regulatory and support functions that are critical for its sustainable development. Tourism needs to have a clear position within government, with a minister and a civil service dedicated to its development.

Many ministries within government have a strong bearing on the sustainability of tourism, as mentioned under sub-pillar 1.1 and illustrated in Annex 3. These include high level ministries responsible for foreign affairs, security and the direction of development and fiscal policy, ministries responsible for the planning and management of key resources, such as environment and transport, and those covering related sectors and functions such as culture and agriculture. Coordination and cooperation between them is vital and should be facilitated through appropriate structures and processes.

Tourism governance should not just be in the domain of government. Of equal importance is the position of the private sector. Tourism is primarily an economic activity with individual businesses responsible for most of the facilities and services, such as accommodation, tours and transport. The private sector should be centrally engaged in the planning, development and management of tourism.

Increasingly, public-private collaboration or more formal partnerships (PPPs)⁴¹ are found in tourism governance structures and also in the delivery of various tourism functions and services. PPPs can help in generating funds for tourism development, pooling knowledge and experience, and ensuring that projects are implemented quickly and transparently.

A number of other types of stakeholder in tourism can also contribute effectively to its development and management and play a valuable part in governance structures. These include NGOs, research and educational institutions and other civil society bodies.

NGOs have a highly important role to play in tourism and especially in working to make it more sustainable. In particular, these include NGOs working in the related areas of sustainable livelihoods, community empowerment, gender issues, environmental conservation and cultural heritage. These may be international, national or local NGOs and they can engage in tourism both at a national and at a local level in developing countries. The important functions that they are well placed to deliver include: representing specific interests; providing technical knowledge and expertise; capacity building; and facilitating and coordinating activity between stakeholders.

⁴¹ The European Commission defines public-private partnerships as 'legal forms of cooperation between public authorities and the world of business which aim to ensure the funding, construction, renovation, management or maintenance of an infrastructure or the provision of a service' Commission of the European Community (2004), *Green Paper on Public-Private Partnerships and Community Law on Public Contracts and Concessions*, Brussels

Research, education and training bodies, including universities, training institutes and individual experts, can make a significant contribution to sustainable tourism development. Their activities can be broadly educational, strengthening awareness and understanding of the tourism sector, including issues relating to its impact and sustainability, or more specifically focused, delivering training and capacity building to improve knowledge and skills in specific technical subjects.

Many developing countries have been going through a process of decentralisation of their overall governance. It is very important that effective governance structures for tourism are in place locally. It is at the local destination level that many services vital to tourism are delivered and where the positive and negative socio-economic and environmental impacts of tourism are most apparent, requiring sound local planning and management. In many countries there is an increasing tendency for local tourism governance to be based on public-private or multi-stakeholder collaboration and partnerships, sometimes in the form of Destination Management Organisations (DMOs). The importance of involving local communities in the planning and development of tourism in their areas is also widely recognised.

At all levels of governance it is important that those responsible for tourism development and management have sufficient knowledge and skills to perform their tasks, including in the development and implementation of strategies and actions to improve the sustainability of tourism and its contribution to sustainable development. This should include an understanding of the concept of sustainable tourism, including its different aims, available instruments to make the tourism sector more sustainable, and the roles and responsibilities of government, the private sector and civil society. Awareness and knowledge should include the economic, social, and environmental impacts of tourism and the opportunities to use tourism positively to support poverty reduction and the conservation of natural and cultural heritage.

Issue 1

The effectiveness of a central leadership structure for tourism

Questions to assess the issue and identify weaknesses/needs

(a) Is there a dedicated tourism ministry, department or unit within government?

In some countries tourism may be afforded a separate ministry. In others it may form part of a joint ministry, commonly linking with culture, natural resources, or economic development. In the latter situation, it is important that there is a separate, identifiable and dedicated political and administrative structure responsible for tourism. An indicator of the level of political status afforded to tourism could be whether there is a separate Secretary of State or Minister for Tourism and at what level of seniority.

(b) Is there a separate governmental delivery agency for tourism with an inclusive structure and clear role that supports sustainable tourism?

While in some countries all tourism governance and delivery functions may be vested in the ministry, it is more common and usually more effective for key functions to be undertaken by one or more separate agencies which may be set up by legislation. They may include a National Tourist Authority, with widespread functions, or a National Tourism Organisation (NTO) which may focus on marketing and promotion. All such bodies should support sustainable tourism through their activities. Their governance structures should include the private sector and other interests. Their roles should be clearly defined and distinguished from those of tourism ministries to avoid overlap.

(c) Do these tourism governance bodies operate effectively and what are their main needs?

Tourism Ministries and agencies vary in their effectiveness. Where effectiveness is less strong this may be caused by identifiable limitations and needs. These may include, amongst others:

- Limited human and financial resources

- Lack of experience, knowledge and skills in general or about specific subjects
- Weak political or wider stakeholder support.

(d) Are skills needs within tourism governance bodies effectively assessed and addressed, including in sustainability issues?

Knowledge and skills should be assessed by regular audits. Needs may be addressed by provision of training and capacity building. Understanding of sustainability issues may come partly from experience but also from participating in relevant training courses.

(e) Does the country engage actively with global and regional bodies and other countries on tourism development and management?

Governance at a national level can be strengthened by participation in structures that exist globally or regionally to support tourism, through the exchange of knowledge and skills and engagement in joint activities. Individual countries should work with their neighbours, as appropriate, on tourism policies, planning, strategies and actions to their mutual benefit. This may cover a wide range of issues such as joint promotion, conservation of trans-boundary assets, transport and accessibility, including visa arrangements.

Possible actions to address the issue and improve the situation

- Review the mandate, roles and function of the Ministry responsible for tourism and National Tourism Organisation
- Review the level, use and sufficiency of resources allocated to Tourism Ministry and NTO
- Strengthen the profile of the Tourism Ministry and NTO and level of reporting by them
- Provide capacity building and skills training for tourism officials and key stakeholders involved in governance, including in sustainability issues
- Strengthen global and regional links

Existing Services relevant to the issue that can support possible actions:

1.04 Institutional Strengthening and Public Private Partnerships

1.10 Capacity Building Practicum of Tourism Officials

1.11 Executive Training Programme

1.12 Capacity Development of Tourism Related Institutions - Government and Government Agencies

Issue 2

The engagement of stakeholder interests in national tourism governance

Questions to assess the issue and identify weaknesses/needs

(a) Is there a structure or process for engagement of other ministries in tourism governance?

Structures for inter-ministerial liaison and engagement within government vary between countries. Some countries have established structures, such as pan-government tourism committees, that bring the main ministries together specifically to discuss tourism. In others this relies on tourism being raised at general meetings between permanent secretaries or within cabinet, which may happen regularly or quite infrequently. In others again, inter-ministerial liaison may simply be ad hoc and informal.

(b) Is there a structure or process for involvement of a range of tourism stakeholders in tourism governance?

This can help in building trust between different interests, in ensuring that government policy and actions reflect industry needs and reality, and in coordinating the development and implementation of plans and strategies.

A number of countries have established National Councils or Forums for tourism that bring together a range of types of stakeholder, including different ministries (as above), private sector representatives (see further under Issue 3 below), and a range of civil society bodies. Smaller multi-stakeholder committees and working groups can be established for particular purposes.

(c) Are NGOs, educational and other civil society bodies engaged in national tourism governance structures?

Such bodies may be involved directly in multi-stakeholder governance structures or forums, or they may be regularly engaged and consulted in the governance process.

(d) Does the multi-stakeholder structure/body function effectively and does it need strengthening?

The body should meet regularly, be well attended, provide a strong platform for discussion and coordination and be able to deliver a programme of action related to the tourism strategy. Weaknesses in any of these aspects should be investigated. Capacity issues may relate partly to the availability of sufficient human and financial resources to manage the operation of the body. The body as a whole should have sufficient knowledge and skills, including in matters relating to the sustainability of tourism.

(e) Is action taken to promote stakeholder buy-in and wider public interest?

It is important to stimulate stakeholder interest and ensure that participation in governance structures is maintained over time. Equally, there is a need to generate wider public awareness, support and interest in tourism, the issues involved and the actions being taken. This is largely about good communication, including effective engagement with relevant media.

Possible actions to address the issue and improve the situation

- Establish an inter-ministerial commission to discuss and take decisions on activities that influence tourism development and its sustainability.
- Review levels of communication and cooperation between tourism stakeholder bodies
- Establish and maintain a stakeholder council or forum for tourism
- Expand the level of engagement of NGOs and other civil society interests
- Strengthen the capacity for any existing or new multi-stakeholder structure
- Raise awareness and knowledge of tourism amongst a range of stakeholders and institutions that can influence its competitiveness and sustainability
- Strengthen media engagement and communication of tourism issues and actions taken

Existing Services relevant to the issue that can support possible actions:

1.04 Institutional Strengthening and Public Private Partnerships

1.09 Capacity Building Programmes in Tourism Development and Management

1.12 Capacity Development of Tourism Related Institutions - Government and Government Agencies

5.17 Strengthening of Sustainable Tourism Governance

National partnership Structures in Tourism Governance

In **Tanzania**, liaison used to occur between the private sector confederation and the ministry on an informal basis. However, owing to a problem of lack of continuity and changing personnel, it was decided to formalise this. A MoU was been signed between the two bodies and a Public-Private Partnership Forum was established in 2010. This meets two times per year. The Forum is made up of senior people who are able to take decisions, and comprises the Ministry, Tourist Board, and representatives of the national parks, national tourism college and ten private sector associations. Other Ministries, including the Environment, can be called on as appropriate. Rather than simply providing a sounding board for complaints, as in the past, the Forum considers policies and their implementation and ensures that actions agreed are followed through.

In **Cameroon**, the National Council for Tourism has 23 members including representatives of some 13 ministries, the private sector and civil society. Under the presidency of the Prime Minister, it acts as an inter-ministerial coordinating body and includes the participation of the private sector. This body meets twice a year (with more frequent meetings by specialised technical committees) and discusses all pressing tourism issues allowing the Prime Minister's Office to easily coordinate various government agencies, as required.

Issue 3

The involvement of the private sector and use of public-private partnerships

Questions to assess the issue and identify weaknesses/needs

(a) Are there clear structures that bring together and represent private sector enterprises?

The existence of membership bodies and other networks is very important in enabling individual tourism businesses to influence tourism governance and to benefit from resulting decisions and actions. Many developing countries have trade associations for hotels, restaurants, tour operators, guides and other service providers, sometimes coordinated in a single tourism federation or linked to wider trade bodies such as Chambers of Commerce.

(b) Do existing private sector structures have adequate capacity to be effective?

Often private sector associations are under-resourced. Initiatives to help them develop their membership, activities and communications can be a good way to strengthen outreach within the tourism sector.

(c) How fully is the private sector engaged in tourism governance?

Considerable variation may be found in the level and nature of involvement of the private sector in tourism governance. Studies of stakeholder collaboration have identified degrees of engagement between the government and the private sector from simple information giving to detailed consultation, collective decision taking and running joint programmes⁴². This may be affected by the degree of engagement with different structures, such as representation on the National Tourism Organisation.

(d) In general, how engaged and committed is the private sector to pursuing sustainable tourism policies?

While this question is covered more specifically in other Pillars with respect to different aspects of sustainable tourism, it is helpful to form an overall view of the level of engagement and commitment of the private sector to tourism sustainability, in the context of tourism policy and governance.

⁴²UNWTO and SNV (2010a) *Joining Forces - Collaborative Processes for Sustainable and Competitive Tourism*

(e) To what extent are public-private partnerships used in tourism development and management?

Public-private partnerships can be used in tourism governance at a macro and micro level and in the delivery of a wide range of different tourism services. Examples include: establishing and delivering marketing campaigns; providing information services; developing infrastructure; operating business concessions; providing training and undertaking research.

(f) Are conditions right for establishing PPPs and their successful functioning?

PPPs are characterised by a business-like relationship, common decision-making procedures, risk sharing and long term contractual relations. PPPs can be difficult to establish and fail for a number of reasons, including mistrust, lack of resources and inexperience. In developing countries PPPs are often absent because of poor knowledge about setting them up and about the benefits they may bring.

(g) Have other forms of business model and structure been encouraged in tourism?

While PPP implies joint engagement by the public and private sectors, there are other ways in which private sector activity and tourism operators can be set up to involve more stakeholders and deliver a wider agenda. These may range from CSR programmes of individual businesses, to the establishment of cooperatives and social enterprises. This relates equally to Pillar 2, covering investment, and Pillar 4 on poverty reduction.

Possible actions to address the issue and improve the situation

- Strengthen and support private sector associations and networks
- Strengthen the level of engagement of the private sector in governance structures and processes
- Review the effectiveness and identify the challenges facing existing PPPs
- Identify best opportunities for PPP initiatives in tourism and provide recommendations and assistance in setting them up
- Consider alternative structures for private sector engagement and partnerships
- Build the capacity of stakeholders

Existing Services relevant to the issue that can support possible actions:

1.04 Institutional Strengthening and Public Private Partnerships

Issue 4

The effectiveness of tourism governance at a local level

Questions to assess the issue and identify weaknesses/needs

(a) Is there an effective process for involving local government structures in tourism?

This is increasingly recognised as a key issue in developing countries. Effectiveness will depend partly on:

- Commitment to decentralisation and support for this by national bodies
- Clarity, understanding and agreement on the responsibilities for tourism planning and management of regional bodies and local authorities
- Involvement of all relevant departments at a local level (e.g. planning, environment, etc.)
- The capacity of local government to perform the necessary functions.

(b) Is there effective coordination between national, regional and local tourism governance?

This may be achieved by the presence of a coordination body that enables two-way communication between national and local levels and between local destinations. Opportunities to exchange experiences and engage in mutual learning and development should be encouraged. Sometimes destinations can achieve more by working together as groups.

(c) Are there structures in place at a destination level that involve the private sector and other stakeholders in tourism governance and delivery?

This may be a critical factor in successful tourism governance, influencing the performance and sustainability of tourism on the ground. DMOs and similar structures can be quite rare in developing countries.

(d) Are local communities involved in tourism governance in their areas?

Community involvement in planning and delivery should be seen as a requirement of sustainable tourism as a matter of principle. This may occur both at the village level and through community representation at higher levels of governance. The concept of 'the community' and the identification of people who can truly represent its interests can be hard to define and varies between countries. In some places, traditional structures, including elders and chiefs, can play a significant role. In others, village councils may be well placed to do so.

(e) Are NGOs and other civil society bodies involved in local tourism governance structures?

These may include bodies representing, for example, conservation, culture and gender interests. Local education and training bodies should also be involved.

(f) Are local level structures working effectively and what would help them improve their performance?

It is instructive to consider generally where the main weaknesses may lie. Capacity and resources, both financial and human are often even more limited at a local level than nationally.

(g) Do those responsible locally for tourism governance have sufficient experience and skill, including in aspects of tourism sustainability?

This is likely to vary considerably at a local level. A skills audit can help to clarify needs. Relevant skills are more likely to have come from experience but could be strengthened by training.

Possible actions to address the issue and improve the situation

- Strengthen awareness of tourism development and management issues at a local level
- Improve coordination between national and local level tourism governance and action
- Encourage local level tourism planning where appropriate
- Assist the development and operation of multi-stakeholder governance structures for tourism within local destinations, including the involvement of the private sector and local NGOs
- Work with local communities to strengthen their understanding of tourism and increase their engagement in governance
- Provide capacity building for tourism stakeholder bodies at a local level, including through visits and exchanges with other areas
- Improve local awareness and knowledge of sustainability issues in tourism through communication and training

Existing Services relevant to the issue that can support possible actions:

- 1.04 Institutional Strengthening and Public Private Partnerships
- 1.09 Capacity Building Programmes in Tourism Development and Management
- 1.12 Capacity Development of Tourism Related Institutions - Government and Government Agencies
- 1.13 Destination Management Planning
- 2.06 Marketing and Promotion Plan
- 5.17 Strengthening of Sustainable Tourism Governance

Tourism governance structures at a local level

The **West Coast Region of Ghana** has an attractive coastline of 172 kilometres as well as an interesting cultural heritage. A Destination Management Organisation was established for the region as a public-private alliance and legalised in 2010. It involves a network of the main private enterprises (notably beach resorts), the Regional Economic Planning Office, the regional office of the Ghana Tourist Board, conservation interests, local government (District Assemblies) and NGOs. The initiative was supported by SNV and the Italian Government, together with UNWTO. The DMO supports and coordinates a marketing programme and a variety of training and product development initiatives. The presence of the DMO has encouraged investment in five new hotels. In order to strengthen governance and engagement at a more local level in the region, Town Tourism Development Committees have been established in the main communities receiving tourists, with personnel that have been trained through support from UNWTO.

The **State of Kerala**, India has embraced the concept of Responsible Tourism in its policies and actions to support the sector. A key aspect of their strategy has been to proactively engage local communities. This has been achieved through the development of a range of visitor experiences at a village level, including village tours and engagement in various cultural heritage activities, as well as strengthening supply chains between local farmers and tourism business. An effective local governance structure has been fundamental to the success of the approach. It was found that a four-part stakeholder structure was required at a community level, bringing together:

- The Grama Panchayat, the Village Self-Government, which is the lowest level of administration in India.
- The Department of Tourism for Kerala
- Representatives of the local tourism sector, such as hotel businesses
- Facilitators and animators of local community groups such as produce suppliers, craft makers and guides.

The experience gained in Kerala is now influencing other States and has been reflected in the national tourism policy for India.

QUESTIONNAIRE– PILLAR 1 TOURISM POLICY AND GOVERNANCE

To facilitate a quick assimilation of the situation, the columns after the questions provide the opportunity to allocate a score, if applicable. This is based on the following scale:

1	Area of particular need/opportunity – highest priority for action/intervention	 Priority for action
2	Improvement required – should also be considered for intervention/support	
3	May benefit from some improvement – but less current need for intervention	
4	Appears to be satisfactory – maintain	
5	Area of apparent strength – may provide an example to others	
X	No information available to answer the question /This could not be assessed	

1.1 The position of tourism in development policies and programmes

Issue 1: The level of recognition given to tourism in development policies

	QUESTION	COMMENT	Priority for action						
			High	Low	1	2	3	4	5
a	Is tourism given sufficient coverage and recognition in studies and frameworks for development in the country?								
b	Is tourism considered a priority sector by government in its own development policies?								
c	Is tourism recognised as a priority sector by departments of government that impact on the sector's development?								
d	How much support is given to tourism from the national budget?								
e	What factors may be inhibiting the recognition afforded to tourism?								
Issue 2: The extent and nature of international assistance for sustainable tourism development									
a	Are there any major current or recent projects or initiatives in sustainable tourism that are receiving international assistance and from whom?								
b	In general, is it considered that current and recent assistance projects have been successful and can any lessons be learnt from them?								
c	Is there sufficient coordination between international agencies in their support for sustainable tourism?								

1.2 Tourism policy and regulatory framework

Issue 1: The existence of a tourism policy and strategic plans, sufficient to guide the development of tourism

a	Is there a clearly elaborated tourism policy?							
b	Does the policy commit to the elements of sustainable tourism?							
c	Is the country a signatory of the Global Code of Ethics for Tourism and does the policy reflect this?							
d	Is consideration given to the financial and fiscal implications of a policy to support tourism?							
e	Is there a well-researched and comprehensive national tourism strategy and/or master plan for tourism?							
f	Did preparation of the tourism policy and strategy/master plan involve consultation and engagement with stakeholders?							
g	Is the tourism strategy/master plan up to date and is a revision planned?							
h	Are actions and responsibilities clearly set out and costed in the plan?							

	QUESTION	COMMENT	Priority for action				
			High	Low			
j	Have tourism strategies/plans been prepared for specific destinations and are more needed?		1	2	3	4	5 X
Issue 2: The implementation and monitoring of the policy/strategy/plan							
a	Is the tourism policy/strategy/plan being effectively implemented?						
b	Are all relevant stakeholders fully involved in its implementation?						
c	What may be holding back implementation?						
d	Are progress and results being monitored and reviewed?						
Issue 3: The adequacy of legislation and regulations affecting tourism							
a	Is there specific tourism legislation (e.g. Tourism Act) that is fit for purpose?						
b	Is the tourism legislation fully implemented?						
c	Does tourism legislation adequately reflect local level roles and responsibilities?						
d	Does other current legislation meet the needs of sustainable tourism and is it enforced in the sector?						
e	Is sustainable tourism development assisted or held back by regulations and how they are applied?						
1.3 Tourism governance and institutional setup							
Issue 1: The effectiveness of a central leadership structure for tourism							
a	Is there a dedicated tourism ministry, department or unit within government?						
b	Is there a separate governmental delivery agency for tourism with an inclusive structure and clear role that supports sustainable tourism?						
c	Do these tourism governance bodies operate effectively and what are their main needs?						
d	Are skills needs within tourism governance bodies effectively assessed and addressed, including in sustainability issues?						
e	Does the country engage actively with global and regional bodies and other countries on tourism development and management?						
Issue 2: The engagement of stakeholder interests in national tourism governance							
a	Is there a structure or process for engagement of other ministries in tourism governance?						
b	Is there a structure or process for involvement of a range of tourism stakeholders in tourism governance?						
c	Are NGOs, educational and other civil society bodies engaged in national tourism governance structures?						
d	Does the multi-stakeholder structure/body have sufficient capacity to function effectively and does it need strengthening?						
e	Is action taken to promote stakeholder buy-in and wider public interest?						
Issue 3: The involvement of the private sector and use of public-private partnerships							
a	Are there clear and active structures that bring together and represent private sector enterprises?						
b	Do existing private sector structures have adequate capacity to be effective?						
c	How fully is the private sector engaged in tourism governance?						
d	In general, how engaged and committed is the private sector to pursuing sustainable tourism policies?						

	QUESTION	COMMENT	Priority for action					
			High	Low	→			
			1	2	3	4	5	X
g	Have other forms of business model and structure been encouraged in tourism?							
e	To what extent are public-private partnerships used in tourism development and management?							
Issue 4: The effectiveness of tourism governance at a local level								
a	Is there an effective process for involving local government structures in tourism?							
b	Is there effective coordination between national, regional and local tourism governance?							
c	Are there structures in place at a destination level that involve the private sector and other stakeholders in tourism governance and delivery?							
d	Are local communities involved in tourism governance in their areas?							
e	Are NGOs and other civil society bodies involved in local tourism governance structures?							
f	Are local level structures working effectively and what would help them improve their performance?							
g	Do those responsible locally for tourism governance have sufficient experience and skill, including in aspects of tourism sustainability?							

PILLAR 2 Economic Performance, Investment and Competitiveness

Tourism is a major contributor to world trade, accounting for 5% of direct global GDP and over 30% of the world's exports of services (52% for LDCs). For many developing countries it is one of the main sources of foreign exchange income. It is the only major service sector in which developing countries have consistently recorded trade surpluses relative to the rest of the world. In nearly half of the world's LDCs tourism ranks among the top three export sectors. However, for those countries that are dependent on this level of trade to be able to maintain and build on their position and for other countries to be able to expand tourism in their economies, the conditions must be right for on-going investment and business growth, while ensuring that this meets the principles of sustainable tourism articulated elsewhere in this document.

If tourism is going to play its full part in economic growth it must be given proper recognition and support in the design of trade, investment and business development policies. This means that data on tourism and its contribution to the economy must be robust and convincing. This is also necessary for guiding the growth of the sector, keeping abreast of performance and adapting policy where required.

For tourism to succeed as a development tool the sector must be competitive. Above all, the products and experiences that a country offers must be relevant to international markets, while also recognising the growing opportunities in regional and domestic markets. The countries and their products must be presented and promoted effectively, through well targeted marketing plans implemented in tandem by governments and the private sector.

The World Economic Forum compares the competitiveness of destination countries in travel and tourism using a set of 79 variables⁴³. These span a wide spectrum of factors from the policy and regulatory environment to the accessibility and safety of the country, its infrastructure and its natural and cultural resources. The resulting index provides a valuable insight for developing countries in considering, monitoring and comparing their tourism competitiveness against each other and against developed economies. Different variables in the index, although not covered comprehensively or in detail in this document, relate variously to each of the five pillars. In this section, on Pillar 2, particular attention is paid to matters relating to the business environment.

Four sub-pillars are identified for assessment:

- **Measuring tourism and its contribution to the economy**

The availability of tourism data and the need for improvement in how it is collected, together with the use of established processes for understanding the economic value of the sector through supply and demand side measures and the use of national accounts.

- **Trade, investment and the business environment**

The context for stimulating trade and investment through the inclusion of tourism in international negotiations and agreements. Factors for assessment also include levels of investment, an understanding of barriers to growth and the provision of a business environment conducive to the needs of the tourism sector.

- **Brand, marketing and product positioning**

The clarity of a country's destination brand and the coherence and execution of its marketing plan, backed up by a set of products that are able to deliver the quality and diversity needed by identified target markets.

⁴³ World Economic Forum (2013) *The Travel and Tourism Competitiveness Report, 2013*

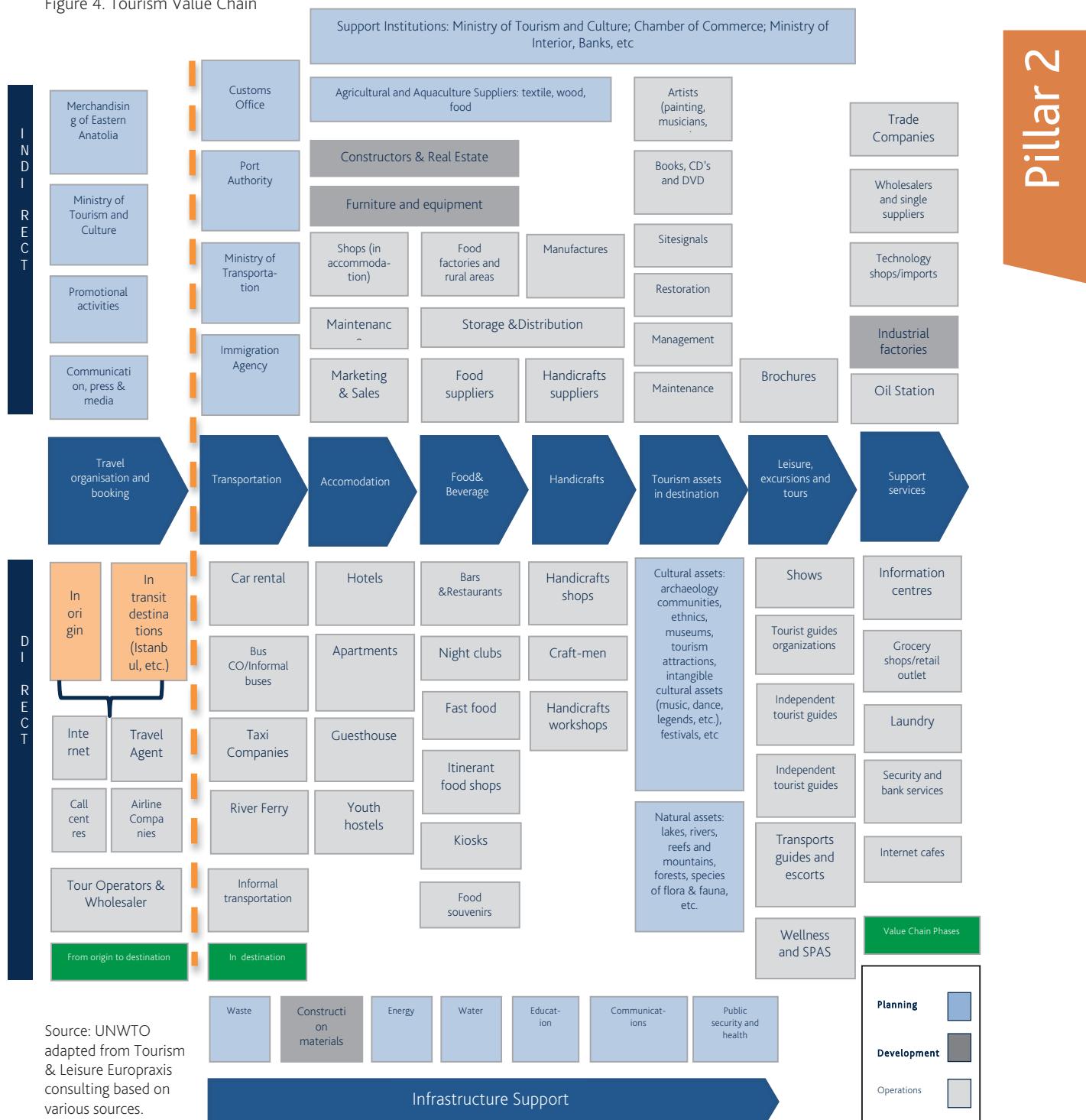
- **Resilience and risk management**

The attention paid to avoiding and managing shocks to the tourism sector from internal and external sources, so strengthening its reliability as a source of income and prosperity.

Much of the content of this pillar reflects the complexity of tourism as an economic sector. This is illustrated by a diagrammatic presentation of the tourism value chain, shown below.

Tourism value chain

Figure 4. Tourism Value Chain



Pillar 2

2.1 Measuring tourism and its contribution to the economy

The importance of improving the reliability, accessibility and transparency of statistics as a vital tool to guide economic development is increasingly recognised in international forums and individual countries. An action plan for fully integrating statistics in decision making, promoting open access to statistics and increasing resources for statistical systems was agreed by the Fourth High Level Forum on Aid Effectiveness in 2011⁴⁴. Amongst priorities identified were the need to ensure that the development of sectoral data is fully integrated into and synchronized with national and regional statistical strategies and to develop programs to increase the knowledge and skills needed to use statistics effectively for planning, analysis, monitoring, and evaluation. The provision and measurement of good quality tourism data requires an active involvement and coordination between key players, including the Ministry of Tourism, National Statistics Office and other bodies that can provide data or engage in its collection such as the Central Bank, customs authorities and tourism business associations.

Robust tourism data is a fundamental requirement for all aspects of tourism planning. In order to have a measure of a country's competitive position it is essential to be able to track, for example, the growth or decline in visitor arrivals, their expenditures, the main purposes that visitors have for visiting the country, the number of establishments catering for visitors, global market share, and performance with respect to different source markets.

Core data specific to the tourism sector relate to visitor flows, expenditure and the structure of the sector. Regular and consistent collection of data is required on international visitors (predominantly inbound, but also outbound) and domestic visitors (both same-day and overnight visitors). This information may be collected through surveys at points of entry, accommodation establishments or other locations as well as through household surveys on visitor activity and expenditure or business registers. Key data from the supply side (i.e. on those industries supplying to visitors) includes the number and size of tourism businesses, their commercial activities, and levels of employment and pay. Where possible data should seek to measure both the formal and informal sector, as the latter is particularly important for poverty reduction.

Statistical information on tourism's multiple facets is pivotal in advancing knowledge of the sector, monitoring progress, promoting results-focused management, and highlighting strategic issues for policy decisions. In 2011, as part of an effort to boost the international comparability of tourism data whilst engaging countries in considering a wider spectrum of (oftentimes, available) tourism data, UNWTO significantly expanded the amount of statistical data and indicators it requests from countries and compiles in the *Compendium of Tourism Statistics*⁴⁵. The *Compendium* provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on the number and types of tourism industries⁴⁶, the number of employees by tourism industries, and macroeconomic indicators related to international tourism.

As a complement to such information, and inevitably based on it, UNWTO advances the Tourism Satellite Account (TSA) as the way to measure the economic contribution of tourism. This involves the use of data from the demand side (the acquisition of goods and services while on a tourism trip) and from the supply side (the value of goods and services produced by industries in response to visitor expenditure) of the economy. A methodological framework for drawing up a TSA has been defined, agreed on and

⁴⁴ PARIS21 (2011) *Statistics for Transparency, Accountability and Results: A Busan Action Plan for Statistics*

⁴⁵ UNWTO (2013) *Compendium of Tourism Statistics*

⁴⁶ The term 'tourism industries' used here may also be referred to as 'tourism activities'. A number of different tourism industries (such as accommodation) make up the tourism sector.

documented⁴⁷ by the international community (with the approval of the UN) and is being followed in a number of countries. The TSA is comprised of ten tables covering: inbound tourism expenditure; domestic tourism expenditure; outbound tourism expenditure; internal tourism expenditure (inbound plus domestic); production account of tourism industries; Gross Value Added (GVA) and Gross Domestic Product (GDP) attributable to tourism demand; employment; investment; government consumption; and non-monetary indicators. The production of a TSA is a sizeable undertaking, requiring considerable human and financial resources, but this is justified by its value as a robust advocacy and planning tool. In countries or situations where in the short term the resources cannot be made available to start the development of a TSA, first some general capacity building support could be provided to strengthen the system of national tourism statistics.

Issue 1

The quality of data collection and analysis

Questions to assess the issue and identify weaknesses/needs

(a) Is there regular and comprehensive collection of data on visitor arrivals, profiles and activities?

Developing countries vary considerably in their national systems of statistics and, inevitably also conditioned by it, in the scope and quality of the core tourism data that is collected and made available. UNWTO has identified in its Compendium of Tourism Statistics the set of data and indicators that can be considered "core" for most countries⁴⁸. Weaknesses in countries' systems of tourism statistics may relate to frequency of collection, gaps in content and methodology employed. Technical assessment of sufficiency may be required.

(b) Does the collection and presentation of data adequately cover and distinguish between domestic and international visitors and purpose of visit?

Domestic markets are becoming increasingly important in developing countries. They require different treatment in data collection. Furthermore, in order fully to understand the nature of tourism it is necessary to be able to recognise the different contribution made by trips for purposes of leisure, business and visiting friends and relatives.

(c) Is information collected on the structure and performance of the tourism sector and employment within it?

Some of this supply-side data may be available from the country's general industrial statistics. This may cover hotels, for example. However, further information may be needed from different types of tourism activities.

(d) What factors may be inhibiting the establishment of an effective data collection system?

A number of factors should be considered, including lack of commitment to measurement, lack of coordination between government agencies and private sector stakeholders, limited awareness of what is needed, lack of expertise and insufficient resources.

(e) Is a TSA or similar analysis undertaken to estimate the economic contribution of tourism?

Some countries may be engaged in the full TSA process, while others may be engaged in a more limited analysis of data to seek estimates of economic contribution or not be pursuing this at all.

⁴⁷ UNWTO (2008a) *Tourism Satellite Account: Recommended Methodological Framework* and UNWTO (2008b) *International Recommendations for Tourism Statistics*, 2008

⁴⁸ These include data on: visitors (overnight, same day, origin etc.); trips (purpose, duration, expenditure etc.); tourism industries (size, output etc.); and employment (number, status etc.)

(f) Are the needs and requirements of a TSA understood?

The TSA process is well documented but understanding of it can be assisted by capacity building exercises. The significant effort and level of resources needed to produce a TSA should be recognised.

(g) What factors may be inhibiting the development of a TSA?

Data collection issues as identified in (c) above may be a problem. Other factors may include the quality of National Accounts, cooperation between agencies, lack of expertise and insufficient resources to undertake the exercise.

(h) Can tourism data be sufficiently disaggregated to inform specific sustainability issues?

While this pillar is primarily about economic performance and its measurement, tourism data are also relevant to a range of social and environmental issues covered by other pillars. It is helpful to consider whether data that may be collected regularly on supply and demand is sufficient to inform issues such as the geographical spread of tourism to poorer areas, the gender balance in the industry etc. Data issues are also referred to under the individual pillars.

(i) Is data collection and analysis believed to be robust and has it been subject to external validation?

In some countries the reliability of data or their misuse affects the credibility of tourism statistics. It is important to seek an overall view on this and establish whether there have been any checks or more comprehensive validation of the data and procedures followed. Coordination with the National Statistical Office and Central Bank is key in this.

Possible actions to address the issue and improve the situation

- Raise awareness about the importance of collecting adequate statistical data for better managing tourism and its intended effects
- Strengthen commitment and coordination across government and industry on tourism data and analysis
- Review and assess tourism data collection procedures and strengthen where necessary
- Establish a TSA procedure where relevant and feasible
- Increase resources devoted to tourism data and analysis
- Provide capacity building in all aspects of tourism statistics and analysis

Existing Services relevant to the issue that can support possible actions:

- 2.01 Statistical Strengthening and Development of a Tourism Satellite Account (TSA)
- 2.02 Statistical Strengthening
- 2.03 Sub-National Tourism Measurement and Analysis Assistance
- 2.04 Regional Statistical Capacity Building Programme
- 2.16 Tourism Sector diagnostics, including Diagnostic Trade and Integration Studies (DTIS)

Development of TSA and enhancing tourist statistics in Botswana

In 2007 UNWTO completed a tourism statistics project in Botswana which culminated in the formulation of the first preliminary Tourism Satellite Account for the country. Given the interest raised by all stakeholders in the TSA exercise and the recognition that this is a continually evolving tool, the Ministry of Environment, Wildlife and Tourism decided to engage UNWTO in a new project with emphasis on developing staff skills in implementing the TSA and in improving the compilation and dissemination of statistics. This resulted in:

- The preparation of an updated Tourism Statistics Report for 2006-10, including data on international arrivals, key trip characteristics and tourist expenditure. It also contained analysis of performance of the accommodation sector, including employment and turnover.
- A complete analysis and statistical report on domestic tourism (the first of its kind)
- An updated TSA for 2009, which determined that tourism contributed 3.7% of GDP.

It is expected that the Ministry will continue to maintain the tourism statistics database, issue annual reports and maintain the partnership established with the Central Statistics Office, Immigration and Central Bank authorities in continuously updating the TSA in the future.

Pillar 2

2.2 Trade, investment and the business environment

The success of tourism as a driver of sustainable development in developing countries depends on the presence of policies and strategies for trade and investment that meet the needs of the sector and an overall business environment that is conducive to growth.

The context for tourism trade and investment will partly be set by a framework of national policies and international agreements. Crucially, tourism needs to be recognised in these. The country's tourism policy should be seen as setting the objectives and direction for the sector and must be taken into account in determining the parameters for promoting trade and investment in tourism. In turn, the tourism policy should be informed by a good understanding of the wider trade and investment situation in the country, regionally and globally.

Trade policy negotiations and implementation need to address tourism and take full account of its potential to expand exports and promote development. The OECD has observed that "Opening up markets to trade in services and investment could substantially contribute to the development of tourism. But any market opening needs to be properly designed and implemented, taking account of the social and environmental impact, if sustainable tourism and growth are to be achieved".⁴⁹

Tourism markets are opened through the General Agreement on Trade in Services (GATS) at the multilateral level. Many developing countries have made GATS commitments in Tourism and Travel-Related Services, more than in any other sector covered by GATS⁵⁰. Levels of commitment have varied between the different components of tourism (hotels/restaurants; travel agencies/tour operators; guides; and other services) and the GATS modes (consumption abroad; cross-border supply; commercial presence; and temporary movement of natural persons). In some aspects, countries have been concerned about the need to protect local suppliers. Various proposals have been made by groups of developing countries which underline the need for due regard for national policy objectives as well as reducing anti-competitive practices.⁵¹

⁴⁹ OECD (2008) *Opening up Trade in Services: Key for Tourism Growth*. February 2008.

⁵⁰ WTO (2009a) and (2009b) Background Notes on Tourism Services

⁵¹ UNCTAD, 2010, *The contribution of tourism to trade and development*

With regard to other services that affect tourism, the level of GATS commitments is often very low, especially for LDCs. It is notable that, of the current 33 LDC Members of the WTO, the number of countries that have made no commitments in certain key services were as follows: environmental services (22), transport (21), communication (20) and financial services (19), despite these all being major services sectors in which many LDCs are attempting to attract FDI⁵².

A number of Regional Trade Agreements also include tourism. These may often cover quite wide opportunities for cooperation as well as trade liberalisation, for example in joint promotion and development initiatives and facilitating tourist movements.

The further development and expansion of market opening in tourism needs to be pursued with full understanding of how this can be best approached to achieve maximum advantage for sustainable development, involving key stakeholders and informed by objective guidance from the relevant international agencies.

Policies on trade and investment are closely linked. A successful tourism sector requires investment to occur in a wide range of fields. This includes the provision of infrastructure, such as for transport, communications, energy and waste treatment, as well as the provision of tourism facilities and services. Investment may be undertaken directly by government, by the private sector or through various forms of partnership.

Foreign Direct Investment (FDI) can play an important role in the tourism sector in developing countries. A study in 2007 found that the percentage of FDI in tourism was quite low but was expanding⁵³. Benefits of FDI or non-equity engagement of trans-national corporations in the provision of tourism services include market awareness, economic stability, high standards and skills levels and potential to transfer knowledge. However, disadvantages include dependency on investment decisions taken externally and a potential for higher economic leakage.

Governments can take action to stimulate tourism investment, whether foreign or local, through a range of measures, which might include the availability of funding and credit, economic incentives, land provision, site identification, direct promotion and provision of advice and other support to investors. Public-private partnerships also provide a mechanism to generate investment, as covered under Pillar 1.

A fundamental requirement, not only for investment but also for the successful operation of tourism enterprises, is for the overall business environment in the country to be conducive to efficiency, new developments and growth. A wide range of factors include issues such as security and safety, transparency and good communications. The nature and application of regulations relating to new investment (e.g. licensing requirements) is particularly important. These should be at the right level so that they do not prevent entry to the sector but, equally, ensure that new enterprises have sufficient quality and professionalism. Special attention should be paid to the needs of small businesses, so prevalent in the tourism sector, which may be more dependent on the external environment.

It is important to appreciate that many of the requirements of the tourism sector may be met by general interventions to improve the business enabling environment in a country. International agencies, including the EU, support developing countries in their efforts to improve the business environment through reforms to the policy, legal, institutional and regulatory conditions that govern business activities. Programmes of reform may influence both the informal and formal economy, including the ability of enterprises to transition between them. Tourism should be integrated into such programmes that are related to trade and private sector development as a whole.

⁵² Honeck (2012), *LDC Export Diversification, Employment Generation and the "Green Economy": What role for tourism linkages?*

⁵³ UNCTAD (2007) *FDI in Tourism: The Development Dimension*

The many opportunities which tourism presents to build linkages between businesses, forwards, backwards and sideways, within tourism and cross-sector, should be pursued as a key strategy in increasing the benefit to the local economy.

Trade in tourism can also be significantly affected by issues that may discourage travel from certain countries. Of particular importance in this regard are the visa requirements that may be in place.

Issue 1

Recognition and treatment of tourism in trade and investment policies and commitments

Questions to assess the issue and identify weaknesses/needs

(a) Is tourism policy explicitly reflected in national policies concerning the promotion of trade and investment?

Overall policies on trade and investment may be articulated in policy documents or be identifiable through actions taken. Recognition of tourism should be clearly evident in them. Furthermore, it is important to check whether the country's tourism policy, where it exists, has been referred to and used as a guideline in trade negotiations and investment promotion.

(b) Does the tourism policy take account of the trade and investment policies of the country?

The tourism policy is likely to call for increased trade and more investment in the sector. The extent to which it recognises the wider trade and investment policy and context in the country, so ensuring that tourism is in line with this and benefits from it, should be checked.

(c) Has the country made GATS commitments in tourism and other relevant services sectors?

This will vary between countries. The coverage of commitments in tourism and other relevant services sectors in relation to different modes within GATS, such as commercial presence and labour mobility, should be considered.

(d) Has the country made other international trade commitments and do they include tourism?

These may include commitments with trading blocks, regional groupings and individual countries.

(e) Do trade commitments respect the principles of sustainable tourism in terms of impact on the environment, society and the local economy?

This may be quite difficult to assess without a specific analysis of the agreements. However, it is important to determine whether due attention has been paid to the needs of the individual country with respect to retaining sufficient control over matters that affect the environment, society and the local economy over time. The degree of stakeholder engagement and awareness should be considered.

(f) Do policies on FDI balance the need to encourage investment in tourism with the need to respect the principles of sustainable tourism?

As with formal trade agreements, the overall promotion and approach to FDI should seek actively to stimulate investment and recognise the needs of investors but also ensure that the resulting projects are sustainable and generate local economic benefit.

(g) Are visa policies and procedures conducive to encouraging tourism?

In many developing countries the costs and procedures involved in obtaining visas can place the country at a competitive disadvantage. Relevant actions include reducing the number of countries for which a visa is required, simplifying and facilitating procedures, such as enabling visa on arrival, and ensuring that charges are reasonable.

Possible actions to address the issue and improve the situation

- Review national trade and investment policies and ensure they take full account of tourism
- Review coverage of trade and investment in tourism policies
- Work on the development and scheduling of commitments under GATS and other trade negotiations to achieve maximum benefit for sustainable tourism
- Strengthen knowledge and capacity of policy makers and officials involved in trade negotiations relating to tourism
- Ensure policies on FDI are positive but also embrace sustainable tourism principles, with actions to increase linkages and local benefit.
- Address visa requirements and procedures

Existing Services relevant to the issue that can support possible actions:

- 2.05 *Development of Investment Policies on Tourism*
- 2.11 *Development of Integrated Trade Policy for Tourism*
- 2.12 *"Train for Trade" programme: building national capacities on sustainable tourism for development*
- 2.13 *Scheduling GATS commitments: WTO assistance and training*
- 2.14 *Aid for Trade*
- 2.16 *Training Negotiators for Trade in Services (tourism)*

Issue 2**Extent of tourism investment and conduciveness of the business environment****Questions to assess the issue and identify weaknesses/needs****(a) Have significant levels of investment in tourism-related infrastructure been occurring in recent years and from what sources?**

It is important to form an overall picture of the extent of investment in key infrastructure such as airports, roads and other transport systems, telecommunications, energy and other services. This is likely to be led by government, but may involve mixed funding.

(b) Have significant levels of investment in tourism facilities/business been occurring in recent years and from what sources?

This includes the extent of investment in new hotel capacity and other facilities and services. It may be possible to gain a general indication of the extent to which this is FDI or local investment.

(c) Have actions been taken to promote and support investment in tourism

These may include promotional activity, financial incentives and other forms of support. Consideration should be given to the extent to which the country's investment promotion agency has been engaged in supporting tourism investment and is knowledgeable about the sector.

(d) What are seen as the main barriers for securing more investment in tourism?

Barriers to consider include general market position and trends, domestic regulations, land availability, finance, etc. It is important to determine the extent to which government and other stakeholders are knowledgeable about these barriers. Industry bodies may be best placed to have an overall picture. This may point to the need for more systematic analysis.

(e) How available is finance for the development and operation of tourism businesses?

Availability of finance for tourism investment is an area which may be addressed by specific policy interventions and it is important to understand in particular the extent to which this is an issue for all kinds of tourism business, including SMEs.

(f) In general, how conducive are conditions for doing business in the tourism sector and where do most problems lie?

Conditions for business include factors such as security, regulations, accessibility, ICT provision and available skills. Industry bodies should be in a position to provide an overall picture.

(g) Have actions been taken to strengthen business linkages within tourism and with other relevant sectors?

These linkages may be between service providers in developing tourism offers, between businesses in the tourism supply-chain, or in other business to business contact. They may be developed between foreign and local firms, local to local, and between sectors. Actions can include information provision, networking, or specific support and may involve integrated projects. This is further covered under Pillar 4 on poverty reduction.

Possible actions to address the issue and improve the situation

- Strengthen recording and knowledge of the extent of investment in tourism
- Ensure tourism needs are fully accounted for in infrastructure planning and financing
- Review barriers to tourism investment and develop a programme to address them within the tourism strategy
- Review and strengthen sources of finance for tourism investment
- Address specific weakness affecting the business environment within the tourism sector
- Work on developing business to business linkages

Existing Services relevant to the issue that can support possible actions:

2.05 *Development of Investment Policies on Tourism*

2.17 *Facilitation of Demand –driven business linkages between agri-food, creative industries and service providers and the tourism sector*

2.21 *Tourism Business Development*

Pillar 2

Tourism business support and linkages in Kyrgyzstan

Since its independence in 1991, Kyrgyzstan has been struggling on its way back to liberalisation and market development. A particular opportunity rests with tourism, owing to the stunning beauty of the country's mountainous landscapes. Tourists come principally from other Central Asia countries and from Russia, whereas the European market represents an opportunity to be further explored and developed.

The Tourism for Kyrgyzstan project, funded by the EU between 2008 and 2010, involved international and local partners, the latter including the Businessmen Association of Kyrgyzstan and the Guilds of Directors. The project involved establishing a cooperation network of Business Intermediaries operating in the tourism sector, enabling them to deliver appropriate capacity building to their associates, to organize benchmarking and match-making events and to undertake in-depth market research. Actions were also targeted at the attraction of foreign investment.

2.3 Brand, marketing and product positioning

The development and promotion of the country's brand image and range of products in order to meet the needs of the market is vital to the competitiveness of the tourism sector. This is about raising awareness and attracting interest but also about increasing the length of stay and level of spending from visitors and encouraging repeat visits and recommendations.

Defining and articulating a distinctive brand for the country is the key to effective marketing, providing the basis for promotional messages and guiding product development so that it can deliver on the brand promise. The brand, which is far more than a logo or slogan, sums up the whole competitive identity of a destination, representing its core essence and enduring characteristics. Brand development should be based on consultation with local stakeholders and be well informed by market research.

A well-developed marketing plan should be a key component of a country's tourism strategy. It should stem from the careful selection of target markets based on product strengths, current performance and global trends. A well-resourced and coordinated programme of promotional activity should be supported by the government and private sector, using a range of communication techniques.

Tourism products should be of the quality and variety to attract and retain the target markets. A problem in many developing countries is the lack of consistency in product quality, which can affect competitiveness. This may be helped by having effective systems for setting, inspecting and reporting quality standards, such as hotel classification systems or tour guide standards and licensing. These systems in turn can point to where investment is needed and encourage businesses to respond. Product development, innovation and diversification should be fully informed by an understanding of market trends and the current strengths and weaknesses of the existing product portfolio. This should link to strategies and actions to guide and stimulate investment.

Issue 1

Clarity and focus of the brand and marketing plan

Questions to assess the issue and identify weaknesses/needs

(a) Does the country have an established brand identity that is well articulated and maintained?

Some countries may have a logo and strapline but may not have fully articulated the brand, relating this to concepts and promotional messages. It is also important to consider how widely the brand is used by tourism stakeholders. Actions should ensure that the brand image is well maintained and developed, including consideration of reflecting this in sub-brands.

(b) Is there a marketing plan which identifies target markets and provides a framework for promotion?

There should be a clearly identifiable marketing plan which is sufficiently comprehensive and detailed to guide a marketing programme and is based on market assessment and the identification of target markets. It should be closely tied in to the overall tourism strategy and master plan. It should set out actions to be followed.

(c) Are all key public and private stakeholders engaged in implementing the marketing plan?

The National Tourism Organisation or equivalent body may be seen as the main vehicle for implementing the marketing plan. However, it is important that there is strong support and participation from private sector associations and individual businesses and other relevant tourism stakeholders.

(d) Is the marketing plan fully implemented and what, if any, are the barriers to this?

The NTO and industry bodies should be able to identify any issues associated with implementation. Barriers may include lack of financial or human resources, limited skills, poor support from industry, or problems with the plan itself.

(e) Is the current marketing activity making full use of new technology, social media and other e-marketing opportunities?

ICT and the advent of social media provide particular opportunities for developing countries to access and influence markets effectively without incurring major cost. It is important to determine whether the country has been able to embrace these opportunities or whether improved skills, technology or application is needed.

Possible actions to address the issue and improve the situation

- Establish or strengthen brand development, articulation and dissemination
- Strengthen market research as a basis for brand development and marketing planning
- Ensure that there is a current marketing plan with annual action programmes identified, supported by the private sector
- Address barriers to implementing the marketing plan.
- Improve marketing skills, including in the application of ICT, including social media and other e-marketing tactics
- Consider and pursue opportunities for regional cooperation in marketing campaigns

Existing Services relevant to the issue that can support possible actions:

2.06 Marketing and Promotion Plan

2.07 Capacity Building Workshop on Tourism Marketing Planning

Destination branding and marketing in KwaZulu-Natal

Tourism Kwa-Zulu Natal (TKZN) is a South African Provincial DMO with a mandate to develop and promote the tourism product in the area. Since its inception TKZN has recognised the value of branding. It has based this on the concept of 'The Zulu Kingdom' which it found to resonate strongly with local stakeholders and, from consumer research, with key markets. It has shaped the direction of the area's product diversification and its marketing messages.

TKZN also recognized the power of the internet for building awareness of the brand. Web presence, through a framework of portals and websites, has been designed to reflect brand guidelines, with images and content reflecting the core attributes of the brand and sub-brands. A range of e-marketing techniques are employed to drive business to the websites and build consumer relationships, including content management, search engine optimisation, and use of social media, with levels of utilisation carefully monitored.

Issue 2

Quality and diversity of the product offer

Questions to assess the issue and identify weaknesses/needs

(a) How consistent is the quality of tourism products and services and is this improving?

While a comprehensive assessment of product quality would require a research study, the situation should be understood by tourism officials and representatives of the industry. Tour operators and tourist media should also have relevant experience. A general view should be sought on quality levels and also the extent to which quality has been improving not just at the top end but in terms of overall consistency.

(b) Are there effective systems for setting, inspecting and reporting on quality standards?

Some developing countries have schemes for inspecting accommodation and other tourism facilities not only for meeting basic requirements, such as hygiene, but also against a set of quality standards. The question is not only about the presence of schemes but also their coverage and effectiveness and what problems may exist with them.

(c) Have steps been taken to identify product gaps and increase diversification?

This should be fully covered in the tourism strategy. The extent to which actions have been taken to diversify the product should be considered, together with a view on whether this remains a particular issue to address.

Possible actions to address the issue and improve the situation

- Support investment and capacity building to improve quality
- Establish or strengthen a quality system, with standards and inspection
- Review the product offer against market expectations and trends
- Strengthen action to develop and diversify the product

Existing Services relevant to the issue that can support possible actions:

- 1.06 *Quality Standards in Tourism Services*
- 1.07 *Practical Guidelines for Destination Quality Performance*
- 2.08 *Product and Services Development and Diversification*
- 2.09 *Tourism Product Development Seminar*
- 2.18 *Supply Capacity Building and Quality of Products and Services to Meet Market Requirements*

2.4 Resilience and risk management

A feature of the tourism sector is the range of factors that influence tourists' decisions to travel and their choice of destination, coupled with the range of options available to them. Developing countries face competition not only from each other but from developed countries and other forms of discretionary spending in leisure and recreation. This level of competition and market elasticity means that an individual destination can be very susceptible to external influences on markets.

The sector can be significantly affected by a variety of negative circumstances that may build up over time or be more sudden occurrences or shocks. These may be internal or external. Internal examples include economic instability, rising crime, local flooding, localised health scares or serious security incidents. Occurrences involving tourists can have a particularly strong impact. Not only should such situations be avoided in their own right, they can also damage the brand. External examples include global environmental events, pandemics, economic crises or incidents affecting major source markets.

A positive aspect of the sector is the tendency for demand to recover quickly aftershocks and setbacks. However, it is very important that strategies are in place to build resilience, minimise risk and to deal with crises, which may include:

- Being aware of all potential risks
- Introducing early warning systems
- Making provision for the security of visitors and assistance available to them
- Avoiding over-dependency on particular markets and related products
- Handling crises professionally, such as through communication and information management.

Issue 1

Level of attention paid to risk and crisis management

Questions to assess the issue and identify weaknesses/needs

(a) Is risk minimisation and crisis management considered in tourism strategies and plans?

Reference to resilience and risk management may be made in general tourism strategies. It is also appropriate for countries to have separate risk and crisis management plans, as referred to in (e) below, which should be linked to the tourism strategy.

(b) Are specific measures taken to provide for the security and wellbeing of tourists?

This may include a range of measures. Some countries have specially identified tourist police. Special attention may be given to minimising tourist health risks. Providing helpful information to visitors on minimising risk is very important.

(c) Is risk-spreading and avoidance of dependency taken into account in the selection of markets and products?

Individual markets can be prone to sudden decline, for example as a result of economic problems, loss of an air route or withdrawal by a tour operator. Pursuing opportunities to develop domestic and regional markets can be a good strategy.

(d) Is there a plan in place to handle emergencies and crises?

This may involve collaborative action between different sectors of government and private sector bodies. Information handling and local and international media strategies should form a key part of the approach.

Possible actions to address the issue and improve the situation

- Refer to risk and crisis management in tourism strategy and link to specific plan for this
- Review security provision and information delivery for tourists
- Review market and product strategies to avoid over-dependency
- Support capacity building and planning for risk and crisis management

QUESTIONNAIRE -PILLAR 2 ECONOMIC PERFORMANCE, INVESTMENT AND COMPETITIVENESS

To facilitate a quick assimilation of the situation, the columns after the questions provide the opportunity to allocate a score if applicable. This is based on the following scale:

1	Area of particular need/opportunity – highest priority for action/intervention	Priority for action High  Low
2	Improvement required – should also be considered for intervention/support	
3	May benefit from some improvement – but less current need for intervention	
4	Appears to be satisfactory – maintain	
5	Area of apparent strength – may provide an example to others	
X	No information available to answer the question /This could not be assessed	

2.1 Measuring tourism and its contribution to the economy

Issue 1: The quality of data collection and analysis						
	QUESTION	COMMENT	Priority for action			
			High	Low	1	2
a	Is there regular and comprehensive collection of data on visitor arrivals, profiles and activities?					
b	Does the collection and presentation of data adequately cover and distinguish between domestic and international visitors and purpose of visit?					
c	Is information collected on the structure and performance of the tourism sector and employment within it?					
d	What factors may be inhibiting the establishment of an effective data collection system?					
e	Is a TSA or similar analysis undertaken to estimate the economic contribution of tourism?					
f	Are the needs and requirements of a TSA understood?					
g	What factors may be inhibiting the development of a TSA?					
h	Can tourism data be sufficiently disaggregated to inform specific sustainability issues?					
j	Is data collection and analysis believed to be robust and has it been subject to external validation?					

2.2 Trade, investment and the business environment

Issue 1: Recognition and treatment of tourism in trade and investment policies and commitments						
	QUESTION	COMMENT	Priority for action			
			High	Low	1	2
a	Is tourism policy explicitly reflected in national policies concerning the promotion of trade and investment?					
b	Does the tourism policy take account of the trade and investment policies of the country?					
c	Has the country made GATS commitments in tourism and other relevant services sectors?					
d	Has the country made other international trade commitments and do they include tourism?					
e	Do trade commitments respect the principles of sustainable tourism in terms of impact on the environment, society and the local economy?					
f	Do policies on FDI balance the need to encourage investment in tourism with the need to respect the principles of sustainable tourism?					
g	Are visa policies and procedures conducive to encouraging tourism?					

	QUESTION	COMMENT	Priority for action							
			High	Low	→	1	2	3	4	5
Issue 2: Extent of tourism investment and conduciveness of the business environment										
a	Have significant levels of investment in tourism-related infrastructure been occurring in recent years and from what sources?									
b	Have significant levels of investment in tourism facilities/business been occurring in recent years and from what sources?									
c	Have actions been taken to promote and support investment in tourism									
d	What are seen as the main barriers for securing more investment in tourism?									
e	How available is finance for the development and operation of tourism businesses?									
f	In general, how conducive are conditions for doing business in the tourism sector and where do most problems lie?									
g	Have actions been taken to strengthen business linkages within tourism and with other relevant sectors?									

2.3 Brand, marketing and product positioning

Issue 1: Clarity and focus of the brand and marketing plan									
a	Does the country have an established brand identity and is this well articulated and maintained?								
b	Is there a marketing plan which identifies target markets and provides a framework for promotion?								
c	Are all key public and private stakeholders engaged in implementing the marketing plan?								
d	Is the marketing plan fully implemented and what, if any, are the barriers to this?								
e	Is the current marketing activity making full use of new technology, social media and other e-marketing opportunities?								
Issue 2: Quality and diversity of the product offer									
a	How consistent is the quality of tourism products and services and is this improving?								
b	Are there effective systems for setting, inspecting and reporting on quality standards?								
c	Have steps been taken to identify product gaps and increase diversification?								

2.4 Resilience, security and risk management

Issue 1: Level of attention paid to risk and crisis management									
a	Is risk minimisation and crisis management considered in tourism strategies and plans?								
b	Are specific measures taken to provide for the security and wellbeing of tourists?								
c	Is risk spreading and avoidance of dependency taken into account in the selection of markets and products?								
d	Is there a plan in place to handle emergencies and crises?								

PILLAR 3 Employment, Decent Work and Human Capital

Tourism is a labour intensive sector that creates many jobs at all levels. According to ILO and UNWTO, the global tourism sector accounted for more than 235 million jobs in 2010 representing 8% of global direct and indirect employment, or one in every 12 jobs. It is forecasted that by 2019, the global sector will grow to 296 million jobs⁵⁴.

In most developing countries tourism offers opportunities for local residents to generate income and to participate in decent work. Where tourism is well established it is often the sector that contributes the greatest number of jobs. With low barriers to entry and a wide employment multiplier-effect, it can provide possibilities for people who otherwise may find it difficult to earn a living. Through providing employment, tourism can benefit disadvantaged groups, including women, stimulate entrepreneurship and MSMEs and contribute significantly to poverty alleviation, a topic covered more fully in Pillar 4.

To set against these benefits, conditions of work in the tourism sector can be poor. In places tourism employment can be characterised by unsocial and irregular working hours, low pay, low job security, a lack of social security and protection, weak career prospects, unhealthy working conditions, and vulnerability to discrimination and exploitation⁵⁵. A high proportion of seasonal and part time jobs, is a common feature of tourism employment, although this can sometimes fit in well with social patterns and needs.

There are five main reasons why sound policies and action in the area of employment and human resources are critical to sustainable development through tourism:

- The provision of accessible opportunities for employment, available to all, is central to economic development
- The availability of labour with sufficient aptitude and skills is a key requirement of successful tourism businesses
- The way that people who work in tourism perform their jobs and relate to visitors makes a huge difference to the quality of the visitor experience
- Concern about working conditions and employee welfare must be seen as a fundamental principle of sustainable tourism in its own right⁵⁶.
- The availability of knowledge and skills in certain specific areas is important for the sustainability of tourism.

It can be seen immediately that all five of these reasons are closely interrelated.

Two sub-pillars are identified for assessment:

- **Human Resources⁵⁷ planning and working conditions**
The development and implementation of policies, strategies and plans for the provision of employment, the management of human resources and the assurance of decent work, based on widespread consultation with all involved actors.
- **Skills assessment and the provision of training**
Understanding the needs of the tourism sector and employees for improved skills, including in topics related to the sustainability of tourism, and strengthening the availability and quality of training in the country in order to meet these needs.

⁵⁴ ILO (2010): *Developments and challenges in the hospitality and tourism sector*

⁵⁵ Ibid. A number of other reports and studies have also documented such conditions, including: *Labour Standards, social responsibility and tourism*, Tourism Concern (2004) and ILO (2011)

⁵⁶ Employment Quality is one of the 12 principles of sustainable tourism (UNWTO and UNEP, 2005)

⁵⁷ The term Human Resources is used in this document as being synonymous with the term Manpower when referring collectively to the provision of people working in the tourism sector or available to it.

3.1 Human Resources planning and working conditions

The importance of human resources for the success and sustainability of tourism means that their planning should form an integral part of tourism policies and strategies for all countries. Specific HR plans should exist that set out and guide actions. HR plans should include three main components, considered below:

Employment creation and management

This addresses the supply and demand for jobs in the sector. HR plans should cover needs and opportunities, including:

- creating and increasing employment in the tourism sector in line with forecast market growth and the expected future development of tourism in the country
- retaining skilled workers within the sector and within the country
- ensuring flexibility in the labour market and managing labour migration to cope with seasonality and fluctuations in demand
- increasing opportunities for full time, year-round jobs
- encouraging recruitment by reducing non-wage costs such as employer contributions
- outlining policies, actions and incentives to encourage tourism firms to employ local residents as well as certain categories of workers such as women, minorities and disadvantaged groups (e.g. older workers, people with disabilities)
- promoting tourism and hospitality as a valid profession with recognised career paths and enhancing career progression and opportunities.

Employee rights and decent work

HR policies and plans should commit to these principles and address how they can be secured across the tourism sector. ILO defines **Decent Work** as “work that is productive and that delivers:

- a fair income
- workplace security and social protection for families
- better prospects for personal development and social integration
- freedom for people to express their concerns, organize and participate in decisions that affect their lives
- equality of opportunity and treatment for all women and men.”

The Decent Work Agenda rests on four main pillars: 1) Job creation; 2) Rights at work; 3) Social protection; and 4) Social dialogue.⁵⁸

Human Resource Development (HRD)

This covers the needs of employees in terms of skills and development in order to achieve their goals and those of the sector, and how these can be met through learning and training. While this is covered separately under sub-pillar 3.2, the subject and related actions should be included in the HR plan.

Issue 1

The existence and scope of a Human Resources policy, plan and actions, discussed and agreed with the private sector and other stakeholders

Questions to assess the issue and identify weaknesses/needs

(a) Is tourism reflected in the overall national Human Resources policies and plans?

Some countries may have central policies and plans for HR but in others they may be sector based. They should recognise both the needs of the tourism sector and the contribution that it can make.

⁵⁸ ILO (2011) *Toolkit on Poverty Reduction through Tourism*

(b) Is there a discernible HR policy and plan for tourism, linked to an overall Tourism Policy/Master Plan?

Some countries may have a separate HR plan for tourism. Where this exists it should be closely linked and referred to in the overall tourism policy and strategy or master plan. Alternatively, the latter may contain sufficient policies and actions covering this subject without there being a separate dedicated HR plan.

(c) How comprehensive is the country's HR plan and/or actions in this field?

The approach should cover the three main aspects of HR planning referred to above, namely;

- Employment creation and management - including an assessment of HR needs over time and delivery of the required workforce
- Employee rights and decent work – recognising them and ensuring their delivery
- HRD – skills needs assessment and provision of training.

(d) Are there trade unions or other workers' representatives active in the sector?

The fragmentation of the tourism sector and the lack of representative bodies for employees can be a disadvantage for HR planning and may be a reason for insufficient attention to working conditions.

(e) Have bodies representing private sector tourism businesses addressed HR issues?

The engagement of private sector enterprises in committing to employment creation and HR development is essential for success. This should not just be in response to government policy and action. The independent actions of individual business are of particular importance. However, this can be encouraged, assisted and spread within the industry through the work of bodies such as hotels associations or chambers of commerce. In some countries such associations have established separate HR committees. Agreement on principles and standards of employment for members to follow can be very helpful in promoting good practice.

(f) Is there consultation and dialogue on HR planning with all stakeholder representatives?

Consultation and dialogue with all involved players, including, employer and employee representatives, as well as government and civil society, should provide the basis for preparing and implementing HR plans. This incorporates the concept of 'social dialogue' which is a term used in HR planning which is defined as "... all types of negotiation, consultation and exchange of information between governments, employers and workers on issues of common interest"⁵⁹. Consultation and dialogue should be a continual process, so that grievances and issues can be easily addressed on both sides and opportunities can be taken together to strengthen the delivery of services and the performance of the sector to the benefit of all.

(g) Are there incentives and initiatives for promoting employment, including to particular groups?

Provision of employment opportunities is essentially a function of businesses, occurring in response to market growth and investment. However, certain actions can be taken to stimulate businesses to provide jobs, including offering financial incentives, for example through the tax system. This can be applied selectively, for example with respect to employing local residents, youth and women, minorities, or people with particular needs. It should be noted that support for investment projects and marketing, as covered under Pillar 2, can also be seen as part of the strategy to generate employment in tourism.

⁵⁹ Ibid

Possible actions to address the issue and improve the situation

- Develop or strengthen HR policies, plans and actions, in the context of overall tourism policies, strategies and plans
- Encourage private sector trade bodies to discuss and address HR issues, including agreeing on employment standards
- Encourage the formation of responsible bodies to represent the needs of employees in the tourism sector
- Ensure that social dialogue is pursued as a continuous process
- Consider using incentives to stimulate employment of certain kinds.

Existing Services relevant to the issue that can support possible actions:

- 3.01 *Manpower Planning for the Tourism Sector*
- 3.04 *Strengthening Decent Work*
- 3.05 *Strengthening the Role of Women in Tourism*

Human Resources Needs Analysis and Action Plan for Oman

With tourism undergoing structural expansion in Oman, one of the principle challenges is the demand for labour in coming years, both in traditional hospitality services and new and diversified tourism product. In 2010-12 the UNWTO supported a study of the situation, in line with the Government's Omanisation Policy and in collaboration with the private sector and education and training institutions. The study involved qualitative and quantitative research to identify challenges and provide recommendations. Outputs included:

- An extensive database of enterprises, training and education institutions operating in the sector
- A Tourism Manpower Needs Analysis, involving current industry surveys and quantitative projects based on planned new developments. This also looked at skills availability and shortages, recruitment practices, training provision, perception of tourism within Omani society and career development opportunities
- A Human Resources Development Action Plan, which provided a strategic framework with targeted policies and actions towards meeting future labour demand, closing skills gaps and enhancing service quality, widening training provision, improving institutional coordination and increasing job opportunities for Omanis.

Pillar 3

Issue 2

Ensuring that workers' rights and conditions for decent work are met

Questions to assess the issue and identify weaknesses/needs

(a) Is the tourism sector respecting workers' rights and meeting the conditions of decent work?

Although it is important to make sure that policies and actions concerning decent work are included in the country's approach and actions for sustainable tourism, it is necessary also to consider the extent to which working conditions in the sector are currently a problem. It is important to check whether this has been recently assessed. If not, views should be obtained from government, employee's representatives, relevant NGOs and the industry. A more systematic study may be considered as a future action.

(b) Does legislation provide a sufficient basis for requiring and enforcing decent work in the tourism sector?

In most countries the legislation that covers employee's rights and conditions of work is contained in general labour laws rather than in legislation specific to a particular sector. A first question to consider therefore is whether the country does have comprehensive labour laws that meet the requirements of international conventions⁶⁰. The situation should be able to be clarified by relevant international bodies in the country. Any specific tourism legislation (as referred to in Pillar 1) should underline the need for compliance with labour laws. If the latter are insufficient, then this may need to be addressed in tourism law.

(c) How effectively are labour laws and related regulations applied in the tourism sector?

A critical question is the extent to which labour laws, backed up as appropriate by tourism legislation, are complied with and enforced within the tourism sector. This can be quite varied and is not helped by the fragmented nature of the sector, the presence of many small businesses and the size of the informal tourism economy. Regulations covering the industry, as may be enforced through licensing, should require compliance. While comprehensive assessment of application, compliance, enforcement and effectiveness of legislation and regulations is difficult, a picture could be formed by consultation or specific study as mentioned under (a) above.

Possible actions to address the issue and improve the situation

- Undertake a review of conditions of work across the tourism sector, identifying any major problems and abuses
- Ensure that labour laws, reflected in tourism legislation, provide a sufficient basis for underpinning the requirements for decent work in the sector
- Review the application and enforcement of legislation and regulations
- Provide clear and simple guidelines for tourism business on application of good practice with and beyond the legal requirements.
- Ensure that employment issues and the decent work agenda are fully covered in tourism education and training curricula, especially at managerial level

Existing Services relevant to the issue that can support possible actions:

1.03 *Tourism Legislation and Regulation*

3.04 *Strengthening Decent Work*

3.2 Skills assessment and the provision of training

As a multi-faceted industry with complex employment patterns and levels, tourism requires a wide range of jobs from senior management and high tech to the provision of basic services. Typically the employment pyramid in the tourism sector has a broad base with a large number of unskilled and semi-skilled employees and many with craft and communication skills but with fewer supervisory and managerial positions. Employees at the lower levels are likely to interact with tourists. Providing them with skills in customer service is vital to the quality of the product offered by tourism businesses.

A lack of necessary skills amongst current staff can damage the performance of existing enterprises. Low skill levels within the population as a whole and amongst potential employees can hold back development of the sector and weaken the chances for local people to gain benefit from it. Tourism enterprises may find it difficult to recruit sufficient numbers of staff with necessary basic skills as well as people with specific craft and technical skills required for particular types of job, such as chefs.

⁶⁰ The ILO has identified eight fundamental conventions, concerning such subjects as collective bargaining, child labour and remuneration. They have summarised the principles they cover in ILO (1998) *Declaration on Fundamental Principles and Rights at Work*. Human Rights issues are covered in Human Rights Council (2011) the *Guiding Principles on Business and Human Rights*

Human Resources plans should indicate the number of jobs that may be provided in the future as tourism develops, together with the requisite skills level and the consequent amount of training provision that will be needed.

Poor skill levels in the sector may reflect weakness in management and insufficient priority given to human resources by individual enterprises. However, it can also be caused by an inadequate education system and lack of availability of appropriate training. Evaluation should therefore assess the scope and comprehensiveness of the courses on offer, their availability, frequency and distribution, the content of the curricula, the experience and knowledge of the teaching staff, and the adequacy of the facilities and material.

Vocational training necessitates a certain amount of classroom time but mostly on-the-job experience in a work environment. Institutions and tourism firms must cooperate in the preparation of training programmes and curricula that respond to the needs of the sector and the industry must be involved in the teaching process, providing students with placements and work experience.

Skills and related training should include an understanding of the concepts of sustainable tourism and their practical application, appropriate and relevant to the needs and positions of the personnel concerned. Amongst key stakeholders and at a managerial level, this may cover a wide range of economic, social and environmental issues and their implications, including the responsibilities of different stakeholders. However, practical aspects of sustainability, for example in environmental management processes, should also be included in vocational training. This should include the development of new skills relevant to 'green jobs'⁶¹ for example in conservation and interpretation. It is also important for there to be a sufficiency of skills in associated spheres, such as the management of cultural heritage sites. Curricular for training in these fields should include attention to tourism, while likewise tourism training curricular should include consideration of environmental and cultural heritage management. There may be a need to plan and develop more capacity building in relevant curricular development and delivery.

Some international development assistance agencies and NGOs are well placed to provide experience, support and guidance on training needs assessment and delivery in different sectors in developing countries. The European Training Foundation, for example helps certain transition and developing countries to harness the potential of their human capital through the reform of education, training and labour market systems in the context of the EU's external relations policy.

Issue 1

The level of understanding of skills gaps and training needs

Questions to assess the issue and identify weaknesses/needs

(a) Has an assessment of skills gaps and training needs been carried out, covering the existing industry and future development?

Some countries have undertaken systematic audit of skills available within the tourism sector as against the skills needed by the industry, thereby identifying gaps and consequent training needs. If this has occurred, it is important to check that it has covered all parts of the industry and is relatively up to date, and also whether it has looked forward to future needs as the sector develops.

⁶¹ Green Jobs are defined as work in various sectors, including service activities that contribute to preserving or restoring environmental quality. These include jobs that help to protect ecosystems and biodiversity, reduce energy, materials and water consumption, de-carbonise the economy and minimise or avoid generation of all forms of waste and pollution. UNEP (2008) "Green Jobs: Towards Decent Work in a Sustainable, Low-Carbon World"

(b) Is there perceived to be a lack of skills amongst current tourism workers and in what areas?

Where no previous study has been made, an initial impression of the extent and nature of the problem can be formed from consultation with industry bodies. This can also reveal whether a more systematic assessment is needed.

(c) Is there perceived to be a lack of available labour with necessary skills and in what areas?

Industry consultation can also throw light on possible problems with the recruitment of staff with requisite skills.

(d) Is there perceived to be a lack of knowledge of sustainable tourism and of related practical skills?

This should be considered at different levels, including amongst key stakeholders and in terms of relevant practical skills.

Possible actions to address the issue and improve the situation

- Undertake a systematic assessment of skills gaps and training needs in all parts of the tourism sector
- Identify future skills needs within the sector in the context of the tourism strategy and Human Resources plan

Existing Services relevant to the issue that can support possible actions:

1.01 *Tourism Development Master Plans and Strategic Development Plans*

3.01 *Manpower Planning for the Tourism Sector*

3.06 *Training Needs Analysis for a Destination*

Issue 2

The availability of sufficient training and capacity building institutions, standards and programmes

Questions to assess the issue and identify weaknesses/needs

(a) Has there been any systematic assessment of tourism training provision?

The amount of training relevant to tourism that is currently delivered or can be made available may be quite extensive but also fragmented. This can range across a spectrum from degree courses in tourism management to single day technical training and capacity building sessions delivered in situ. A systematic audit may be required to obtain a full picture.

(b) Are tourism training institutions and courses subject to quality accreditation?

Some developing countries have seen a burgeoning of private tourism education and training providers of varying quality. It is important to ensure that all such provision exceeds minimum standards in order to contribute to a good workforce quality.

(c) Is the number, capacity and accessibility of training bodies, institutions and teachers considered sufficient for the sector's needs?

Without a full assessment, perceptions of the nature and sufficiency of provision can be obtained from consultation. In developing countries there may be issues not only with the actual number of institutions providing training but with their capacity (i.e. the number of places available) and with their accessibility. Location can be a barrier, although sometimes provision is made for delivery of courses at a local level through travelling trainers, who may also use mobile training units. Often, capacity building programmes form part of local development projects.

(d) Do the training institutions have sufficient resources, including qualified staff and equipment?

Adequacy of training provision should be about quality as well as quantity. Issues include levels of experience and skill amongst the trainers themselves, as well as access to equipment and necessary financial resources.

(e) Is the range of managerial and technical courses available at different levels appropriate for the sector's needs?

It is important to establish whether the needs of the industry are being met by the range of training and capacity building that is available, which requires the right balance:

- Between education in tourism and hospitality as a career (for example for school leavers) and short training courses covering specific skills for people already in employment
- Between training in management, craft skills and other technical subjects and basic customer care and service training.

(f) Is there a system of skills standards and qualifications relevant to the needs of the tourism sector?

This should include entry level standards as well as standards and qualifications that recognise higher skills levels. These should be in line with equivalent regional and international standards for the sector. Certification structures and mechanisms should also be in place for the overseeing of standards and the granting of qualifications.

(g) Is tourism promoted as a career to young people, linked to training?

It is important to consider not just the availability of training but also the way tourism is promoted as a career, encouraging people to enter the sector and acquire the necessary skills and qualifications.

(h) Is sufficient training available in tourism sustainability issues and related skills?

Consideration should be given to the knowledge and experience of training institutions in this field as well as to the courses on offer. Vocational and technical skills training courses can appropriately cover practical sustainability issues, such as on conservation and environmental management. Higher level courses should cover sustainability and development issues more comprehensively.

Possible actions to address the issue and improve the situation

- Assess the amount of training facilities available, the level and nature of training provided to the sector and its relevance to the needs of the industry
- Review the resources available to training bodies to enable them to increase their capacity, the quality of training available and its accessibility across the country
- Review and strengthen funding mechanisms for tourism training, including the use of training levies
- Establish or strengthen systems of standards and qualifications
- Promote tourism as a career, including the training available
- Support development and integration of sustainability issues in tourism training courses
- Consider and pursue cooperation on regional standards, training facilities and exchange programmes

Existing Services relevant to the issue that can support possible actions:

3.01 Manpower Planning for the Tourism Sector

3.02 Capacity Building Programmes in Hospitality, Skills and Tourism Business Development

3.03 Skills Development, Education and Vocational Training, On-the-job Training and Increase of the Quality of Services

Tourism skills training and standards in Vietnam

A tripling of tourist arrivals to Vietnam in the ten year period to 2008 boosted employment in the country and contributed to reducing poverty. To respond to this growth, the industry has needed to improve the skills of some 750,000 people involved in tourism. In order to achieve this, the Human Resources Development in Tourism Project, funded by the European Union, set out to train a wide range of professionals, including teachers, hospitality workers and public administrators from all the provinces. The objectives were to upgrade the quality of the tourism workforce through a skills' recognition system that certifies competencies to international standards, and to sustain the number of skilled human resources by reinforcing institutional frameworks.

Outcomes from the project included:

- 3,400 persons trained to become trainers and 5,000 others registered to become trainers
- Entry level skills standards established for more than 75% of the tourism workforce, with nationwide assessment by the Vietnam Tourism Certification Board
- Skills' standards system harmonised with regional systems and recognised at the ASEAN level
- 1,000 officials trained in tourism management and 90 provincial directors receiving scholarships.

Issue 3

The level of engagement of the private sector in supporting training and capacity building

Questions to assess the issue and identify weaknesses/needs

(a) Has the private sector been engaged in skills assessment and design and provision of training courses?

The extent to which training programmes are meeting the needs of the sector will partly depend on the level of involvement of private enterprises in the design of courses. Furthermore, tourism enterprises should directly support the training process through engaging in delivery and providing work placements and other opportunities.

(b) Does the private sector make sufficient provision for training and career development for their staff and the local community?

For many tourism businesses, notably the larger companies, the provision of necessary training is primarily in their own hands. This can include on-going training for their own staff but also outreach work in the local community for potential future employees. In part, this is an issue of management objectives and prioritization.

Possible actions to address the issue and improve the situation

- Ensure full private sector engagement in assessment of skills and training provision
- Strengthen links between tourism training bodies and private enterprises
- Encourage an ethos of training provision within private enterprise

Existing Services relevant to the issue that can support possible actions:

3.01 Manpower Planning for the Tourism Sector

3.02 Capacity Building Programmes in Hospitality, Skills and Tourism Business Development

3.03 Skills Development, Education and Vocational Training, On-the-job Training and Increase of the Quality of Services

QUESTIONNAIRE- PILLAR 3 EMPLOYMENT, DECENT WORK AND HUMAN CAPITAL

To facilitate a quick assimilation of the situation, the columns after the questions provide the opportunity to allocate a score, if applicable. This is based on the following scale:

1	Area of particular need/opportunity – highest priority for action/intervention		Priority for action
2	Improvement required – should also be considered for intervention/support		High
3	May benefit from some improvement – but less current need for intervention		↓
4	Appears to be satisfactory – maintain		Low
5	Area of apparent strength – may provide an example to others		Priority for action
X	No information available to answer the question /This could not be assessed		

3.1 Human Resources planning and working conditions

Issue 1: The existence and scope of a Human Resources policy, plan and actions, discussed and agreed with the private sector and other stakeholders

	QUESTION	COMMENT	Priority for action						
			High	Low	1	2	3	4	5
a	Is tourism reflected in overall Human Resources policies and plans?								
b	Is there a discernible Human Resources policy and plan for tourism, linked to an overall Tourism Policy/Master Plan?								
c	How comprehensive is the country's HR plan and/or actions in this field?								
d	Are there trade unions or other workers' representatives active in the sector?								
e	Have bodies representing private sector tourism businesses addressed HR issues?								
f	Is there consultation and dialogue on HR planning with all stakeholder representatives?								
g	Are there incentives and initiatives for promoting employment, including to particular groups?								

Issue 2: Ensuring that workers' rights and conditions for decent work are met

a	Is the tourism sector respecting workers' rights and meeting the conditions of decent work?							
b	Does legislation provide a sufficient basis for requiring and enforcing decent work in the tourism sector?							
c	How effectively are labour laws and related regulations applied in the tourism sector?							

3.2 Skills assessment and the provision of training

Issue 1: The level of understanding of skills gaps and training needs

a	Has an assessment of skills gaps and training needs been carried out, covering the existing industry and future development							
b	Is there perceived to be a lack of skills amongst current tourism workers and in what areas?							
c	Is there perceived to be a lack of available labour with necessary skills and in what areas?							
d	Is there perceived to be a lack of knowledge of sustainable tourism and of related practical skills?							

Issue 2: The availability of sufficient training and capacity building programmes, standards and institutions

a	Has there been any systematic assessment of tourism training provision?							
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	QUESTION	COMMENT	Priority for action					
			High	1	2	3	4	
b	Are tourism training institutions and courses subject to quality accreditation?							
c	Is the number, capacity and accessibility of training institutions, bodies and teachers considered sufficient for the sector's needs?							
d	Do the training institutions have sufficient resources, including qualified staff and equipment?							
e	Is the range of managerial and technical courses available at different levels appropriate for the sector's needs?							
f	Is there a system of skills standards and qualifications relevant to the needs of the tourism sector?							
g	Is tourism promoted as a career to young people, linked to training?							
h	Is sufficient training available and provide in tourism sustainability issues and related skills?							
Issue 3: The level of engagement of the private sector in supporting training and capacity building								
a	Has the private sector been engaged in skills assessment and design and provision of training courses?							
b	Does the private sector make sufficient provision for training and career development for their staff and the local community?							

PILLAR 4 Poverty Reduction and Social Inclusion

Achieving a significant reduction in poverty is a major objective for sustainable development, globally and in all LDCs and developing countries. It is the first of the UN Millennium Development Goals (MDGs).

The role of tourism as a valuable force for poverty reduction has been formally recognised by international agencies and governments for some time. In 2002 the Johannesburg Summit on Sustainable Development identified tourism as a primary sector for poverty alleviation⁶². In 2005 a representative group of government, industry, UN agencies and civil society leaders urged "governments, international and bilateral development assistance agencies, financial institutions, private corporations, NGOs and other interested parties to fully recognize tourism, when sustainably developed and managed, as an effective tool to realize the Millennium Development Goals - especially poverty alleviation"⁶³. In June 2012 a key milestone for including tourism in the global development agenda has been achieved during the 2012 United Nations Conference on Sustainable Development (UNCSD) - Rio+20 - Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication. Tourism was included in the outcome document, "The Future We Want" acknowledging the contribution of tourism to sustainable development⁶⁴.

Social inclusion is a parallel international concern, requiring that the rights and needs of everyone, irrespective of their gender, age, race or ability, are fully recognised and that active steps are taken to provide opportunities for all disadvantaged people. The need for gender equality and promoting the position of women in society is underlined in the third MDG. In recent years many development assistance agencies have given priority to supporting opportunities for women and young people, who can relate well to the tourism sector.

It is important to appreciate that the concept of poverty can be considered in a number of ways. While income poverty is sometimes identified by reference to a global poverty line set at US\$ 1.5 per day, poverty may also be considered as a relative position of groups in society, affected in any one country by the level of inequality in the distribution of wealth and income. Poverty should also be seen as a condition relating not only to income but equally to other aspects of the quality of life, including the availability of opportunities for change and access to life support systems⁶⁵. Tourism can bring benefits but also pressures that affect all aspects of poverty.

There are many reasons why tourism is well placed to provide opportunities for the poor and other disadvantaged groups:

- It is a growing sector, which has proved its ability to deliver economic development⁶⁶.
- It is a sector in which developing countries can be at a comparative advantage, owing to their climate and wealth of natural and cultural assets.
- It can provide economic activity in places where there are few alternative opportunities, notably in rural areas which contain 70% of the developing world's extremely poor people⁶⁷.
- It is labour intensive as a sector.
- It is a diverse sector, providing the opportunity to support other economic activities, both through providing jobs that can complement other livelihood options and by creating demand through the supply chain.

⁶² UNDESA (2005) *Johannesburg Plan of Implementation*

⁶³ UNWTO (2005) *Declaration 'Harnessing Tourism for the Millennium Development Goals'*

⁶⁴ Rio+20 *The Future We Want: Framework for action and follow up*, 2012; UN General Assembly (2012)

⁶⁵ Identification and measurement of non-income dimensions of poverty is covered by the Multidimensional Poverty Index developed by the University of Oxford and UNDP <http://hdr.undp.org/en/statistics/mpi/>

⁶⁶ For example, tourism was a main factor in the graduation of Botswana and the Maldives from the status of LDC.

⁶⁷ IFAD (2010) *Rural Poverty Report*, 2011

- It provides a wide range of opportunities for work, both unskilled and skilled, that are well suited to women and young people.
- It can provide opportunities for minority communities and support their culture.
- It creates opportunities for many small and micro enterprises, with start-up costs and barriers to entry which can be low.
- The infrastructure provided by and for tourism, such as roads, water supply and sanitation can also be of great benefit to poor communities.
- By the market coming to the product, which is a special aspect of tourism, it provides a unique opportunity for social and economic contact of all kinds.

The potential for tourism to reduce poverty depends partly on the overall growth of the tourism sector in the country and its contribution to the economy as a whole. Alongside this is a need to influence the share of the tourism economy that reaches the poor, through a range of strategic and tactical approaches.

While tourism can bring positive opportunities for the poor and disadvantaged people, sometimes it can have negative impacts on social structures, traditions and local livelihoods. This may come about from increased competition for resources, local price rises and social changes leading to increases in crime, devaluing of traditions and other problems such as sexual exploitation arising from the behaviour of tourists and new influences on local communities.

The topics covered in the other Pillars are also very relevant. The policy framework provides the necessary context for tourism development and poverty alleviation; competitiveness and employment creation influence the growth of the sector and offer opportunities for disadvantaged groups; and sound environmental management is a prerequisite for sustainable livelihoods.

Four sub-pillars are identified for assessment

- **An integrated approach to poverty reduction through tourism**
The mainstreaming of poverty reduction in tourism policies and the development of a strategic approach at a local destination level.
- **Strengthening pro-poor tourism initiatives**
The successful application of different mechanisms for increasing income and benefits to the poor from tourism spending and investment.
- **The inclusion of disadvantaged groups in the tourism sector**
The approach taken towards engaging and benefiting women, young people, the elderly, ethnic minorities and disabled people in tourism.
- **The prevention of negative social impacts**
The safeguarding of local communities from threats to their traditional values, structures and wellbeing from unwanted change brought by tourism.

The first two sub-pillars are closely related. However, the first one is concerned with policies, assessment and analysis while the second focuses on specific initiatives and interventions.

4.1 An integrated approach to poverty reduction through tourism

In the past, initiatives to address poverty through tourism have tended to be focused on small, specific projects in a piecemeal fashion. However, it is increasingly recognised that a more holistic and integrated approach is needed.

Poverty reduction should be a central objective of tourism policies and strategies in all LDCs and developing countries. Equally, tourism should be highlighted in poverty reduction strategies and

development programmes. This should be reflected in a strong commitment from government, based on awareness of the potential and the possible approaches that can be taken. There should be a similar commitment from private sector enterprises as success will depend on their support and actions, which may be motivated by their corporate social responsibility and their desire to establish a positive relationship with their local community. The best results can be achieved when government and private sector stakeholders show joint commitment and work together on poverty reduction activities.

Some actions to assist in poverty reduction through tourism may be taken at a national level, such as research to improve understanding and knowledge and the development of support tools. The latter may include, for example, capacity building programmes or financial assistance mechanisms, such as microfinance schemes, designed to meet the needs of poor communities and the characteristics of the tourism sector.

While the development of policies and the design of relevant tools to support poverty reduction through tourism may be most appropriate at a national level, actions may be more effective if they are planned, coordinated and implemented at a local destination level⁶⁸. By focussing on particular localities tourism can play a strong role as an agent for improving local livelihoods.

Local destinations to prioritise should be those where there is a coincidence of need and realistic opportunity. The choice should be informed by considering:

- The nature and distribution of poverty in the country, including poverty levels in different areas and the types of community most affected.
- Current visitor patterns and levels of tourism across the country, including locations with potential for growth.

Certain types of local destination may exhibit both high levels of poverty and tourism potential. In many countries these may be rural areas or destinations containing protected areas. In others they may be coastal locations or major cities, which provide opportunities to involve the urban poor.

Strategies and actions for pro-poor tourism can be developed generically for different types of destination or product, such as for rural tourism, or individually for specific destinations at the local level.

Within the local destination, strategies should be informed by a detailed consideration of products and markets, identifying where the greatest potential may lie to increase the amount of income and benefit for the poor. Actions can, for example, help local people to obtain employment in the tourism sector, to provide goods and services to tourists and tourism enterprises, or to manage micro and small tourism enterprises.

Value chain analysis (VCA) is a useful technique for guiding pro-poor interventions. It involves breaking down the total visitor spending in a destination between different facilities and services, such as accommodation, food, souvenir purchase etc., and for each type of expenditure estimating the proportion that may reach the poor. From this it is possible to see more clearly where the poor are contributing and gaining most and where they are missing out, so showing where actions may be best directed. More information on this is provided in Annex 4.

There are a number of different ways in which the poor can receive income and benefits from tourism. The UNWTO has identified **seven mechanisms**⁶⁹ each of which may present opportunities, individually or in

⁶⁸ A comprehensive approach at this local destination level is set out in *Manual on Tourism and Poverty Alleviation: Practical Steps for Destinations* UNWTO and SNV, 2010b

⁶⁹ UNWTO (2004a) *Tourism and Poverty Alleviation: Recommendations for Action*

combination, depending on local circumstances. These mechanisms have formed the framework of their ST-EP⁷⁰ Initiative. The mechanisms include:

1. Employment of the poor in tourism enterprises
2. Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor
3. Direct sales of goods and services to visitors by the poor (informal economy)
4. Establishment and running of tourism enterprises by the poor - e.g. micro, small and medium sized enterprises or community based enterprises (formal economy)
5. Tax or levy on tourism income or profits with proceeds benefiting the poor
6. Voluntary giving/support by tourism enterprises and tourists
7. Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors.

Issue 1

Level of commitment to pro-poor tourism

Questions to assess the issue and identify weaknesses/needs

(a) Is tourism included in National Strategy Papers or in Poverty Reduction Strategy Papers (PRSP) as a vehicle for poverty reduction?

The need for tourism to be highlighted in overall development policies and papers was covered under Pillar 1. However, it is especially important in relation to poverty reduction and should be checked specifically with respect to the PRSP or equivalent document and National Strategy Papers.

(b) Is poverty reduction an objective of tourism policy, linked to specific actions and measurable outcomes?

Most LDCs and developing countries would be expected to identify poverty reduction as an objective of tourism development. However, a more serious commitment would be demonstrated by the articulation of strategies and actions to implement the policy and, in particular, in the use of indicators and setting of poverty reduction targets.

(c) What is the level of awareness of pro-poor issues and approaches in tourism?

This may be apparent from consultation with tourism officials and stakeholders. Some countries may have held workshops and training sessions specifically on this subject.

(d) To what extent is the private sector committed to pro-poor tourism and working with local communities?

Tourism associations and trade bodies may have expressed such a commitment in their statutes and purposes or this may be apparent from their actions. In most developing countries there are examples of individual tourism businesses that have made a considerable effort to work with members of the local community, sometimes covering all of the seven mechanisms listed above. Most sustainability awards and certification schemes include benefits to the community amongst their requirements and this is contained within the Global Sustainable Tourism Criteria⁷¹. An issue is the prevalence of this attitude across the sector.

⁷⁰ Sustainable Tourism – Elimination of Poverty. An initiative that has supported over 100 projects between 2005 and 2012 in more than 35 countries.

⁷¹ By the Global Sustainable Tourism Council, supported by UNWTO, UNEP and other bodies www.gstcouncil.org

Possible actions to address the issue and improve the situation

- Strengthen the specific attention given to poverty reduction and related actions in tourism policies and overall national development plans, and the attention given to tourism in poverty reduction strategies and development programmes
- Hold awareness sessions and training events on tourism and poverty reduction
- Encourage the private sector to formally commit to poverty reduction and working with local communities.

Existing Services relevant to the issue that can support possible actions:

- 1.01 *Tourism Development Master Plans and Strategic Development Plans*
- 1.02 *Country Tourism Policy*
- 1.08 *Tourism Positioning in Development Planning and Strategies*
- 4.03 *National Sustainable Tourism – Eliminating Poverty (ST-EP) Training Seminars*

Issue 2

Adopting a strategic approach to poverty reduction through tourism at national and local destination levels

Questions to assess the issue and identify weaknesses/needs

(a) Has there been any action at a national level to strengthen the approach to pro-poor tourism?

Most actions to develop and promote tourism could be deemed to some extent to benefit poverty reduction simply by growing the economy. This question is concerned with more specific actions to support pro-poor tourism and facilitate the engagement of the poor. These might include research studies, specific development projects and programmes, marketing of relevant products, guidelines and capacity building schemes, financial assistance, granting of concessions, legislation and regulations.

(b) Is there a strategy for rural tourism development, or for other types of destination with a pro-poor focus?

The needs and opportunities in rural areas may be similar across a number of destinations. Some countries have specific rural tourism strategies which provide guidance and set out actions at a national and local level. This could also apply to other types of area, such as working with poor coastal communities.

(c) Has there been any consideration or identification of priority destinations for pro-poor tourism initiatives?

This may have occurred through a systematic and detailed process, using a range of data related to tourism potential and poverty levels, or be based on a more subjective judgement, perhaps influenced by external programmes and funding opportunities.

(d) Have any particular local destinations established pro-poor tourism strategies and/or initiatives?

In some countries, individual destinations may already be taking a lead and it is important to be aware of what is happening.

(e) Has an assessment been made to estimate what proportion of tourism spending reaches the poor and in what ways?

Value Chain Analysis or similar processes may have been carried out nationally or locally in individual destinations. This may have been a comprehensive exercise such as that outlined in Annex 4 or a more limited estimation.

Possible actions to address the issue and improve the situation

- Identify actions at a national level to strengthen the pro-poor approach
- Formulate rural tourism strategies
- Identify priority destinations to pursue specific pro-poor tourism actions, in consultation with local stakeholders
- Conduct Value Chain Analysis in priority destinations
- Prepare a strategic action plan for pro-poor tourism development and interventions in one or more priority destinations.

Existing Services relevant to the issue that can support possible actions:

1.01 *Tourism Development Master Plans and Strategic Development Plans* 4.01 *Facilitating Pro-poor Growth in Tourism Destinations*

4.03 *National Sustainable Tourism – Eliminating Poverty (ST-EP) Training Seminars*

4.04 *Value Chain Analysis and Local Economic Development*

4.05 *Rural Tourism Strategies*

Tourism Value Chain Analysis in Cape Verde

A simple value chain analysis was undertaken in Cape Verde in 2008 as part of a larger study examining many aspects of tourism to inform recommendations on a programme of interventions to improve its developmental impact, including its contribution to poverty reduction. The first step involved mapping the big picture of enterprises and other actors in the tourism sector and the links between them. This was followed by surveys and consultation to identify where the poor are and are not participating. Finally, expenditure flows through the chain were estimated, including how much accrues to the poor, while also considering factors that may inhibit or enable their earnings.

The analysis identified that around 18% of total annual tourist expenditure reached the poor, through four main pathways which should be the subject of further investigation and potential strengthening. These included:

- Direct jobs in the tourism sector, requiring a policy to improve skills of local poor people to maximise their potential to participate fully.
- Indirect links with the construction sector, which employs high proportions from poor backgrounds, requiring development of career progression in this sector
- Indirect links with the agricultural sector, requiring identification of more produce that can be cultivated locally in Cape Verde
- Taxation, through progressive policies related to poverty reduction, requiring a review of the impact of fiscal policies and incentives.

4.2 Strengthening pro-poor tourism initiatives

A range of initiatives and interventions can be pursued within destinations to develop and extend the engagement of the poor in tourism and the flow of income and benefits to them. The seven mechanisms described earlier provide a framework for considering tactical options.

The choice and successful implementation of the mechanisms will be affected by the structure of the existing tourism sector in the destination and its relationship with poor communities. The active engagement of communities in tourism planning and development in their areas, as covered in Pillar 1 under Governance, is important for success. Understanding traditional industries and knowledge and also family and lifestyle models within communities is a necessary step in identifying effective linkages to tourism.

A key requirement is to develop and improve the conditions that enable poor people to relate efficiently and effectively with tourism business and tourists within a trading environment. This is about building linkages, improving the quality and relevance of services provided and strengthening access to markets. Poor communities need to provide resources and services which meet the needs of established businesses or are complementary to them, so all can benefit. To achieve this, the private sector needs to engage with and assist the process. This is relevant to most of the mechanisms, as indicated below.

The key mechanism of providing **employment** within tourism enterprises has been largely covered under Pillar 3. The particular challenges to address in strengthening opportunities for poor communities to obtain employment in tourism businesses include: making sure that they have access to general education and specific, relevant tourism training; ensuring that they are aware of employment opportunities and adopting appropriate recruitment procedures; providing jobs in accessible locations and facilitating transport to work; and structuring jobs and conditions of employment to meet their livelihood needs.

Providing goods and services to hotels and other enterprises through **supply chains** can be a valuable way of spreading opportunities within poor communities. Particular opportunities may come from the supply of food but also other goods and services. Interventions to strengthen linkages need to cover a range of issues, perhaps best tackled through an integrated programme, including:

- Investigating potential sources of supply and improving information
- Generally building trust and positive relationships between suppliers and users
- Helping poor communities understand the needs of tourism enterprises
- Working with producers to improve quality, quantity and reliability of supply
- Forming networks and cooperatives between suppliers.

Informal selling of goods and services directly to tourists, such as street selling of handicrafts, informal guiding etc., can prove to be one of the main ways for poor families to gain tourism income. However, it can be an inefficient and hazardous process. Benefits can be gained by initiatives to regulate and organise the sellers, improve quality and strengthen links to established businesses.

The establishment of **businesses** within poor communities, either as individual small enterprises or as community-based tourism initiatives, can provide direct and indirect benefits and potentially opportunities for up-scaling. However, it is essential that this takes place in the right business environment, requiring:

- Prior assessment of feasibility and realistic business planning
- Good access to markets and effective promotion
- Access to helpful capacity building and training
- Access to appropriate funding, possibly through microfinance tailored to tourism
- Regulations and standards that are achievable by small enterprises.

Joint ventures between established private sector businesses and community initiatives can prove to be a particularly successful approach.

Direct and indirect engagement in tourism can strengthen the capacity of poor communities to achieve sustainable development in all spheres, through exposure to new ideas and cultures and gaining experience in practical skills such as in ITC and business management.

Mechanisms that involve the creation of employment and enterprise may deliver benefits primarily to individuals and families. However, the final three mechanisms, involving **charges, voluntary giving and collateral benefits** can be directed at wider community needs and support specific social programmes, such as water supply, education and health care. It is important to establish whether such opportunities are being pursued and used effectively.

In some countries and destinations, successful pro-poor tourism initiatives may already exist, which have helped enhance the local economic impact from tourism. New actions may focus on up-scaling successful initiatives or replicating them in another context or destination.

Issue 1**Increasing income to poor communities from tourism businesses and trading*****Questions to assess the issue and identify weaknesses/needs******(a) Have initiatives been taken to promote employment in tourism to poor communities?***

Employment creation and promotion activity, including the provision of vocational training and development of necessary skills, is assessed under Pillar 3. This question seeks to identify the extent to which this may have been specifically directed at poor communities and shaped to their needs.

(b) How strong are the links between the tourism and agriculture (including fisheries) sector?

Cross-sectoral linkages at a Ministerial level, between support systems and within industry structures, can provide a good basis for developing mutually supportive pro-poor initiatives.

(c) How well developed are tourism supply chain linkages with poor communities at a local level?

Counties may vary in the general level of attention that the tourism sector gives to the supply chain. In some countries there may be a tradition of local sourcing which may not exist in others. This will partly depend on local conditions and the availability of produce. This question should address other services as well as agriculture.

(d) Are there significant amounts of informal trading by the poor in tourist areas and has this been the subject of any management?

The level of direct selling to tourists may vary, as may the extent to which this is seen as either a problem or an opportunity that should be addressed.

(e) Are poor communities engaged in providing tourism facilities and visits and is there potential to strengthen or expand this?

The provision of accommodation, catering, visitor attractions, guiding, events and village visits, including engagement with tangible and intangible heritage, are examples of the kinds of small tourism enterprises that may be provided in poor communities. Sometimes such enterprises are actively supported and promoted and they may be networked.

(f) Are structures in place to provide advice and assistance to poor communities on tourism business development, operation and promotion?

This refers to schemes for small or community-based enterprises that may be provided or backed by government, NGOs or specific programmes at a national or local level. The existence and expansion of public-private partnerships and joint ventures between communities and private businesses could also be assessed. This should also include other business structures including cooperatives and social enterprises.

(g) Is funding available for small tourism businesses through microfinance or other schemes?

In some countries poor communities have problems in raising funding, owing to their ability to offer security and meet financial terms. Sometimes tourism is not properly recognised by institutions as an activity for lending. This question relates to the availability of accessible funding in general as well as to the provision of tailored funding schemes.

Possible actions to address the issue and improve the situation

- Integrate poverty reduction into policies and actions on the promotion of employment
- Strengthen links between the tourism and agriculture sectors
- Review supply chain linkages at a destination level and support schemes to strengthen engagement of poor communities in them, including supply of agricultural produce, fish and other products and services
- Consider initiatives to manage and improve benefits from informal trading in tourist areas
- Strengthen the advice and assistance available for small tourism enterprises and community based tourism projects involving poor communities, including help with business planning, feasibility assessment and access to markets.

Existing Services relevant to the issue that can support possible actions:

- 4.01 *Facilitating Pro-poor Growth in Tourism Destinations*
- 4.02 *Sustainable Tourism – Eliminating Poverty Initiative (ST-EP)*
- 4.03 *National Sustainable Tourism – Eliminating Poverty (ST-EP) Training Seminars*
- 4.06 *Facilitating Tourism Development at Grass Roots Level*
- 4.07 *Pro-poor Business Linkages in Tourism*
- 4.08 *Tourism Small and Medium Enterprise Development*

Connecting local products and services to a hotel operation, Honduras

The UNESCO World Heritage Site of Copán Ruinas in Honduras is a major tourist attraction in Central America, receiving around 150,000 visitors per year. In 2011 the UNWTO, with SNV and the SE-EP Foundation completed a project to gain more benefit for poor local communities from tourism in the area. The objective of the project was to develop the tourism supply chain in the destination by connecting the Hotel Marina Copán as well as other tourism establishments in the area to a range of microbusinesses. The sustainable tourism practices of the hotel were evaluated in order to prepare a list of products and services that could be developed by these local providers. Extensive training courses were delivered to enhance the quality of the products and the entrepreneurial skills of 15 microbusinesses that had been selected to participate.

These activities resulted in the creation of the cooperative Copán Progresá for the management of loans and seed capital provided through the project. Advertising materials were produced for those microbusinesses which specialised in excursions, gastronomy, jewellery, sculpture and ceramics. The project resulted in benefits for over 300 people and doubled the turnover and amount of employment in the participating businesses between 2008 and 2010. The project also collaborated with the UN Programme on 'Creativity and Cultural Identity for Local Development' in publishing a guide for improved participation by creative and cultural microbusinesses in local fairs and exhibitions.

Pillar 4

Issue 2

Securing wider community benefits from tourism

Questions to assess the issue and identify weaknesses/needs

(a) Are poor communities benefiting from taxation and charges on tourism enterprises and visitors and could this be expanded?

The application and use of taxes and charges vary considerably between countries. The amount of exchequer revenue attributable to tourism and its use in general on poverty reduction may be hard to estimate. More specific examples of local charges on tourists and businesses that are used to support local communities, such as admissions or concessions in national parks, may be easier to identify.

(b) Is the industry engaged in voluntary giving to assist poor communities?

In the main this will be a matter for individual businesses, including service providers and tour operators, but sometimes may be coordinated and promoted.

(c) Does the planning of new tourism infrastructure take account of impact on poor communities?

Some countries require larger tourism development projects to undertake impact assessment that includes social as well as environmental aspects. Opportunities to benefit local communities may be a factor in decisions on the location and type of investment and could be reflected in conditions placed on schemes. It may be possible to obtain some indication of whether this is a widespread approach.

Possible actions to address the issue and improve the situation

- Review the use of revenue from any tourist taxes, admissions, concessions and other charges and its use for poverty alleviation
- Encourage voluntary support for local community projects within the tourism sector
- Require all significant tourism development projects to assess their impact on poor communities and seek to maximise collateral benefits to them.

Existing Services relevant to the issue that can support possible actions

- 1.01 *Tourism Development Master Plans and Strategic Development Plans*
- 4.02 *Sustainable Tourism – Eliminating Poverty Initiative (ST-EP)*
- 4.03 *National Sustainable Tourism – Eliminating Poverty (ST-EP) Training Seminars*
- 4.07 *Pro-poor Business Linkages in Tourism*

4.3 The inclusion of disadvantaged groups in the tourism sector

The opportunities that the tourism sector provides for the poor as a source of income and other benefits can equally be applied to other groups of people who may be disadvantaged. Five sizeable groups that are frequently found to be economically and socially marginalised are women, young people, the elderly, disabled people and ethnic minorities.

Because of the great variety of direct and indirect jobs associated with tourism, opportunities to include disadvantaged groups are considerable. However, this requires specific policies and positive action, in order to:

- Ensure that these groups are not discriminated against in any way; and
- Actively remove barriers and promote opportunities to facilitate their full participation in the sector.

Women are still marginalised from income generating activities in many developing countries. According to a UNWTO study, very few governmental tourism authorities address gender related issues directly in their activities⁷². A subsequent study on the participation of women in the tourism sector found that 'the key risks involved are that women are overrepresented in low-status jobs, often treated unequally or placed in stereotypical occupations, and vulnerable to sexual discrimination and exploitation'⁷³. The study makes a number of recommendations covering:

- Employment – by increasing awareness of the role of women in the sector, strengthening legal protection (minimum wage, equal pay) and improving working conditions (maternity leave, flexible hours, work-from-home options, and arrangements for childcare)

⁷² Peeters (2009)

⁷³ UNWTO and UN Women(2011) *Global Report on Women in Tourism 2010*

- Entrepreneurship – by facilitating access to credit, land and property as well as providing appropriate training and resources to support women's enterprises
- Education – by promoting education and training to improve the educational level of women
- Leadership – by supporting women's tourism leadership at all levels: public sector, private sector, and community management by establishing leadership programmes
- Contribution to community development – by recognising women's unpaid work and by monitoring tourism activities carried out in the home and in the community.

Young people make up 30% of the total working-age population and in developing countries the percentage can be substantially higher. Young people are more likely to suffer unemployment, be open to exploitation, take on casual work and low-quality jobs and command low wages. As a sector with low barriers to entry tourism can provide young people with good opportunities for employment and entrepreneurship. Part time and seasonal work can fit in well with the need for studying and training, but should still be subject to proper remuneration and social security. Vocational training and skills development are particularly important for this group.

Elderly people may be marginalised because they are seen as nearing the end of their productive life and could be considered to be more likely to suffer health problems. However their experience can be of great benefit to the sector. Issues relate to decent work provision, including levels of remuneration, social provision and job security up to retirement age.

Disabled people are particularly likely to suffer from discrimination which may be direct or as a consequence for failing to provide for their special needs in terms of access and other support. Tourism enterprises should be required to make such provision, which should be covered by regulation and inclusion in management standards. Equal attention should be paid to the needs of disabled employees and disabled visitors.

The treatment of ethnic minorities varies considerably across developing countries. All forms of discrimination against them should be outlawed. Cultural tourism development should be equally sensitive to the needs and opportunities presented by the heritage of majority and minority cultures. Ethnic minorities should be given a clear stake in the planning and organization of tourism activities around their cultural heritage.

The way the tourism sector ensures the economic and social inclusion of each of these groups should be informed by the approach outlined for women above and for poor communities earlier in this section. This includes taking active steps to meet their employment and educational needs and to support them in enterprise formation and operation, directly and through supply chains.

Issue 1

Effort to engage disadvantaged groups in tourism

Questions to assess the issue and identify weaknesses/needs

(a) Is recognition given to the needs of disadvantaged groups in tourism policies and strategies?

Tourism policies should include a commitment to the principle of social inclusion and actively providing opportunities for all people. Specific reference should be made to gender issues and to the needs of disabled people and other disadvantaged groups.

(b) Are the rights and needs of disadvantaged groups covered in legislation?

The legal framework that applies to tourism, such as labour laws, should cover all aspects of discrimination and exploitation. Where necessary, this should be made explicit in tourism legislation.

(c) How well integrated are women in the tourism sector and have steps been taken to improve their position and opportunities for them?

Information on this may be available from employment records but the situation may not have been looked at objectively. Views and anecdotal evidence should be available from the industry. Relevant actions may have been recorded. It may be necessary to study this more systematically as a future action. These comments also apply to the following four questions as well.

(d) How well integrated are young people in the tourism sector and have steps been taken to improve their position and opportunities for them?

As above

(e) How well integrated are the elderly in the tourism sector and have steps been taken to improve their position and opportunities for them?

As above

(f) How well integrated are disabled people in the tourism sector and have steps been taken to improve their position and opportunities for them?

As above

(g) How well integrated are ethnic minorities in the tourism sector and have steps been taken to improve their position and opportunities for them?

As above

Possible actions to address the issue and improve the situation

- Strengthen policies that commit to social inclusion in the tourism sector and refer specifically to gender issues and other disadvantaged groups
- Ensure tourism is fully covered by legislation against discrimination and exploitation
- Review the level of inclusion of women, young people, the elderly, disabled people and ethnic minorities in the sector
- Require tourism facilities and activities to be accessible to all as employees and users
- Pursue and support actions to strengthen and expand opportunities for disadvantaged groups in tourism.

Existing Services relevant to the issue that can support possible actions:

- 1.01 *Tourism Development Master Plans and Strategic Development Plans*
- 1.02 *Country Tourism Policy*
- 1.03 *Tourism Legislation and Regulation*
- 3.05 *Strengthening the Role of Women in Tourism*
- 4.09 *Tourism and Hospitality Training Programmes for Disadvantaged Youth*

Working with women's groups in Mali

A UNWTO ST-EP project in Mali has worked with a group of women in the Djenné area who are involved in the production of handicrafts for tourists as a home-based activity and a source of income. Their main craft activity is the creation of bracelets from recovered plastic materials. The project, which was run jointly with the Ministry of Handicrafts and Tourism, the Regional Health Bureau and the Regional Social Development Bureau, has paid particular attention to the health and welfare of the female craft workers, addressing their working conditions and strengthening their earning capacity.

A census was carried out for the project and 64 craftswomen were listed for assistance. The project enabled them to organise themselves in a formally constituted cooperative and to strengthen the management and marketing skills of the members. A particular issue was the health hazard from the toxic fumes from melting plastic in the family living space, which was seriously affecting the women and their children. This was addressed through education, providing better tools and safety equipment and establishing a new working environment. As a result the women are receiving increased income from tourism and have substantially improved their overall health.

4.4 The prevention of negative social impacts

Policies and actions to alleviate poverty through tourism and to ensure social inclusion should not just be concerned with providing opportunities for the poor and disadvantaged groups. It is also important to make sure that tourism development and activity does not adversely affect the wellbeing and livelihood of the communities where it occurs.

A first area of concern is whether tourism development and operations may affect the availability of essential resources for the community and their access to them. Access to land or to key locations such as the coast, for economic, amenity and cultural purposes, is an important requirement, and often a right, that must be respected.

Particular attention should be paid to the availability and use of clean water, which is an increasingly scarce resource in the face of growing demand and global warming. Access to clean water is a basic human right, which must be respected by business, including the tourism sector⁷⁴. Use of water by hotels and resorts can be extensive and can affect its availability for local communities.

A second area of concern relates to the impact of tourism on the social fabric and functioning of local communities. This may result from changes brought about by an influx of visitors and economic change leading to a breakdown of traditional values, price rises, economic disparity and potentially to social disharmony, rising crime, health issues and sexual exploitation. These problems may be more apparent where the scale and pace of change is greatest.

Policies and actions to prevent and address such negative impacts should be in place. In part, this is about awareness and commitment. The UN backed Global Code of Ethics for Tourism provides a basis for making such commitment and adherence to it has been considered under Sub-Pillar 1.2. Other codes exist that address specific issues. The 'Code of Conduct for the Protection of Children from Commercial Exploitation in Travel and Tourism', initiated by ECPAT International⁷⁵ and UNWTO, has been widely supported by many countries and corporate bodies.

⁷⁴ IHRB (2011) *More Than a Resource: Water, Business and Human Rights*.

⁷⁵ End Child Prostitution, Child Pornography and Trafficking of Children for Sexual Purposes

Prevention of these conflicts should also be achieved through careful planning of new development and adherence by tourism businesses to the principles and practice of sustainable tourism in their operations. This is further addressed under Sub-Pillar 5.3 which considers environmental and cultural impact. A vital dimension to this is consultation with local communities and involvement of them in the planning process and in decisions on tourism development and operation in their areas, together with keeping abreast of impacts and changes over time from their perspective.

Issue 1

Effort to identify and address negative social impacts

Questions to assess the issue and identify weaknesses/needs

(a) Are local communities consulted about the development and operation of tourism in their areas?

It is important to understand whether there is a legal requirement for such consultation and whether this is enforced. Also, whether there is guidance and a mechanism for consultation and the extent to which consultation actually occurs in practice.

(b) Are local communities engaged and empowered in decisions about the development and operation of tourism in their areas?

The involvement of local communities should go deeper than consultation, including appropriate engagement and empowerment in decision taking.

(c) Are the views of local communities on the impact of tourism on their livelihoods sought and monitored?

Systematic surveys of the reaction of communities to tourism over time tend to be quite rare both in developed and developing countries. However, it is important that there is sensitivity to impacts and change and a process for views and concerns to be heard and addressed.

(d) Is attention paid to access to resources, including land, for local communities, in planning and managing tourism?

This should be a feature of planning work and of impact assessment requirements relating to new projects. The management of tourism operations should also minimise competition for resources, including land, with local communities.

(e) To what extent are their believed to be issues of negative impact on resources for local communities as a result of tourism development?

This may be hard to evaluate and is likely to vary considerably across the country and between projects, but it is instructive to try to gauge the level of awareness of the issue and the extent to which it is a problem.

(f) Is there evidence of a rise in crime and other social problems, including sexual exploitation, from tourism and is action being taken?

Again, this may be hard to assess but it may be possible to identify the level of awareness of tourism related crime and other social issues and whether there are problems and if any action is being taken.

(g) Is the country a signatory to the ECPAT Code and is this being followed up?

This is a particular indicator that can be specifically answered.

(h) How aware and alert is the private sector to negative social impacts of tourism?

Consultation with private sector representatives and with other stakeholders should reveal whether these issues are being considered and discussed within the sector.

Possible actions to address the issue and improve the situation

- Review requirements for consulting with, engaging and empowering local communities in tourism plans and decisions
- Provide capacity building for local communities to assist them to engage effectively in tourism planning and management
- Improve access to legal services for communities in securing their rights of engagement
- Strengthen regulations and guidance on project impact assessment to cover social impacts
- Commit to Global Code of Ethics for Tourism and the ECPAT Code and report on compliance actions
- Hold awareness-raising events and workshops on social impact issues, with participation of tourism businesses and relevant NGOs

Existing Services relevant to the issue that can support possible actions:

- 1.01 *Tourism Development Master Plans and Strategic Development Plans*
- 1.03 *Tourism Legislation and Regulation*
- 1.05 *Tourism Physical Planning and Resort Development*
- 1.08 *Tourism Positioning in Development Planning and Strategies*
- 1.09 *Capacity Building Programmes in Tourism Development and Management*
- 1.13 *Destination Management Planning*
- 4.10 *Child Protection in Tourism*
- 5.17 *Strengthening of Sustainable Tourism Governance*

Collaborative action in Costa Rica to combat sex tourism

Costa Rica has become a highly popular tourist destination based on its high quality natural resources. However, it has also been targeted by websites promoting sex tourism and this has become a significant problem. A legal basis for tackling this in Costa Rica existed but this proved ineffective in delivering compliance. The country is a signatory of the UNWTO Global Code of Ethics, which outlaws the exploitation of human beings, and of the ECPAT Code and these have been used as a basis for a proactive campaign.

Civil society played a key role in instigating action. Implementation of the ECPAT code was led by Fundación Paniamor, a longstanding local human rights NGO, with financial input from four other international NGOs. Action was taken via a partnership approach with the private sector, through the tourism chambers and the hotels and tour operator associations who all also signed the ECPAT code. This has committed all individual business members to five steps, including a zero-tolerance policy, sensitising personnel, displaying information, influencing suppliers and reporting annually on steps taken to meet the requirements of the code. The whole approach is supported by national policy and promotion through government tourism bodies. Results include a very high awareness and observation of the Code throughout the sector and a higher percentage of cases leading to successful prosecution.

QUESTIONNAIRE: PILLAR 4 - POVERTY REDUCTION AND SOCIAL INCLUSION

To facilitate a quick assimilation of the situation, the columns after the questions provide the opportunity to allocate a score, if applicable. This is based on the following scale:

1	Area of particular need/opportunity – highest priority for action/intervention		Priority for action
2	Improvement required – should also be considered for intervention/support		High
3	May benefit from some improvement – but less current need for intervention		↓
4	Appears to be satisfactory – maintain		Low
5	Area of apparent strength – may provide an example to others		Priority for action
X	No information available to answer the question /This could not be assessed		

4.1 An integrated approach to poverty reduction through tourism

Issue 1: Level of commitment to pro-poor tourism

	QUESTION	COMMENT	Priority for action							
			High	→	Low	1	2	3	4	5
a	Is tourism included in National Strategy Papers or in Poverty Reduction Strategy Papers (PRSP) as a vehicle for poverty reduction?									
b	Is poverty reduction an objective of tourism policy, linked to specific actions and measurable outcomes?									
c	What is the level of awareness of pro-poor issues and approaches in tourism?									
d	To what extent is the private sector committed to pro-poor tourism and working with local communities?									

Issue 2: Adopting a strategic approach to poverty reduction through tourism at national and destination level

a	Has there been any action at a national level to strengthen the approach to pro-poor tourism?								
b	Is there a strategy for rural tourism development, or for other types of destination with a pro-poor focus?								
c	Has there been any consideration or identification of priority destinations for pro-poor tourism initiatives?								
d	Have any particular destinations established pro-poor tourism strategies and/or initiatives?								
e	Has an assessment been made to estimate what proportion of tourism spending reaches the poor and in what ways?								

4.2 Strengthening pro-poor tourism initiatives

Issue 1: Increasing income to poor communities from tourism businesses and trading

a	Have initiatives been taken to promote employment in tourism to poor communities?								
b	How strong are the links between the tourism and agriculture (including fisheries) sector?								
c	How well developed are tourism supply chain linkages with poor communities at a local level?								
d	Are there significant amounts of informal trading by the poor in tourist areas and has this been the subject of any management?								
e	Are poor communities engaged in providing tourism facilities and visits and is there potential to strengthen or expand this?								
f	Are structures in place to provide advice and assistance to poor communities on tourism business development, operation and promotion?								
g	Is funding available for small tourism businesses through microfinance or other schemes?								

	QUESTION	COMMENT	Priority for action					
			High	→	2	3	4	
Issue 2: Securing wider community benefits from tourism								
a	Are poor communities benefiting from taxation and charges on tourism enterprises and visitors and could this be expanded?							
b	Is the industry engaged in voluntary giving to assist poor communities?							
c	Does the planning of new tourism infrastructure take account of impact on poor communities?							
4.3 The inclusion of disadvantaged groups in the tourism sector								
Issue 1: Effort to engage disadvantaged groups in tourism								
a	Is recognition given to the needs of disadvantaged groups in tourism policies and strategies?							
b	Are the rights and needs of disadvantaged groups covered in legislation?							
c	How well integrate are women in the tourism sector and have steps been taken to improve their position and opportunities for them?							
d	How well integrate are young people in the tourism sector and have steps been taken to improve their position and opportunities for them?							
e	How well integrate are the elderly in the tourism sector and have steps been taken to improve their position and opportunities for them?							
f	How well integrate are disabled people in the tourism sector and have steps been taken to improve their position and opportunities for them?							
g	How well integrate are ethnic minorities in the tourism sector and have steps been taken to improve their position and opportunities for them?							
4.4 The prevention of negative social impacts								
Issue 1: Effort to identify and address negative social impacts								
a	Are local communities consulted about the development and operation of tourism in their areas?							
b	Are local communities engaged and empowered in decisions about the development and operation of tourism in their areas?							
c	Are the views of local communities on the impact of tourism on their livelihoods sought and monitored?							
d	Is attention paid to access to resources, including land, for local communities, in planning and managing tourism?							
e	To what extent are their believed to be issues of negative impact on resources for local communities as a result of tourism development?							
f	Is there evidence of a rise in crime and other social problems, including sexual exploitation, from tourism and is action being taken?							
g	Is the country a signatory to the ECPAT Code and is this being followed up?							
h	How aware and alert is the private sector to negative social impacts of tourism?							

PILLAR 5 Sustainability of the Natural and Cultural Environment

Tourism has a special relationship with the environment. There are three main and inter-related reasons why environmental sustainability, including the conservation of natural and cultural heritage, should take centre stage in tourism policies and strategies.

- First, a country's tourism sector and its natural and cultural assets are inextricably linked. Fine landscapes, rich biodiversity, unique heritage sites and vibrant indigenous cultures combine to provide the main reason why tourists visit most developing countries. The conservation of these assets is of paramount importance for tourism. At the same time, the tourism sector itself must make sure that its activities do not damage them but rather help to sustain them, through the awareness and income that it generates.
- Secondly, the depletion of renewable and non-renewable resources, such as fresh water and energy, and the generation of waste and pollution are major problems affecting both global and local environments and human wellbeing. The manner and rates at which these resources are used, and the associated pollution, affect the sustainability and competitiveness of tourist destinations. Tourism must reduce its own levels of consumption and waste to enhance the contribution that the sector makes to sustainable development, while also adjusting to a world where resources are scarcer.
- Thirdly, climate change, driven by greenhouse gas emissions, is recognised as a preeminent threat to the environment, society and economic development. The consequences for many developing countries are especially severe. The implications for tourism, in terms of reducing its contribution to emissions on the one hand and adapting to the effects of climate change on the other, must be fully recognised and addressed in the future planning, development and management of the sector.

The above challenges are embraced by the principles of sustainable tourism as a contributor to sustainable development and require that governments and other stakeholders develop and apply policies and management procedures and make choices which adhere to these principles. Of the 12 aims for sustainable tourism set out by UNEP and UNWTO, five relate to the natural and cultural environment (physical integrity, cultural richness, biological diversity, resource efficiency and environmental purity)⁷⁶. In 2012, the role of sustainable tourism was recognised in the Rio+20 Conference, which specifically underlined its positive contribution to environmental conservation and cultural diversity⁷⁷.

The main theme of Rio+20 was 'a green economy' in the context of sustainable development and poverty eradication. Prior to this summit UNEP published the Green Economy Report⁷⁸ in February 2011. This contained a chapter on tourism jointly prepared by UNWTO and UNEP as one of ten economic sectors that can make a major contribution to the transition to a green economy. The report sets out a 'green investment' model for future tourism growth. This shows how tourism can continue to deliver growth in GDP while achieving significant reductions in energy use, emissions, waste and water consumption. The model assumes a programme of investment in energy saving, water and waste management, staff training and biodiversity conservation, together with a change in travel patterns and transport use. The report sets out enabling conditions for achieving greater sustainability in the sector. It also identifies important drivers for change, including changes in consumer demand, business desire to reduce costs and increase competitiveness, technological improvements, more coherent policies and greater social and environmental responsibility on the part of businesses and tourists. These drivers and required actions set out in the Green Economy Report are reflected in this fifth pillar.

⁷⁶ UNWTO and UNEP (2005) *Making Tourism More Sustainable*

⁷⁷ Rio+20 *The Future We Want: Framework for action and follow-up*, 2012

⁷⁸ UNEP (2011) *Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication*

Four sub-pillars are identified for assessment:

- **Relating tourism to natural and cultural heritage**

The integration of tourism in the management and conservation of natural and cultural assets, including protected areas. It is also concerned with the development of ecotourism and cultural tourism products that benefit the environment and the wellbeing of local communities.

- **Focussing on climate change**

The need to address the challenges of climate change in tourism policies and strategies.

- **Enhancing sustainability of tourism development and operations**

The promotion of practical policies and actions within the industry to encourage and pursue sustainability in the development and operation of tourism facilities and services.

- **Measuring and monitoring tourism impacts**

The importance of understanding and quantifying the impact of tourism on the natural and cultural environment, through monitoring and the use of sustainability indicators.

5.1 Relating tourism to natural and cultural heritage

This section is concerned with the natural and cultural heritage of a country and how it is conserved, managed and used for tourism. UNESCO defines heritage as “our legacy from the past, what we live with today, and what we pass on to future generations” and attests that “our cultural and natural heritage are both irreplaceable sources of life and inspiration. They are our touchstones, our points of reference, our identity”⁷⁹. Cultural heritage refers to monuments, groups of buildings and sites with historical, aesthetic, archaeological, scientific, ethnological or anthropological value. Cultural heritage can also be intangible, including traditions or living expressions inherited from our ancestors and passed on to our descendants, Natural heritage refers to outstanding physical, biological and geological formations, habitats of threatened species of animals and plants and areas with scientific, conservation or aesthetic value.

Specific assets that are essentially natural in character may be separate from those that are essentially cultural, but in developing countries they are also often integrated and co-located. In many ways both natural and cultural heritage face similar sustainability issues in their relationship with tourism.

Investment in the conservation of natural and cultural heritage should be recognised as a sound strategy for sustainable development. This has been underlined in the Green Economy Report and in various other studies⁸⁰. Maintaining tourism provides part of the justification and also an economic return for such investment.

Developing countries are likely to have specific policies for the conservation and management of natural and cultural heritage. These policies and related actions should recognise the challenges and opportunities presented by tourism. Tourism policies and strategies should underline the importance of both the natural and cultural heritage to tourism⁸¹ and should contain specific sections relating to their conservation and sustainable use as a key tourism resource. Broad recognition of these important objectives and integration of policies and actions can be facilitated by ensuring a close working relationship between tourism ministries and those responsible for the environment and natural resources and for culture.

⁷⁹ UNESCO (2008) *World Heritage Information Kit*

⁸⁰ E.g. *The Economics of Ecosystems and Biodiversity*, UNEP – an ongoing initiative www.teebweb.org

⁸¹ Various studies have been undertaken on the relationship between tourism and different aspects of cultural and natural heritage, such as UNWTO (2010a) *Tourism and Biodiversity* and UNWTO and Ramsar Convention (2012) *Destination wetlands: supporting sustainable tourism*, UNWTO 2012.

Countries should be fully aware of all of their natural and cultural assets, which should all be afforded a degree of protection. Distinctive natural and cultural landscapes, such as the coastal zones, mountain ranges, rivers and lakes, major wildlife habitats, areas rich in traditional agricultural practices or tribal settlements, and historic towns and cities, all need careful planning and protection in general and with respect to tourism development. Particular focus, in terms of conservation and tourism, will be placed on protected areas, including national parks, archaeological sites and reserves. It is important that legislation and regulations covering these areas is sufficient to secure their protection from damaging development and other activities. Where necessary, the number and size of such protected areas should be increased, while also ensuring that they are managed effectively for conservation and tourism.

All parks, protected areas and natural and cultural heritage sites should have management plans which are actively implemented. These should include actions on visitor management, including rules and guidelines on access and the location and operation of visitor services, and the provision of good quality information and interpretation. They should also cover the pursuit of sustainable tourism opportunities. Plans and actions should be drawn up in close consultation with tourism stakeholders, including local businesses and tour operators, and with the local community⁸². Particular attention should be paid to the generation of income from tourism, through admission charges, letting concessions, voluntary gifting and other activities, and how this income is used for management and conservation, as well as to support local livelihoods.

Within and outside protected areas, the development of a wide range of tourism experiences linked to the enjoyment of nature, cultural sites and intangible heritage should be encouraged. These may be largely pursued by private sector businesses, but also provide good opportunities for public-private partnerships. Opportunities for local communities to engage in a variety of ways, including through well planned and executed community-based tourism experiences, should be pursued – see also Pillar 4 on Poverty Reduction. Creative use of ICT in interpretation should be employed where possible and appropriate.

All tourism activity that relates to natural and cultural heritage must comply with sound sustainability principles and standards in the way it is developed and operated. This applies to building location, design, use of materials, use of energy and water, waste management, sourcing of supplies and respecting cultural sensitivities. This is covered further in section 5.3 below.

While the principles and approach that apply to natural and to cultural heritage should be the same, the policies, structures and services are often separate, so two sets of questions are presented below.

Issue 1

Effective policies and actions to conserve and promote natural heritage

Questions to assess the issue and identify weaknesses/needs

(a) Does the country's tourism policy and strategy/master plan cover tourism issues related to natural heritage?

The principle requirement is for the country's tourism policy and strategy to fully recognise the need to conserve natural heritage and the opportunities it brings for tourism. Some countries have separate policies and plans for 'ecotourism' which are about the development of tourism in natural areas. These can be helpful. However, it is important that the relationship between tourism and natural heritage is not treated primarily as a separate issue related to niche products and markets, but rather is integrated

⁸² An example of an integrated approach to heritage site management and tourism is the World Heritage and Sustainable Tourism (WH+ST) Programme of UNESCO and its partners

in the overall development of sustainable tourism and closely linked to policies on environmental protection and conservation of natural resources.

(b) Do policies on natural resources cover the issues and opportunities related to tourism?

A country's natural resource policies should at least recognise the importance of the country's natural assets as a basis for tourism and the need to relate to the tourism sector.

(c) How well protected are the country's natural heritage assets, including the extent and effectiveness of protected areas?

Some countries have a strong framework of legislation and regulation protecting landscapes and biodiversity, with an extensive framework of protected areas. In other countries this is far weaker. Protected area managers, where such areas exist, should have the powers to control development and have sufficient resources to undertake and contribute to effective management and conservation.

(d) Is tourism being effectively planned and managed in national parks and other natural heritage areas and sites?

National parks and protected areas should have management and conservation plans which also cover visitor management and tourism. Plans should be drawn up in consultation with tourism stakeholders and local communities. They should provide clear guidance on tourism development and activity within and around the protected area. Protected area bodies and their partners should have sufficient resources and capacity (including tourism knowledge and skills) to implement actions. Action should include the generation and use of tourism income to support conservation and local livelihoods. Specific natural heritage areas and sites requiring better planning and management may be identified as priorities for future support.

(e) Is tourism included in specific policies and actions to plan and protect the coastal zone and marine environment?

Coastal areas have their own particular needs and sensitivities. They are also often focal areas for tourism development. Integrated coastal zone management⁸³ is often pursued through separate policies, plans and initiatives and it is important that the tourism sector is fully covered in this.

(f) Is there a well-established tourism product/offer related to natural heritage in the country?

A wide range of types of product can embrace aspects of natural heritage, including visits to wildlife parks with associated visitor centres, carefully located and managed accommodation, such as ecolodges, provision of trails, wildlife watching and nature tours, and sustainable diving operations. Such products and experiences can be actively supported, brought together and promoted, through government schemes and/or through private sector networks such as ecotourism bodies.

(g) Overall, is the country's natural heritage supported by tourism or threatened by it?

Although the right policies may be in place and effective action may be being taken in protected areas, tourism development and operations across the country may itself be posing a threat to natural heritage, and in particular biodiversity, if it is not properly controlled or managed. This is covered in section 5.3 below, but it would be helpful to obtain an overall impression of the balance of tourism's impact on natural heritage as a whole.

⁸³ Integrated Coastal Zone Management (ICZM) is a continuous, proactive and adaptive process of resource management for sustainable development in coastal areas. It is not a substitute for sectoral planning, but focuses on the links between sectoral activities to achieve more comprehensive goals. ICZM simultaneously takes into account the fragility of coastal ecosystems and landscapes, the diversity of activities and uses, their interactions, the maritime orientation of certain activities and uses and their impact on both the maritime and land elements.

Possible actions to address the issue and improve the situation

- Strengthen coverage of natural heritage in the country's tourism policy and strategy/master plan.
- Strengthen recognition of tourism as an economic activity requiring attention in policies relating to natural resources
- Increase the level of protection of natural heritage, including the coverage and powers of protected areas
- Ensure national parks and other areas of sensitive natural heritage have management plans that include tourism and involve local stakeholders
- Support tourism management plans for natural heritage areas or sites in particular need, as pilot and demonstration projects
- Review and improve capacity and skills in natural heritage management and interpretation for tourism, including in guiding and use of ICT
- Strengthen integrated coastal zone and marine area management, including tourism
- Raise the profile of nature related tourism products and offers
- Ensure all tourism development and operations minimises impact on natural heritage and biodiversity (see 5.3)

Existing Services relevant to the issue that can support possible actions:

1.02 *Country Tourism Policy*

5.03 *Biodiversity and Tourism: Development and Implementation of Local Participatory Tourism Management Plans for Sustainable Use and Conservation of Biodiversity*

5.04 *Development of Biodiversity-based Tourism Products*

5.05 *Training and Capacity Building on Tourism and Biodiversity*

5.08 *Capacity Building in Tourism Management of World Heritage Sites and other Sites*

5.16 *Ecotourism Policies and Strategies*

Conservation and sustainable tourism in the Yasuni Biosphere Reserve, Ecuador

The Yasuni Biosphere Reserve (YBR) covers some 9,000 km², primarily of rainforest, in the upper Amazon basin and is one of the world's most biologically diverse areas. This biodiversity is threatened by illegal logging and hunting as well as the area's potential for oil extraction. Between 2008 and 2012 a Joint Programme of the MDG Achievement Fund brought together various agencies, led by the Ministry of Environment of Ecuador and including UNESCO, UNIFEM, UN-HABITAT, FAO, UNWTO and UNDP, in a project on the Conservation and Sustainable management of the Natural and Cultural Heritage of the YBR. The project was aimed both at MDG 7 on Environmental Sustainability and MDG 1 on Poverty Eradication. A key part of the project was to strengthen alternative livelihoods for the local population, with tourism as one of the key opportunities. This involved work at a national, regional and local level on policies and management plans as well as practical initiatives. Elements included:

- Integrating the policies on natural and cultural heritage conservation and on environmental quality with the regional and local investment plans of the local authorities and social organisations in the YBR area.
- Formulating a sustainable tourism model for the Yasuni Reserve and National Park in a consultative and participative process with national stakeholders.
- Working with local communities and local authorities on the implementation of local initiatives on the conservation and sustainable management of biodiversity. This included establishing codes of conduct for tour operators, tourists and local communities, reflecting an agro-ecological, rights and gender related approach, jointly worked out with the national stakeholders.
- Implementing pilot projects based on sustainability principles.
- Launching sustainable tourism products appropriate to local and international markets.

Issue 2

Effective policies and actions to safeguard and promote cultural heritage

Questions to assess the issue and identify weaknesses/needs

(a) Does the country's tourism policy and strategy/master plan cover tourism issues related to cultural heritage?

It is important that cultural tourism issues and opportunities are reflected in country tourism policies and strategies. In some countries separate cultural tourism strategies may exist, but these should be closely linked together.

(b) Do policies on culture cover the issues and opportunities related to tourism?

A country's culture policies should include a clear recognition of the needs and opportunities presented by tourism.

(c) How well protected and conserved are the country's cultural heritage assets?

A country's cultural heritage is often quite broad and the level of protection afforded to it may not be very adequate. Evidence on the protection of tangible and intangible heritage may be found in culture strategies and legislation. The main cultural heritage sites should be protected. There should be sufficient resources for investment in the safeguarding of historic buildings and artefacts.

(d) Is tourism being effectively planned and managed at cultural heritage sites?

Visitor access and management, including the provision of information and interpretation, should be properly planned and implemented at all sites. Plans should include the development and operation of visitor facilities, including retailing, catering and accommodation on and close to the sites. Plans and actions should involve tourism stakeholders and local communities and include the generation and use of tourism income to support conservation and local livelihoods. Specific cultural heritage sites requiring better planning and management may be identified as priorities for future support.

(e) Is there a well-established tourism product/offer related to cultural heritage in the country?

In most countries, cultural heritage forms an integral part of a visitor's experience and it may be misleading to conceive of a separate cultural tourism offer. However, the range of opportunities to visit heritage sites and experience various forms of living culture, including music, arts, handicrafts, cuisine and local traditions, should be clearly established and presented. Encouragement should be given to the effective use of ICT in interpretation.

(f) Overall, is the country's cultural heritage supported by tourism or threatened by it?

Tourism is sometimes seen as a threat to culture, by putting pressure on cultural sites and resources and a tendency to modify the intrinsic value of the living heritage and traditions of an area. However, handled sensitively it can bring benefit by raising awareness and generating income, thereby helping to safeguard historic sites and intangible heritage. It may be possible to obtain some indication of where the balance lies between these positive and negative impacts.

Possible actions to address the issue and improve the situation

- Strengthen coverage of cultural heritage in the country's tourism policy and strategy/master plan.
- Strengthen recognition of tourism in policies relating to culture
- Increase the level of protection and conservation of tangible and intangible cultural heritage
- Ensure that cultural heritage sites have plans that cover tourism development and management and involve local stakeholders
- Support tourism management plans for cultural heritage sites in particular need, as pilot and demonstration projects
- Review and improve capacity and skills in heritage site management and interpretation for tourism, including in guiding and ICT
- Raise the profile of cultural tourism experiences in the country
- Ensure all tourism development and operations are sensitive to their impacts on cultural heritage (see 5.3)

Existing Services relevant to the issue that can support possible actions:

1.02 *Country Tourism Policy*

5.06 *Developing Policy Frameworks Integrating Culture into Development through Tourism*

5.07 *Capacity Building Programmes on Tourism Management at Heritage Sites*

5.08 *Capacity Building in Tourism Management of World Heritage Sites and other Sites.*

5.09 *Tourism Specialization: Cultural Tourism*

Cultural Tourism Programme, Tanzania

The tourism offer in Tanzania has traditionally focussed on wildlife and beach experiences. However, the country has a strong living cultural heritage, most evident in rural villages that have retained a traditional way of life and a rich variety of music, dance, folklore and handicrafts. The Cultural Tourism Programme provides an opportunity for tourists to access this culture through village visits, thereby encouraging its preservation and providing a source of income for rural communities. It was started in 1995 with three communities and has expended to over 25 throughout the northern part of Tanzania. Experiences available include guided village tours, cultural displays, culinary experiences, storytelling, handicraft demonstrations and sales, simply accommodation and other activities.

The programme received technical support initially from SNV and is now coordinated by the Tanzania Tourist Board who is also responsible for marketing. Existing communities and those joining the programme receive advice and capacity building on product development, customer handling, communication and management. Income is earned by individual households providing services and from a Village Development Fee, together with any voluntary donations, which supports local infrastructure and social services. Performance has varied considerably between the communities, depending on their location, quality of experience, management skills and effort in communication. A project supported by UNWTO has sought to address these issues and build on what has been achieved over a number of years.

5.2 Focussing on climate change

Climate change has huge consequences for the state of the world's environment, placing a strain on resources as well as directly threatening the wellbeing of local populations. It has been described as "the pre-eminent geopolitical and economic issue of the twenty first century. It rewrites the global equation for development, peace and prosperity"⁸⁴. The International Panel on Climate Change concluded that climate

⁸⁴ UN Secretary General - opening speech at Climate Change Summit, New York, 2009

change would "impede the ability of a number of nations to achieve sustainable development by mid-century"⁸⁵.

The imperative of mitigating climate change and adapting to its impacts must be recognised in tourism policies and strategies for the short and long term.

In recent years much debate and study has taken place on the implications of climate change for tourism. In 2007 the Davos Declaration called for "a clear commitment for action to respond to the climate change challenge, including the urgent adoption of a range of sustainable tourism policies."⁸⁶ Since then, UNWTO has been facilitating awareness raising and the gathering of knowledge on the subject.

Models and approaches for the future of the sector, such as in the Green Economy Report referred to earlier and work by the World Economic Forum⁸⁷, have pointed to tourism transport and the operation of accommodation as particular parts of the sector that need to reduce their emissions and their use of non-renewable energy.

It has been identified that climate change **mitigation** in tourism should focus on four main strategies⁸⁸:

- reducing energy use – including influencing travel patterns through length of journeys, length of stay and mode of transport
- improving energy efficiency – using new technology and improved practices in aviation, road transport and accommodation design and operations
- increasing the use of renewable energy – such as solar power for tourism enterprises
- sequestering carbon – including use of offsetting, although this should not be as an alternative to reducing emissions.

While some of these mitigation measures should be taken in the destination country, others (such as influence on travel and transport) may be taken in the source country or more widely but have an effect on the tourism performance of destinations. As a principle, UNWTO has argued for differentiated approaches to mitigation that reflect the needs of developing countries and especially SIDS and LDCs⁸⁹. However, it is important for all countries to consider the possible effects of global mitigation actions on their tourism economies in the short and long term.

Experience has shown that climate change **adaptation** actions for the tourism sector in each country can only be implemented effectively within an integrated policy framework⁹⁰. Actions may be instigated nationally but will often need to be implemented locally. They will vary according to the type of environment and local circumstances, but typically might cover:

- Land use policy and location of buildings, especially required distance from the shoreline
- Provision of infrastructure, such as sea defences, flood control etc.
- Product and market adaptation to changing weather patterns
- Stricter management of resources of all kinds
- Response strategies for natural disasters such as flooding.
- Adjustment to financial risks, including insurance provision.

⁸⁵ IPCC (2007) Fourth Assessment Report

⁸⁶ UNWTO (2009) *From Davos to Copenhagen and beyond: advancing tourism's response to climate change*

⁸⁷ World Economic Forum (2009) *Towards a Low Carbon Travel and Tourism Sector*.

⁸⁸ UNWTO, UNEP WMO (2008) *Climate Change and Tourism – responding to Global Challenges*

⁸⁹ For example in UNWTO(2010b) *Statement Regarding Mitigation of Greenhouse Gas Emissions from Air Passenger Transport*

⁹⁰ UNWTO, UNEP (2008) op. cit.

Issue 1**Sufficient attention to climate change in the tourism sector*****Questions to assess the issue and identify weaknesses/needs******(a) Is climate change and resource management fully addressed in the tourism policy and strategy/master plan?***

This topic should be clearly addressed in the overall tourism policy and plan. Some countries may have established separate or subsequent policies on climate change which should be reflected in any revision of the tourism policy. It should be noted that many policies and actions relating to climate change may exist, such as concerning buildings, which are not specific to tourism but relevant to the sector.

(b) What level of awareness and concern is there about climate change and its implications for tourism?

The extent to which this has been addressed by the tourism ministry and by industry bodies should be clear from records of meetings and from consultation. It is important to clarify whether awareness exists only at a high level or whether it is widespread in the sector.

(c) Is there sufficient technical knowledge on climate change and on how to relate this practically to tourism?

While technical knowledge about climate change may be reasonable, weaknesses may lie in the interpretation of this into practical implications for tourism, which can then be acted upon. This is important for the design and implementation of strategies and actions and has implications for capacity building and other assistance.

(d) Are policies and actions in place to mitigate climate change in the sector?

Governments should take a comprehensive approach to climate change mitigation, including considering issues relating to tourism and transport patterns in the long term as well as more short term energy use. Specific actions relating to private sector enterprises are covered in the next section (5.3). A range of instruments can be used in mitigation, such as regulations, financial incentives and voluntary instruments. These should include actions and policies to offset carbon emissions from the sector.

(e) Are policies and actions in place to help the sector adapt to the effects of climate change?

This may relate to a range of adaptation measures, relating to tourism planning, destinations, infrastructure, products and markets, both centrally and locally.

Possible actions to address the issue and improve the situation

- Strengthen coverage of climate change in the country's tourism policy and strategy/master plan.
- Improve levels of awareness on climate change
- Provide technical capacity building in climate change in relation to tourism planning, development and operations
- Develop and implement policies and actions in climate change mitigation and adaptation

Existing Services relevant to the issue that can support possible actions

5.10 Capacity Building Programmes on Climate Change Adaptation and Mitigation

5.12 Hotel Energy Solutions – Energy management toolkit

Adaptation of tourism to climate change in the Caribbean

The impacts of climate change on tourism are particularly acute in island destinations, including the 52 Small Island Developing States. The Caribbean region is one of the most vulnerable to the impacts of climate change as well as being the most tourism-dependent region on the world. CARIBSAVE is a not-for-profit organisation working with a range of stakeholders to address the impacts and challenges surrounding climate change, the environment, economic development, tourism and community livelihoods across the Caribbean Basin, using an integrated and holistic approach.

Studies by CARIBSAVE in the resort areas of Montego Bay and Negril in Jamaica, supported by international agency funding, provide an example of the approach. At the outset, climate modelling based on available data and measurements has been used to present observed and projected changes in a range of climate related conditions, including temperature, rainfall extremes, hurricanes, sea level rise and storm surges. A vulnerability profile for the area was prepared, covering issues such as water availability, food security, human health, biodiversity, infrastructure, socio-economic factors and tourism movements. Finally, adaptive capacity was assessed, considering matters such as governance, social capital, information technology and the health of the environment. The assessment fed into a set of recommendations including awareness-raising, education, resource management, enhanced monitoring, disaster management and a sea level rise adaptation plan that includes physical planning and engineering measures.

5.3 Enhancing sustainability of tourism development and operations

This section is concerned with processes to influence both the development and the operation of the tourism sector, including individual enterprises, to make it more environmentally, socially and culturally sustainable.

A central aspect of sustainability is the management of the world's resources to provide for the needs of future as well as current generations. Sustainable tourism development and operation must embrace the wise use of renewable and non-renewable resources, such as water, energy and land, including biodiversity and heritage in all of its forms.

The importance of energy conservation has been made clear in the previous section in relation to climate change. It should also be driven by concern for the future availability of sources of energy.

Water management and conservation is a major challenge for tourism in many locations in developing countries. Certain kinds of tourism can result in consumption of water per capita by tourists being many times higher than consumption by local residents. This has an environmental dimension as well as being a significant social issue affecting the wellbeing of local communities as covered in Sub-Pillar 4.4.

Reduction and management of solid and liquid waste is also becoming an increasingly urgent priority in some areas, affecting tourism both as a generator of waste but also as a sector that is very sensitive to the pollution of terrestrial and marine environments.

The need for the tourism sector to support the conservation of biodiversity and all forms of cultural heritage was covered in section 5.1 above. Issues to do with impact on local communities were also addressed under Pillar 4.

It is important that environmental and sustainability standards exist, either in general or specific to tourism, which can form the basis for regulation, inspection, guidance, information and impact assessment. Minimum standards may be statutory and regulated. Higher and wider standards can be used to provide guidelines and the criteria for voluntary certification and labelling. All the aspects of sustainability referred to earlier are covered in the Global Sustainable Tourism Criteria (GSTC)⁹¹, supported by the UNWTO and other agencies, which were drawn up initially to provide a voluntary standard for accommodation businesses and a basis for certification.

The sustainability of tourism development and operations can be addressed through the use of regulations but it can also be influenced by other instruments such as financial incentives, labelling, guidance and capacity building⁹².

At Rio+20 the Heads of State adopted a ten year framework of programmes (10-YFP) on Sustainable Consumption and Production. This is a global framework of action to enhance international cooperation to accelerate the shift towards SCP in both developed and developing countries. Significantly, one of just five initial programmes⁹³ of the 10-YFP is on sustainable tourism, including ecotourism.

The issues below address separately:

- The impact of tourism development, such as new construction etc.
- The impact of tourism operations and activities

Issue 1

The extent to which tourism development respects sustainability

Questions to assess the issue and identify weaknesses/needs

(a) Are sustainability issues, including resource constraints, taken into account in tourism plans?

Master plans which indicate the amount, type and location of tourism development in the country should take full account of the sensitivities of the natural and cultural environment and the availability of resources, including land, water, and energy. This should apply equally to national level plans and those for particular destinations and areas. In some locations which may be particularly sensitive or under pressure, detailed studies of carrying capacity (ecological, cultural, psychological and infrastructural) may be needed. This should take account of the cumulative effect of tourism development. Tourism plans should be subject to Strategic Environmental Assessment to check on their implications for sustainability over time.

(b) In general, is there considered to be a problem with the impact of tourism developments and proposals?

It may be possible to obtain a general impression of whether most recent tourism development or upcoming proposals have impacted negatively on the availability of resources or more generally on the natural and cultural environment. Particular locations under pressure, requiring better planning and management, could be identified for prioritisation for future support.

⁹¹ Global Sustainable Tourism Council - gstcouncil.org

⁹² The range of instruments are described in UNWTO and UNEP (2005) *Making Tourism More Sustainable*

⁹³ These programmes are at the core of the framework and will bring together existing initiatives and partnerships working in similar areas, building synergies and cooperation between stakeholders to leverage resources towards mutual objectives and minimizing duplication of ongoing efforts. They will encourage the involvement of governments, business, civil society and all relevant stakeholders. The programmes will use a mix of policy instruments and set clear objective, activities and indicators of success. The Secretariat of the 10-YFP is provided by UNEP.

(c) Are individual tourism developments controlled by effective land use planning processes?

Up to date land use plans should form the basis of development control procedures which lead to permission, refusal or modification of projects. In many developing countries these processes are not in place or implementation is weak. It is very important that there is a close relationship between land use plans and any area tourism strategies or destination management plans as referred to in Pillar 1.

(d) Is Environmental/Sustainability Impact Assessment effectively applied to tourism developments?

Environmental Impact Assessment (EIA) is quite a common procedure and should be a requirement of all tourism developments of a significant size or in sensitive areas. EIAs should also cover social and cultural impacts. They should be carried out objectively and fully taken into account in determining development decisions.

(e) Are economic instruments used to influence the sustainability of tourism developments?

Governments may use financial incentives, such as tax breaks, as leverage on developers to encourage them to incorporate resource efficient design and other sustainability related features into their projects.

(f) Is advice available and given to developers on the sustainability of their projects?

Capacity building, through direct advice or training programmes, can be a useful way to influence new proposals, especially those prepared by small enterprises and communities. The issuing of practical guidelines, for example on the location and design of buildings, can be particularly helpful.

Possible actions to address the issue and improve the situation

- Ensure tourism master plans, including area plans, reflect sustainability principles and resource constraints
- Provide capacity building and strengthen procedures on controlling and approving tourism developments
- Undertake pilot or demonstration projects on tourism area planning and management, relating to land use planning and development control
- Introduce financial incentives for sustainable tourism development
- Provide capacity building and advice to tourism developers on sustainability
- Prepare and disseminate development guidelines

Existing Services relevant to the issue that can support possible actions:

1.01 Tourism Development Master Plans and Strategic Development Plans

1.03 Tourism Legislation and Regulation

5.17 Strengthening of Sustainable Tourism Governance

Planning and control of new tourism development on Africa's coasts

In 2011-12 a study of governance and management of sustainable tourism in coastal areas of Africa was carried out as part of a wider project on collaborative actions for sustainable tourism undertaken by UNIDO and UNWTO and funded by the Global Environment Facility. The study looked at 9 countries in East and West Africa. It highlighted the importance of addressing the impact of tourism on the coast through strengthening processes to control and guide new development projects. While each of the nine countries was found to have some legislation and procedures in place covering coastal planning and assessment of development projects, implementation was often patchy and weak.

Recommendations put forward in the study and elaborated in each of the countries included:

- Preparing destination management plans for coastal areas that identify the shape of future tourism development, within the context of wider integrated coastal zone management strategies that cover all sectors
- Relating local land use plans to these destination management plans.
- Ensuring that comprehensive Environmental Impact Assessments are undertaken for all tourism developments on the coast, strengthening their influence on project approval and ensuring that resulting conditions are enforced
- Strengthening the capacity of local government in planning, assessment and enforcement processes
- Providing clear guidance to all developers on regulations and procedures and on the location and types of projects that meet the sustainability needs of coastal areas
- Using incentives and other instruments to support sustainable projects.

Issue 2

The extent to which tourism operations and activities respect sustainability

Questions to assess the issue and identify weaknesses/needs

(a) Are regulations in place and implemented concerning the environmental impact of tourism operations?

Most countries have regulations setting minimum environmental standards for businesses, including hotels, restaurants and other tourism establishments, especially with respect to pollution and waste. They should be the subject of inspection. However, the level of enforcement often varies. Inspection procedures may need to be strengthened, possibly through streamlining between agencies as well as capacity building.

(b) In general, are tourism service providers taking steps to improve the sustainability of their operations?

This question seeks a general impression of the extent to which hotels, restaurants and other operations are actively involved in environmental management (including minimising their resource use) and following other sustainability principles. It is important to assess the level of awareness and knowledge about this, including the position of private sector tourism associations. It may point to the need for a systematic study.

(c) Are tour operators taking account of sustainability issues in the products they promote and information they provide?

Tour operators are in a strong position to influence the businesses that they contract with by requiring that they meet specified sustainability standards. They should also provide information to inform the activities of tourists and the choices they make. Tour operators themselves should seek to make their own operations more sustainable, including in the transport they use.

(d) Are economic instruments being used to influence the sustainability of tourism operations?

Financial penalties and incentives, including targeted grants, can be used to encourage good practice, including the use of efficient technologies.

(e) Are certification schemes being used to identify businesses complying with sustainability standards?

Eco labels and specific schemes for the certification of enterprises meeting sustainability standards tend to be less actively taken up in developing countries than in the developed world. They can provide a useful tool not only for informing the market but in providing a guideline and targets for businesses. The GSTC provides a basis for raising their profile and credibility.

(f) Is capacity building and advice being provided and promoted to tourism businesses on enhancing the sustainability of their operations?

A number of tools have been developed at an international level, including the Hotel Energy Solutions Toolkit, supported by UNWTO and others. These, together with locally developed programmes, materials and advisory services, should be actively promoted to the industry by government, NGOs or industry bodies.

(g) Have actions been taken to make tourists aware of sustainability issues in the country and to influence their activities?

Many actions may be largely up to individual businesses and tour operators. However, some countries and specific destinations do take more general action, for example through codes of conduct, messages in marketing material and work with the media. Other management actions may be taken to encourage a response from tourists to sustainability issues and to influence their activities.

Possible actions to address the issue and improve the situation

- Clarify and where necessary strengthen environmental regulations and their equitable enforcement in the tourism sector
- Promote awareness of the need to address sustainability in tourism operations, through engaging with industry bodies, holding workshops and other communication activity
- Introduce economic instruments to encourage sustainability in operations
- Establish and promote use of sustainability certification in the tourism sector
- Introduce and promote capacity building programmes on environmental management and other aspects of sustainability for tourism businesses
- Prepare and disseminate guidelines and practical tools.

Existing Services relevant to the issue that can support possible actions:

1.03 *Tourism Legislation and Regulation*

5.11 *Energy Efficiency and Waste and Water Management in the Accommodation Sector*

5.12 *Hotel Energy Solutions – Energy Management Toolkit*

5.13 *Training for Tour Operators and Guides – Good Practices in Sensitive Environments*

5.17 *Strengthening of Sustainable Tourism Governance*

The Seychelles Sustainable Tourism Label

The importance of encouraging and recognising sound sustainability practice in the operation of hotels and other tourism facilities has been recognised in Seychelles, in the face of the environmental challenges and increasing awareness and expectations of tour operators and tourists. The Seychelles Sustainable Tourism Label was launched in 2012, with the support of the Tourism Board and of the industry body, the Seychelles Hotels and Tourism Association. The label is based on a third-party assessed, points-based certification scheme. The standards and criteria were designed specifically for Seychelles but also to be in compliance with the Global Sustainable Tourism Criteria. They cover eight topics within a broad sustainability agenda: management, waste, water, energy, staff, conservation, community and guests. Twenty-four of the criteria must be met to a specified minimum standard, while further criteria are additional. The scheme is actively promoted and is supported by a manual which sets out clearly the benefits of the scheme and how to approach the work and communicate the results. Technical assistance is also available to guide applicants. The first hotels to be awarded the label have pointed to the importance of mainstreaming sustainability in their operations and using the label to guide and draw attention to their activities.

5.4 Measuring and monitoring tourism impacts

The management of the tourism sector to make it more sustainable is largely about creating and responding to change. In order to inform and evaluate this process, it is important to be able to measure and monitor variations in the condition of the natural and cultural environment, whether these may have been caused by tourism or may have an impact on the sector in future.

Plans and actions need to be guided by an understanding of:

- The baseline condition of the natural and cultural environment
- How this is changing due to external factors such as climate change
- How tourism is impacting on it and how it may do so in future
- The effect of actions taken, e.g. in relation to mitigation, adaptation, development and management
- The change over time against the baseline conditions.

This process requires the selection of a set of indicators concerning not only the state of the environment but also the pressures on it and the scale of the management effort made. Indicators can also be used to identify limits of acceptable. The indicators selected should be able to be used practically for monitoring purposes and be relevant, clear and credible⁹⁴.

Regular monitoring should be undertaken, using surveys or other measurement processes, and should be consistent so that results are comparable. Results should be well disseminated.

Indicators and monitoring provide early warning of the need for a policy change or new action as well as providing a basis for planning and review.

Indicators may be identified at various levels – for the country, for local destinations and for individual enterprises. Monitoring can also take place at these levels.

⁹⁴ A detailed exposition of the use of indicators can be found in UNWTO (2004b) *Indicators of Sustainable Development for Tourism Destinations – Guidebook*.

Indicators and monitoring processes are relevant not only for the relationship with the natural and cultural environment but can cover all aspects of the performance and sustainability of tourism and its impact.

Issue 1

The extent of objective monitoring of environmental conditions and tourism impacts

Questions to assess the issue and identify weaknesses/needs

(a) Have sustainability indicators for tourism and its impact been identified?

Indicator sets should include general indicators on the condition or the environment, which may be available from official sources, as well as those that are more specific to tourism. In some countries a single indicator set has been identified nationally for use within different local destinations, so enabling comparison between them.

(b) How frequently is monitoring undertaken of environmental and cultural conditions generally?

This falls outside the sphere of tourism as such but is very important in keeping abreast of the state of the overall resource. The extent to which results are made available to tourism planners and stakeholders should also be checked.

(c) How frequently is monitoring undertaken on the impact of tourism development and operations?

This may vary considerably across the country. It is particularly important that monitoring occurs in sensitive areas and where change is known to be occurring, such as through new developments and projects.

(d) To what extent do individual tourism enterprises monitor their environmental impact?

Measurement by enterprises of their use of energy and water, of the quantity of waste produced, and of levels of emissions, is a requirement of sound environmental management. This can be supported by the publication of benchmarks, targets, tools and comparative performance figures across the sector.

(e) Are sufficient resources available for the development and use of indicators and monitoring?

The priority given to monitoring, the financial and human resources available and the existence of relevant expertise and experience, will vary. Some countries have established sustainable tourism observatories.

Possible actions to address the issue and improve the situation

- Establish a set of sustainability indicators for the tourism sector for use at different levels
- Ensure monitoring of the condition of the natural and cultural environment is undertaken regularly
- Establish baseline indicators and monitoring processes for locations where significant tourism development is planned
- Establish systems and materials to assist tourism enterprises to benchmark and monitor their impacts
- Allocate financial and human resources to the use of indicators and monitoring and provide capacity building as necessary.

Existing Services relevant to the issue that can support possible actions:

5.01 Capacity Building Programmes on Application of Indicators for Sustainable Tourism

5.02 Observatories of Sustainable Tourism – A systematic application of sustainable tourism indicators

5.12 Hotel Energy Solutions – Energy Management Toolkit

Sustainable tourism observatories piloted in China

Following many years of running training programmes on tourism sustainability indicators the UNWTO launched an initiative to facilitate the establishment of a network of sustainable tourism observatories. These would follow a systematic application of monitoring, evaluation (via indicators) and information management techniques which would be used in the development and adaptation of sustainable tourism policies, strategies and management processes. Observatories would be assisted through methodological references, capacity building, networking and exchange, highlighting good practice, and regular analysis and reporting on trends and impacts.

In 2006 a pilot observatory was established in Yangshuo, China with local stakeholders, using technical input provided by Sun Yat-Sen University. A series of data gathering and surveys furnished annual monitoring reports, using agreed indicators. Topics covered: economic benefits, tourist satisfaction, community response to tourism, health and safety, resources and environmental protection, and transport issues. The results showed a positive attitude to tourism from local residents but pointed to concerns over the congestion of certain areas, price rises, service quality and environmental impacts, including water quality. Based on the evidence, the Yangshuo government has taken action on tourism planning and specifically on water management. Subsequently other Observatories have been opened elsewhere in China, coordinated through a Monitoring Centre which will also link to other countries.

QUESTIONNAIRE: PILLAR 5 - SUSTAINABILITY OF THE NATURAL AND CULTURAL ENVIRONMENT

To facilitate a quick assimilation of the situation, the columns after the questions provide the opportunity to allocate a score, if applicable. This is based on the following scale:

1	Area of particular need/opportunity – highest priority for action/intervention	Priority for action High ↓ Low Priority for action
2	Improvement required – should also be considered for intervention/support	
3	May benefit from some improvement – but less current need for intervention	
4	Appears to be satisfactory – maintain	
5	Area of apparent strength – may provide an example to others	
X	No information available to answer the question /This could not be assessed	

5.1 Relating tourism to natural and cultural heritage

Issue 1: Effective policies and actions to conserve and promote natural heritage

	QUESTION	COMMENT	Priority for action							
			High	Low	1	2	3	4	5	X
a	Does the country's tourism policy and strategy/master plan cover tourism issues related to natural heritage?									
b	Do policies on natural resources cover the issues and opportunities related to tourism?									
c	How well protected are the country's natural heritage assets, including the extent and effectiveness of protected areas?									
d	Is tourism being effectively planned and managed in national parks and other natural heritage areas and sites?									
e	Is tourism included in specific policies and actions to plan and protect the coastal zone?									
f	Is there a well-established tourism product/offer related to natural heritage in the country?									
g	Overall, is the country's natural heritage supported by tourism or threatened by it?									

Issue 2: Effective policies and actions to safeguard and promote cultural heritage

a	Does the country's tourism policy and strategy/master plan cover tourism issues related to cultural heritage?								
b	Do policies on culture cover the issues and opportunities related to tourism?								
c	How well protected and conserved are the country's cultural heritage assets?								
d	Is tourism being effectively planned and managed at cultural heritage sites?								
e	Is there a well-established tourism product/offer related to cultural heritage in the country?								
f	Overall, is the country's cultural heritage supported by tourism or threatened by it?								

5.2 Focussing on climate change

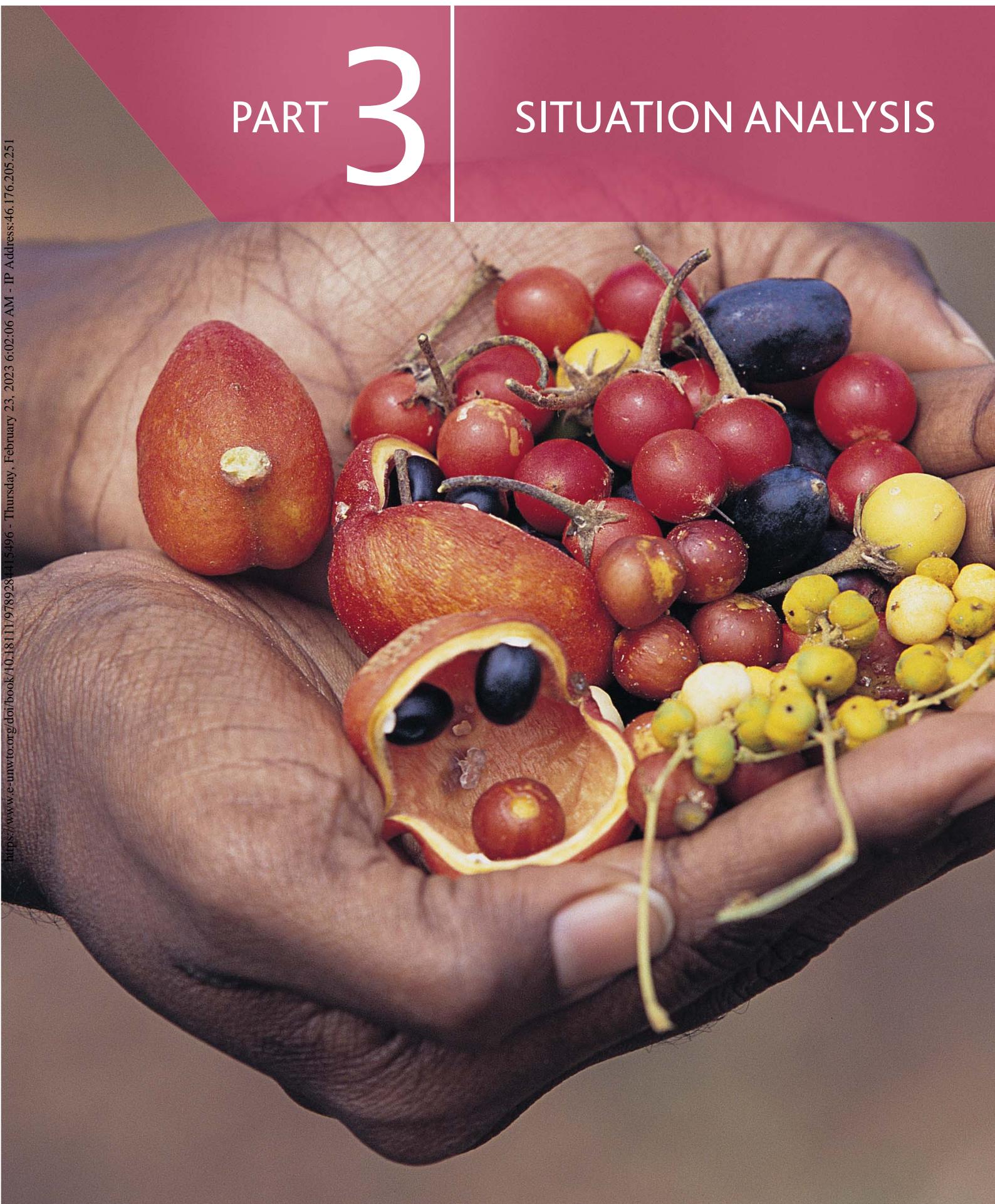
Issue 1: Sufficient attention to climate change in the tourism sector

a	Is climate change and resource management fully addressed in the tourism policy and strategy/master plan?								
b	What level of awareness and concern is there about climate change and its implications for tourism?								
c	Is there sufficient technical knowledge on climate change and on how to relate this practically to tourism?								

	QUESTION	COMMENT	Priority for action					
			High	1	2	3	4	
d	Are policies and actions in place to mitigate climate change in the sector?							
e	Are policies and actions in place to help the sector adapt to the effects of climate change?							
5.3 Enhancing sustainability of tourism development and operations								
Issue 1: The extent to which tourism development respects sustainability								
a	Are sustainability issues, including resource constraints, taken into account in tourism plans?							
b	In general, is there considered to be a problem with the impact of tourism developments and proposals?							
c	Are individual tourism developments controlled by effective land use planning processes?							
d	Is Environmental/Sustainability Impact Assessment effectively applied to tourism developments?							
e	Are economic instruments used to influence the sustainability of tourism developments?							
f	Is advice available and given to developers on the sustainability of their projects?							
Issue 2: The extent to which tourism operations meet sustainability standards								
a	Are regulations in place and implemented concerning the environmental impact of tourism operations?							
b	In general, are tourism service providers taking steps to improve the sustainability of their operations?							
c	Are tour operators taking account of sustainability issues in the products they promote and information they provide?							
d	Are economic instruments being used to influence the sustainability of tourism operations?							
e	Are certification schemes being used to identify businesses complying with sustainability standards?							
f	Is capacity building and advice being provided and promoted to tourism businesses on enhancing the sustainability of their operations?							
g	Have actions been taken to make tourists aware of sustainability issues in the country and to influence their activities?							
5.4 Measuring and monitoring tourism impacts								
Issue 1: The extent of objective monitoring of environmental conditions and tourism impacts								
a	Have sustainability indicators for tourism and its impact been identified?							
b	How frequently is monitoring undertaken of environmental and cultural conditions generally?							
dc	How frequently is monitoring undertaken on the impact of tourism development and operations?							
d	To what extent do individual tourism enterprises monitor their environmental impact?							
e	Are sufficient resources available for the development and use of indicators and monitoring							

PART 3

SITUATION ANALYSIS



1. Introduction

According to the 2008 *UN Recommendations on Tourism Statistics*, "tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for reasons such as leisure, business, religious or health reasons and other purposes such as visiting friends and relatives".

With over one billion international tourists travelling the world in 2012 and an estimated five to six billion travelling within their national borders, tourism is a key sector in economies worldwide, both in advanced ones and in emerging and developing countries.

Tourism is estimated to account for 9% of the world's GDP – direct, indirect and induced impacts, employ one in every 11 people globally and represent 6% of worldwide exports.

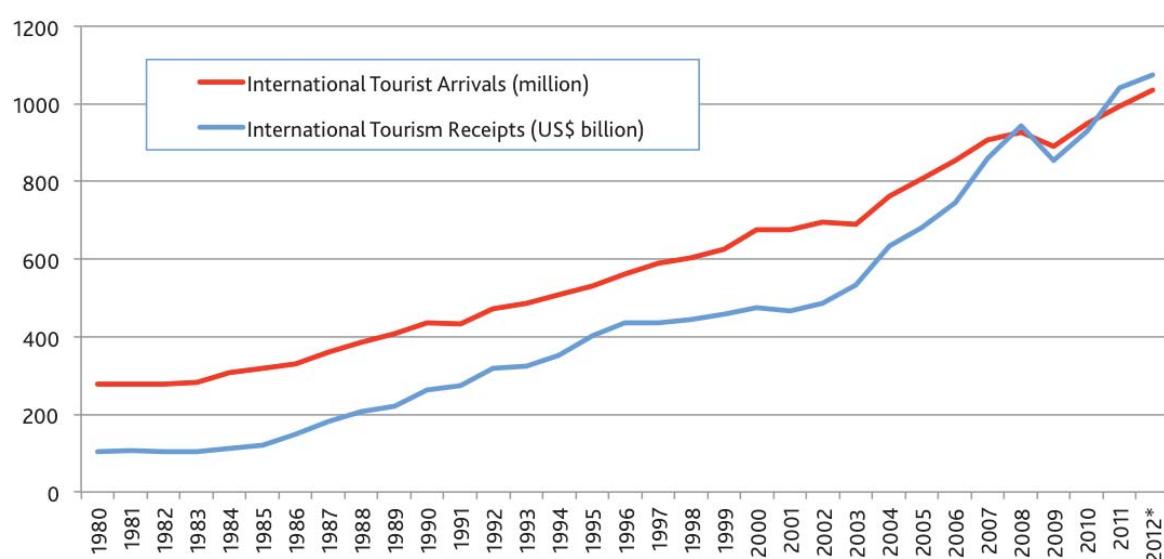
Below is a brief analysis of a) main trends in international tourism during the last decades, b) future growth prospects for the tourism sector and c) how tourism impacts the three pillars of sustainable development – economic, social and environmental.

2. Tourism: growth and diversification

2.1 International tourism 1950-2012

The last six decades have seen extraordinary growth for international tourism. In 1950, 25 million tourists (overnight visitors) traveled internationally, by 1980 this number had risen more than tenfold to 278 million, while since then it has almost quadrupled. In 2012, the number of international arrivals surpassed one billion to reach 1.035 million – over one billion international tourists traveling the world in a single year. Indeed, over 60 years ago, international travel was reserved for the privileged few. Most people lived, worked and holidayed within a relatively small radius. In 2012, just a few generations later, total international tourist arrivals surpassed one billion.

Figure 1. International tourist arrivals and receipts, 1980-2012



Source: World Tourism Organization (UNWTO)

People are not just traveling more, they are traveling further, and they are travelling to and from virtually any country in the world. Of the 25 million tourists who crossed international borders in 1950, most came from, and traveled to, Europe and North America. In 2012, destinations in the emerging and developing economies of Asia, Latin America, Africa and the Middle East received nearly half of the world's international tourist arrivals (47%) as compared to 29% in 1980. The immense expansion of tourism in emerging economies creates vast opportunities to use tourism as a tool to drive economic growth and development.

Expenditure by all these visitors on accommodation, food and drink, local transport, entertainment and shopping is an important contributor to the economy of many destinations, creating much needed employment and opportunities for development. For some 90 countries, receipts from international tourism were over US\$ 1 billion in 2012.

Over time, the growth trend in international arrivals is closely matched by the trend in receipts (in real terms, i.e. taking inflation and exchange rate fluctuations into account). Worldwide, international tourism receipts reached US\$ 1075 billion in 2012 (euro 837 billion), up from US\$ 2 billion in 1950 and US\$ 104 billion in 1980.

Figure 2. International tourism receipts, 2012



2.2 International tourism and developing countries

The growth of international tourism in emerging market and developing countries has been even more significant. International tourist arrivals in the 49 Least Developed Countries (LDCs) increased from 1.4 million in 1980 to 21 million in 2012. To give perspective, although on a smaller scale, the growth rate of international tourist arrivals in the LDCs has been substantially higher than that of the world. While international tourist arrivals grew by 4% a year on average between 1980 and 2012, the growth of arrivals in the LDCs reached close to 9% a year.

Table 1. International tourist arrivals by income category, 1980-2012

	International Tourist Arrivals, Emerging market and developing countries versus advanced economies										Market share %	Growth rate %	Average annual growth (%)		
	International Tourist Arrivals (million)								1980	1995	2012*				
	1980	1990	1995	2000	2005	2010	2011	2012*			11/10 I2*/11	80-12*	95-12*		
World	278	436	529	677	807	949	995	1.035	100	100	100	4,8	4,0	4,2	4,0
Emerging market and developing countries ¹	83	139	194	258	350	445	467	487	29,7	36,6	47,0	4,9	4,2	5,7	5,6
49 Least developed Countries (LDCs)	1,4	2,7	3,9	5,8	9,9	17,2	18,8	20,7	0,5	0,7	2,0	9,1	10,1	8,8	10,3
non-fuel exporters	1,3	2,5	3,8	5,5	9,1	15,1	16,8	18,7	0,5	0,7	1,8	11,0	11,5	8,6	9,9
fuel-exporters	0,1	0,2	0,1	0,2	0,8	2,1	2,0	1,9	0,0	0,0	0,2	-4,5	-1,3	11,1	17,9
Other emerging market and dev. countries	81	136	190	252	340	428	448	466	29,2	35,9	45,1	4,8	4,0	5,6	5,4
non-fuel exporters	74,5	127,4	168,4	212,2	289,7	366,2	377,3	393,2	26,8	31,8	38,0	3,0	4,2	5,3	5,1
fuel-exporters	6,8	8,5	21,6	39,6	50,4	61,7	71,1	73,1	2,4	4,1	7,1	15,1	2,9	7,7	7,4
Advanced economies ¹	195	297	336	419	457	504	528	548	70,3	63,4	53,0	4,7	3,8	3,3	2,9

Source: World Tourism Organization (UNWTO) based on national sources

(Data as collected by UNWTO June 2013)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

The growth of international tourism in the LDCs in recent decades was also reflected in the receipts earned, which rose in this group of countries by more than 25 times between 1980 and 2012 – from US\$ 0.5 billion to over US\$ 12 billion. As in the case of international tourist arrivals, receipts also grew faster in the LDCs than in the world. The annual average growth rate of international tourism receipts reached 11% in the LDCs between 1980 and 2012 as compared to 8% worldwide, 9% in emerging markets and developing countries overall and 7% in advanced economies (percentages are in current terms, so inflation and exchange rate fluctuations are not taken into account).

Table 2. International tourism receipts by income category, 1980-2012

	International Tourism Receipts, Emerging market and developing countries versus advanced economies										Market share %	Growth rate %	Average annual growth (%)		
	International Tourism Receipts (US\$, billion)								1980	1995	2012*				
	1980	1990	1995	2000	2005	2010	2011	2012*			11/10 I2*/11	80-12*	95-12*		
World	104	262	403	475	680	930	1.042	1.075	100	100	100	12,1	3,1	7,6	5,9
Emerging market and developing countries ¹	25	55	104	139	224	341	371	386	23,7	25,8	35,9	8,8	4,0	9,0	8,0
49 Least developed Countries (LDCs)	0,5	1,1	2,0	2,6	4,8	9,6	11,2	12,2	0,5	0,5	1,1	16,3	8,5	10,7	11,1
non-fuel exporters	0,4	1,0	1,9	2,5	4,4	7,5	9,5	10,4	0,4	0,5	1,0	25,7	9,8	10,4	10,4
fuel-exporters	0,03	0,1	0,1	0,1	0,4	2,1	1,7	1,8	0,0	0,0	0,2	-17,2	1,5	13,4	16,9
Other emerging market and dev. countries	24	54	102	136	220	331	360	374	23,3	25,2	34,8	8,6	3,9	8,9	8,0
non-fuel exporters	21,3	49,8	91,5	123,1	199,5	295,1	317,4	328,2	20,6	22,7	30,5	7,6	3,4	8,9	7,8
fuel-exporters	2,8	3,9	10,2	13,1	20,0	36,3	42,4	45,6	2,7	2,5	4,2	17,0	7,6	9,1	9,2
Advanced economies ¹	79	207	299	337	456	589	671	689	76,3	74,2	64,1	13,9	2,6	7,0	5,0

Source: World Tourism Organization (UNWTO) based on national sources

(Data as collected by UNWTO June 2013)

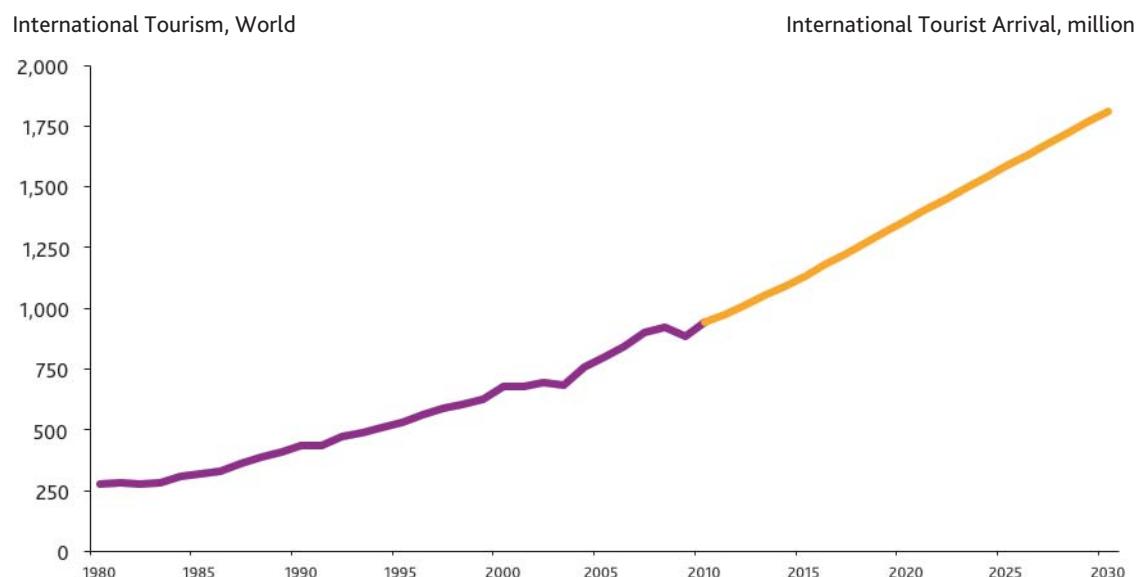
¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

2.3 Tourism Towards 2030 – international tourist arrivals to reach 1.8 billion

The expansion of international tourism is set to continue in the coming decades. International tourist arrivals are forecast to reach 1.8 billion by 2030 according to the UNWTO long-term forecast, *Tourism Towards 2030*.

International tourism will continue to grow in the period up to 2030, but at a more moderate pace than the past decades, with the number of international tourist arrivals worldwide increasing by an average 3.3% a year. As a result, an average of 43 million additional international tourists will join the marketplace every year. At this projected pace of growth, arrivals are expected to reach 1.8 billion in 2030, meaning that in two decades' time, five million people will be crossing international borders every day for leisure, business or other purposes such as visiting friends and family.

Figure 3. International tourist arrivals, 1980-2030



Source: World Tourism Organization (UNWTO) ©

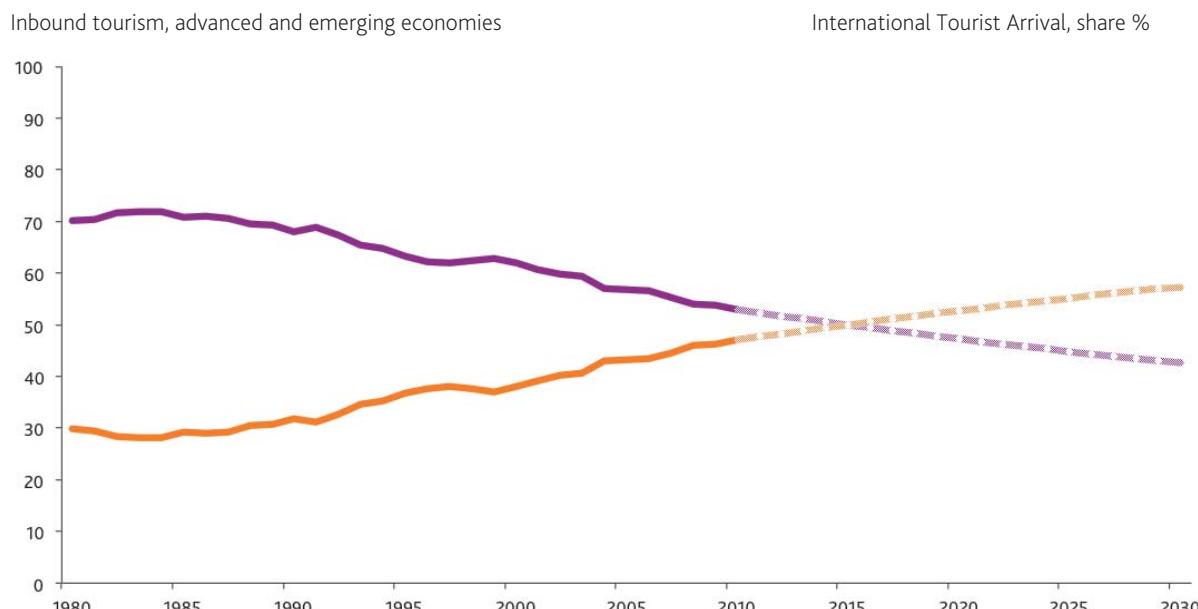
The share of international tourism flows towards the emerging economies, which has increased substantially in the last decade, is expected to be strengthened in the period up to 2030.

International arrivals in emerging economy destinations are expected to grow at double the pace of advanced ones (+4.4% year vs. +2.2% a year). In absolute terms, the emerging economies of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa will gain on average 30 million arrivals a year, compared to 14 million in the traditional destinations of the advanced economies of North America, Europe and Asia and the Pacific.

By 2015, emerging economies will receive more international tourist arrivals than advanced economies and by 2030 their share is expected to reach 58%.

There will be increases in the global market shares of Asia and the Pacific (to 30% in 2030 up from 22% in 2010), the Middle East (to 8% from 6%) and Africa (to 7% from 5%), and further declines in the shares of Europe (to 41% from 51%) and the Americas (to 14% from 16%), mostly due to the slower growth of North America.

Figure 4. International tourist arrivals, emerging and advanced economies, 1980-2030



Source: World Tourism Organization (UNWTO) ©

2.4 A note on domestic tourism

According to UNWTO estimates, five to six billion people across the world are estimated to travel domestically every year. Although the current analysis is focused on international tourism it is essential to stress the importance of domestic tourism not only due to its large numbers but also due to the socio-economic relevance domestic tourism has. As an example, domestic tourism represents half or more of the tourism expenditure in all G20 economies, reaching as much as 82% in India, 87% in Mexico or 91% in China.

Domestic and international tourism are often complementary and domestic tourism should be an integral component of any tourism development plan, bearing in mind the opportunities and challenges which are specific to domestic tourism including the possibility to expand tourism demand in time and thus decrease seasonality, and in space, therefore benefiting rural and remote regions.

3 Tourism – a source of economic growth and development

The phenomenal development of international tourism driven by the growth of international business, the increase in leisure time, the technological and transport revolutions and the rise of middle classes, has positioned tourism as one of the world's great growth engines.

Today, tourism is estimated to account for 9% of the world's GDP – considering its direct, indirect and induced impacts – 6% of world's exports, 29% of service exports and one in every eleven jobs.

Representing for the LDCs 5% of total exports and 44% of the exports of services, tourism also provides often one of the few competitive options for these countries to take part in the global economy. It is thus no surprise that tourism has been identified by most of the LDCs and the Small Islands Developing States (SIDS) as a powerful engine for poverty reduction and development.

The role of tourism in poverty alleviation and development is reflected in the influence that the sector has in the three countries that have so far graduated from the LDC category and how that has contributed to such important step. Tourism accounts for 11% of Botswana's exports, 80% in the case of the Maldives and 56% in Cape Vert.

Nonetheless, many challenges remain, none the least ensuring that the world's poorest countries – over half of which have tourism as a priority instrument for poverty reduction – continue to benefit from the income and social opportunities provided by the tourism sector, while tackling the environmental challenge. This is particularly relevant in respect to air transport and climate change. It is, for example, crucial to ensure that there is a differing treatment, including some exemptions, transitional arrangements and incentives for one or more groups of developing countries, in any long-term multilateral framework for mitigation of greenhouse gas GHG emissions in aviation.

3.1 Tourism as an export sector

In economic terms, international tourism is a traded service, where the money earned by destination countries count as an export and the money spent by visitors count as an import for the source markets they are originating from. Except for international tourism receipts (the travel item in the Balance of Payments), tourism also generates export earnings through international passenger transport. As mentioned above, international tourism receipts (the travel item) reached US\$ 1075 billion in 2012. Adding an estimated US\$ 211 billion in international passenger transport brings overall export income generated by international tourism, including passenger transport, to US\$ 1.3 trillion or US\$ 3.5 billion a day on average in 2012.

Tourism exports account for as much as 29% of the world's exports of commercial services and 6% of overall exports of goods and services. International tourism has thus become one of the world's major trade categories ranking fifth after fuels, chemicals, food and automotive products. For many developing countries, international tourism is a major source of foreign exchange and investment, creating much needed employment and business opportunities. For the emerging economies as a group, tourism ranks as the fourth largest export category after fuels, chemicals and food. However, only a comparatively small number of countries benefit from the latter three categories.

For the majority of individual developing countries tourism is one of the top three exports. It is the lead export for at least 11 LDCs and is an important sector of economic activity in all LDCs that have managed to or are about to graduate out of the LDC status. In 2011, total exports from tourism (including travel and passenger transport) in the 49 LDCs amounted to US\$ 11 billion, representing 5% of the total exports of this group of countries and 44% of its exports of traded services. This percentage is significantly higher within non-fuel LDCs exporters where it reaches as much as 8% of the total export value.

Table 3. International tourism as a share of exports by income category

	Population, Gross Domestic Product (GDP), Exports and International Tourism, Emerging market and developing countries versus advanced economies															
	Pop- mn 2012	GDP			International Tourism					Exports goods and services					International Tourism	
		per capita			Total			Total of which		% GDP per capita			Total of which		share in Exports 2011	share in Services 2011
		mn 2012	US\$ bn 2012	US\$ 2012	US\$ bn 2011	2012	2012	Travel	Passenger transport	US\$ 2012	US\$ 2012	US\$ 2011	US\$ bn 2011	2011	2011	
World	7.011	71.707	10.225		1.043	1.285	1.075	211	1,8	183	22.644	18.291	4.353	4,6	23,9	
Emerging market and developing countries ¹	5.979	27.290	4.560		371	452	386	66	1,7	76	8.441	7.390	1.051	4,4	35,3	
49 Least developed Countries (LDCs)	873	745	855		11,2	15,0	12,2	2,8	2,0	17	228	202	25	4,9	44,4	
non-fuel exporters	780	499	640		9,5	12,7	10,4	2,3	2,5	16	119	97	22	7,9	42,4	
fuel-exporters	92	246	2.675		2,1	2,3	1,8	0,6	0,9	25	109	106	3	2,0	72,1	
Other emerging market and dev. countries	5.107	26.545	5.195		360	437	374	63	1,6	86	8.213	7.187	1.026	4,4	35,1	
non-fuel exporters	4.519	20.820	4.605		317	372	328	44	1,8	82	5.906	5.012	894	5,4	35,5	
fuel-exporters	587	5.725	9.745		43	65	46	19	1,1	110	2.307	2.175	132	1,9	32,6	
Advanced economies ¹	1.032	44.417	43.060		671	834	689	145	1,9	808	14.203	10.901	3.302	4,7	20,3	

Source: World Tourism Organization (UNWTO) based on national sources, International Monetary Fund (IMF), World Trade Organization (WTO) and United Nations (Data as collected by UNWTO June 2013)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

Considering the relevance of international tourism as an export category by region, it becomes clear that tourism can be a major catalyst for development in Africa where it already represents 7% of all exports or in Central America where it accounts for as much as 13% of the sub-region's exports. Tourism is furthermore the first export category in the Caribbean and in Southern and Mediterranean Europe and the second most important category in Northern Africa. For Central America, the Middle East and Northern Europe, tourism is the third most important export.

Table 4. International tourism as a share of exports by region

	International Tourism and Exports by (Sub)region									
	Tourism Exports (US\$)			Exports goods and services (US\$)			Tourism Exports (US\$)			
	Total	of which:		Total	of which:		share in Exports	share in Services	(%)	
		Travel	Passenger transport (US\$ billion)		Goods	Services				
	2011	2011	2011		2011	2011				2011
World	1.244	1.042	202	22.619	18.288	4.331	5,5	28,7		
Advanced economies ¹	813	671	142	14.203	10.901	3.302	5,7	24,6		
Emerging economies ¹	431	371	60	8.441	7.390	1.051	5,1	41,0		
Europe	561,4	466,3	95,1	9.724,6	7.503,7	2.220,9	5,8	25,3		
Northern Europe	92,3	69,8	22,5	1.801,3	1.170,9	630,3	5,1	14,6		
Western Europe	200,6	161,6	39,0	4.599,4	3.647,8	951,6	4,4	21,1		
Central/Eastern Europe	69,1	56,0	13,1	1.696,9	1.482,1	214,7	4,1	32,2		
Southern/Mediterranean Eu.	199,4	178,9	20,5	1.627,0	1.202,9	424,2	12,3	47,0		
- of which EU-27	454,1	378,3	75,8	8.440,9	7.389,7	1.051,2	5,4	43,2		
Asia and the Pacific	339,9	298,6	41,3	7.209,3	6.101,0	1.108,3	4,7	30,7		
North-East Asia	170,2	149,6	20,6	4.677,1	4.049,6	627,5	3,6	27,1		
South-East Asia	97,8	84,4	13,4	1.493,3	1.237,0	256,3	6,6	38,2		
Oceania	45,3	40,8	4,4	383,2	318,6	64,5	11,8	70,1		
South Asia	26,6	23,7	2,9	655,7	495,8	160,0	4,1	16,6		
Americas	244,6	197,9	46,6	3.869,1	3.034,1	835,0	6,3	29,3		
North America	184,6	144,2	40,3	2.985,0	2.282,1	702,8	6,2	26,3		
Caribbean	24,6	23,5	1,0	63,3	33,0	30,2	38,8	81,3		
Central America	8,7	7,1	1,6	68,8	51,1	17,7	12,6	49,1		
South America	26,8	23,1	3,7	752,1	667,8	84,3	3,6	31,8		
Africa	41,2	32,7	8,5	621,0	549,0	72,1	6,6	57,1		
North Africa	12,4	9,6	2,9	145,9	122,5	23,3	8,5	53,4		
Subsaharan Africa	28,7	23,1	5,6	475,2	426,4	48,7	6,0	58,9		
Middle East	57,1	46,6	10,4	1.195,5	1.100,3	95,2	4,8	60,0		

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO June 2013)

¹ Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF World Economic Outlook of April 2012, page 177, at www.imf.org/external/pubs/ft/weo/2012/01.

3.2 Tourism and employment

Tourism accounts for over 230 million jobs in the world – direct, indirect and induced impacts. A service sector, tourism is not only one of the most labor intensive economic sectors, but also a fast entry point to the job market, particularly for women and youth.

Furthermore, tourism creates jobs not only in the sector itself, but in other sectors through its complex value chain. At their destinations, tourists travel by local bus or taxi, taste the local gastronomy and wines, buy local produce and sleep in hotels furnished with linen or TV sets.

Tourism employment and entrepreneurship is equally important for the promotion of gender equality. A report by UNWTO and UN Women shows that the share of women entrepreneurs in hotel and restaurants is consistently higher than in other industries in all world regions. This percentage is particularly high in Latin America (51% women entrepreneurs in hotels & restaurants as compared to 23% in all sectors) and in Asia (30% vs. 17%).

Table 5. Women entrepreneurs by region (%)

Women entrepreneurs by region (%)

	All sectors	Hotel & Restaurants
Latin America	23	51
Caribbean	26	33
Africa	21	31
Asia	17	30

Source: International Labour Organization (ILO) Laborsta Data Base

Another important factor to consider in terms of the linkages between tourism employment and development is the fact that tourism jobs spread to remote and rural areas as much as they reach urban areas, therefore creating jobs and business opportunities at the local level and helping reduce rural-urban migration.

Although the sector offers countless opportunities, it also faces important challenges, including low wages, low skills and precarious working conditions. It is critical to promote tourism jobs which are decent jobs with decent work conditions and reduced precariousness. Considering that tourism is mainly a people's sector, the level of wages, training and working conditions are central to ensure quality and customers' satisfaction and should be a priority in any tourism strategy aimed to foster development.

3.3 The tourism value chain – creating wealth and jobs in other sectors

At their destinations, tourists travel by local bus or taxi, taste the local gastronomy and buy local produce and handicrafts. When hotel properties are developed, their construction and operations imply the use of suppliers in diverse areas such as construction materials, food, furniture, electronic equipment and many others. These linkages are important for all economies, but more so for developing countries where tourism creates demand that otherwise might not have existed for specific products from agriculture, construction, industry or handicrafts. In some cases, such demand even translates into the recovery of lost activities and skills.

When looking into the role of tourism in development, it is of particular importance to strengthen such linkages. This can be done through adequate legislation and regulation on investment – particularly foreign investment– by supporting the diverse sectors to connect to the tourism value chain and by providing them adequate financing and training allowing them to produce in line with tourism demand. The diagram below illustrates the tourism value chain and the range of services and goods directly and indirectly related to tourism demand.

Figure 4. Tourism Value Chain



Source: UNWTO adapted from Tourism & Leisure Europraxis consulting based on various sources.

3.4 Tourism – building resilience

In spite of the multiple changes and shocks, ranging from health concerns to natural disasters and man-made crises, tourism, although vulnerable, has always bounced back, proving its resilience and capacity to rebound. Indeed, international tourism has grown continuously during recent decades, only declining on three occasions: in 2001 following the September 11 attacks; in 2003 under the impact of SARS and in

2009 amidst the global economic crisis. In all cases, international tourism recovered strongly in the following years with growth rates often above the long term trend of the last decade (+4%).

One of tourism's significant characteristics is indeed its capacity to recover relatively quickly and more strongly. This is of importance as it helps build resilience in all economies, but in particular in those of developing countries which tend to be more vulnerable. Therefore, the inclusion of tourism as a pillar of national development will contribute to building resilience and a higher capacity to deal with external shocks. A case in point is Kenya. The 2007-2008 political unrest in the country led to a decline of 32% in the number of international tourist arrivals in 2008. The following year, arrivals grew by 22% even amidst the global economic crisis, and have continued to grow in the following years (6% in 2010 and 19% in 2011).

Data included in the UNWTO/ILO report *Economic Crisis, International Tourism Decline and its Impact on the Poor*, show that during the 2009 global economic crisis, employment in hotels and restaurants was less affected than in other industries. This trend was even stronger in emerging economies where employment in "hotels and restaurants" was, together with employment in public administration, the only one to show positive growth in all four quarters of 2009.

4. Tourism - one of the ten sectors leading the transformation to the Green Economy

It was not until the early nineties, and particularly since the first Earth Summit in Rio (1992), that the concept of sustainable tourism developed. The principles established in the Rio Declaration served as the basis for the progressive development of UNWTO's sustainable tourism programme, which in 1995 defined sustainable tourism as "one that meets the needs of present tourists and of the host regions while protecting and promoting opportunities for the future. It is conceived as a way to manage all resources so that they can meet the economic, social and environmental needs while respecting the cultural integrity, essential ecological processes, biological diversity and life support systems".

The World Summit on Sustainable Development (2002), also known as the Johannesburg Summit, emphasized for the first time the importance of sustainable tourism for poverty reduction, the protection of the environment and the preservation of cultural heritage. It was, in fact, the first time that tourism's role in the global sustainable development agenda was made explicit with the inclusion of tourism in the Joint Programme of Implementation emerging from Johannesburg.

Since the Rio Summit in 1992, and particularly since 2002, significant progress has been made in a number of areas related to sustainable tourism, including environmental sustainability, climate change, social inclusion or gender equality. Nonetheless, much is still to be achieved.

The recent crises – financial, economic, food and energy - have highlighted many of the limitations of the current development model. Amidst the global economic crisis of 2009 the UN called for a new growth model – the Green Economy – a model "that results in improved human wellbeing and social equity, while significantly reducing environmental risks and ecological scarcities".

At the beginning of 2011, the Green Economy Report – a groundbreaking UN study led by the UN Environmental Programme (UNEP) on how to spur a green transformation while ensuring continued growth – identified tourism as one of ten economic sectors key to greening the global economy.

The *Tourism Chapter of the Green Economy Report*, developed in collaboration with UNWTO, shows that investing 0.1% to 0.2% of the global GDP between 2010 and 2050 in environmentally-friendly tourism could drive economic growth, lead to poverty reduction and job creation, while ensuring significant

environmental benefits such as reductions in water consumption (18%), energy use (44%) and CO₂ emissions (52%) compared to a “business-as-usual” scenario.

Investment in green tourism, the report highlights, would stimulate job creation, especially in poorer communities, including new green jobs related to environmental management and Information and Communications Technology (ICT), with increased local hiring and sourcing and positive spill-over effects on many other areas of the economy. The direct economic contribution of tourism to local communities would also increase, maximizing the amount of tourist spending that is retained by the local economy. Finally, a green tourism economy would ensure significant environmental benefits including reductions in water consumption, energy use and CO₂ emissions.

Given tourism's sheer size and reach, even small changes towards greening can have significant impacts. But to drive these actions, the sector needs the right policies and the right investment. To position sustainability at the heart of the tourism development agenda requires understanding that this is not only a responsibility; it is also in the interest of the sector.

Governments and the international community at large have a key role to play in the move towards green tourism, namely through establishing sound regulatory frameworks, facilitating public investment and incentivizing private engagement. This is of particular importance to the development agenda given the opportunities generated by tourism for the least developed and developing countries.

Today, perhaps the single greatest limiting factor for greening tourism is lack of access to capital, particularly at a global scale for developing countries, and at the national level for all Small and Medium Enterprises (SMEs), which represent the bulk of the sector. Public financing is essential for jumpstarting the green economic transformation. Governments and international organizations need to facilitate the financial flow to the tourism sector by prioritizing investment and spending in areas that stimulate greening. Subsidies and tax incentives are just some of the tools that governments can employ. Through public-private partnerships, governments can help to spread the costs and risks of large green tourism investments. At the same time, government spending on public goods such as protected areas, water conservation, waste management, sanitation, public transport and renewable energy infrastructure can reduce the cost of green investments by the private sector in green tourism.

On the business side, innovation should be at the top of the agenda together with productivity improvement through efficient equipment use, savings from fossil fuel substitution and local and global carbon markets. In joining the sector on these efforts, UNWTO launched “Hotel Energy Solutions” in 2008, an initiative co-funded by the European Agency for Competitiveness and Innovation, developed in partnership with several international partners, which provides hoteliers across the world free electronic software to assess their energy consumption and while proposing to them the most profitable investment alternatives in terms of energy efficiency and renewable energies. Finally, from the tourists' side, important opportunities exist to create awareness of the impacts tourism can have and to promote a culture of responsibility while travelling.

4.1 The tourism private sector role in promoting development

It is important as well to note that the private sector has a key role to play in achieving development targets, including poverty reduction. UNWTO research demonstrates the diversity of domains in which Corporate Social Responsibility (CSR) strategies can contribute to achieve the Millennium Development Goals (MDGs).

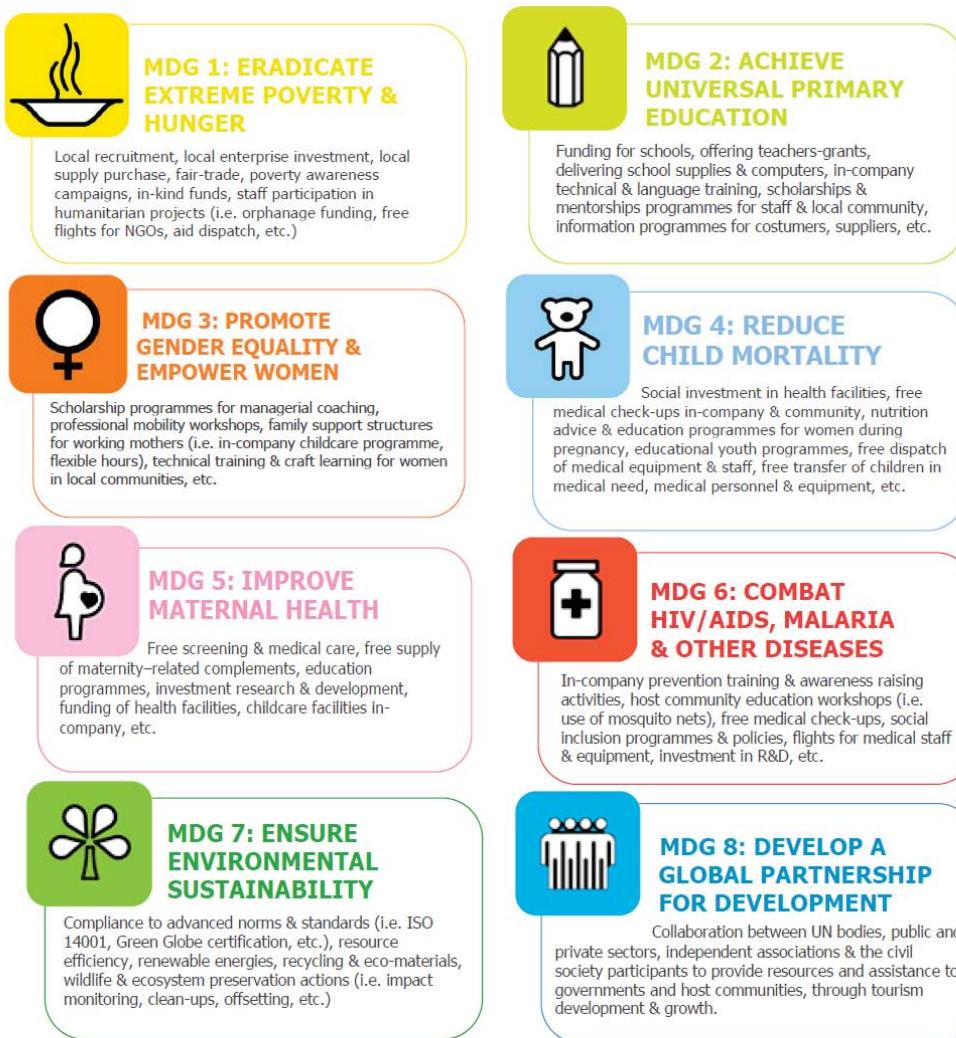
Figure 5. Tourism and the MDGs

TOURISM AND THE MILLENNIUM DEVELOPMENT GOALS



As the 2015 deadline for the UN Millennium Development Goals approaches, the World Tourism Organization (UNWTO) invites the private sector to help address these global challenges. Poverty, hunger, gender inequality and environmental degradation can be alleviated through the sustainable development of tourism and UNWTO is working with the industry to maximise the positive impacts of tourism worldwide.

UNWTO research shows that many companies are contributing to the achievement of the MDGs by integrating CSR into their business. Here are a few examples of CSR activities currently being implemented by leading tourism companies that relate directly to the MDGs.



For more information and to find out how to get involved visit:

www.UNWTO.org

Source: World Tourism Organization (UNWTO) ©

5. Official Development Assistance (ODA) for Tourism

Aid is a small component of international resource flows available to developing countries, but it is the only source of international finance that is officially dedicated to poverty reduction, accounting for approximately 7% of international flows.

Aid targets, both the national and international 0.7% target, are commonly expressed as a proportion of gross national income (GNI). As a whole, DAC donors allocate 0.73% of public expenditure to ODA. Other type of Aid accounted such as Other Official Flows (OOF) are official sector transactions which do not meet the ODA criteria, as well as Private Grants (PG).

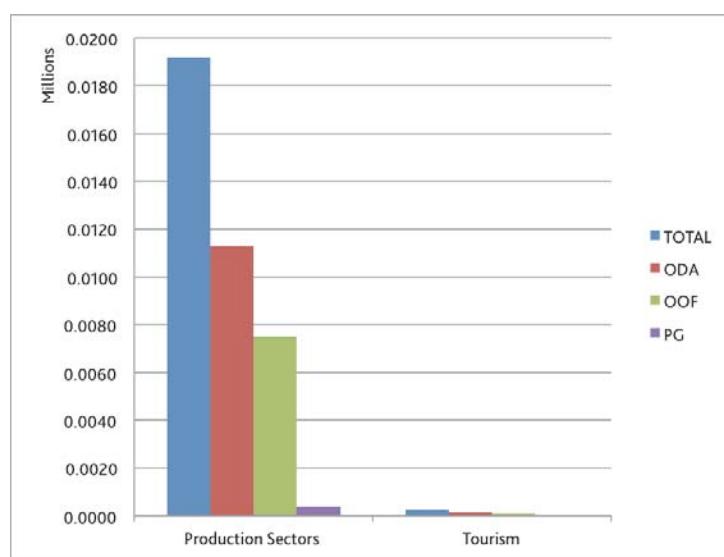
Despite the highly recognized potential of tourism to achieve development imperatives, with backward linkages to other productive sectors of the economy and job creation, tourism has never received much support in ODA flows. In 2011, tourism represented only 0.13% of the Total Aid Gross Disbursements.

Table 6. Aid Gross Disbursements to Developing Countries, 2011 (constant prices, US\$ million, 2010)

	All Sectors	All Sectors %	Production Sectors	Production Sectors %	Tourism	Tourism %
TOTAL AID	198 827	100%	19 181	9.7%	251	0.13%
ODA	150 444	100%	11 279	7.5%	154	0.10%
OOF	45 799	100%	7 531	16.4%	97	0.21%
PG	2 584	100%	370	14.3%	0	0%

Source OECD Creditor Reporting System

Figure 5. Total Aid to Developing Countries reported as Production Sectors and as Tourism, Gross Disbursements, 2011



Source OECD Creditor Reporting System

While tourism is referenced as a productive sector, it is important to note that tourism, as a trade in the services category, is identified by many developing countries and the LDCs in particular, as a key sector for poverty reduction strategies, with a high impact on other productive sectors and local impacts to the poor. It is interesting to note that ODA for tourism was almost 400% more in 2006 compared to 2011.

Table 7. Total ODA by sector, 2005-2011 (current prices, US\$ million)

	Year	2005	2006	2007	2008	2009	2010	2011
Sector								
<u>I. Social Infrastructure & Services</u>								
I.1. Education		41320,82	46354,03	54095,98	61982,77	65454,13	64326,47	68655,68
I.1.b. Basic Education		7896,21	10093,56	11670,03	12423,32	13511,73	13413,52	12852,47
I.2. Health		2424,17	2935,76	2867,09	3707,93	3319,58	3891,76	3691,17
I.2.b. Basic Health		5621,06	7103,61	7101,79	8670,46	8747,77	9849,61	10083,27
I.3. Population Pol./Progr. & Reproductive Health		3724,61	4504,08	5318,37	6515,24	6424,64	6863,57	6878,84
I.4. Water Supply & Sanitation		3995,55	5065,92	7299,33	9289,56	9145,69	9773,91	10743,95
I.5. Government & Civil Society		5917,37	5777,42	6376,55	7516,61	8262,9	7584,75	8230,16
I.5.a. Government & Civil Society-general		12814,79	13221,82	16161,04	18037,31	18842,35	18691,11	21449,44
I.5.b. Conflict, Peace & Security		10831,12	11298,9	12995,23	14099,19	14386,76	14849,74	17541,49
I.6. Other Social Infrastructure & Services		1792,02	1854,89	3014,05	3938,14	3816,14	3841,38	3907,95
<u>II. Economic Infrastructure & Services</u>		5075,75	5091,71	5487,36	6045,5	6943,7	5013,63	5296,4
II.1. Transport & Storage		15108,32	15807,86	19492,41	27468,02	25689,54	29047,57	27217
II.2. Communications		7262,61	7151,14	7614,79	13660,15	12976,71	13053,28	11901,98
II.3. Energy		476,88	461,64	566,04	430,07	623,78	453,54	688,07
II.4. Banking & Financial Services		4537,32	5130,4	6420,65	8020,78	6835,88	11029,75	9762,53
II.5. Business & Other Services		1690,54	1595,57	2793,68	3331,63	3738,71	2537,85	2672,83
<u>III. Production Sectors</u>		1140,98	1469,08	2097,27	2025,37	1514,45	1973,12	2191,51
III.1. Agriculture, Forestry, Fishing		7476,89	8089,91	8991,2	11294,61	12711,22	13408,96	14781,87
III.2. Industry, Mining, Construction		4567,16	4669,37	6713,66	7428,74	9357,11	9806,16	10583,63
III.3.a. Trade Policies & Regulations		2226,85	1941,44	1311,28	2739,79	1951,45	2175,36	2650,84
III.3.b. Tourism		546,24	1019,38	863,69	1056,51	1227,54	1280,95	1422,87
		136,65	459,7	102,52	71,79	174,81	146,52	124,54
<u>IV. Multi-Sector / Cross-Cutting</u>		7806,79	8568,96	10415,87	11906,52	13870,48	21074,35	17486,19
V. Total Sector Allocable (I+II+III+IV)		71712,76	78820,72	92995,55	112651,97	117725,33	127857,38	128140,63
<u>VI. Commodity Aid / General Prog. Ass.</u>		4756,59	4929,03	6100,63	10456,94	10099,44	6935,35	6514,66
VI.1. General Budget Support		3323,24	3113,07	4701,05	8130,29	7408,8	4985,27	4433,1
VI.2. Dev. Food Aid/Food Security Ass.		1338,48	1337,03	1382,4	2125,78	2252,75	1680,1	1570,94
<u>VII. Action Relating to Debt</u>		26052,79	23202,99	13752,73	11290,73	2747,37	5942,61	4521,16
<u>VIII. Humanitarian Aid</u>		9990,62	8501,81	8920,92	11002,64	11314,36	13372,61	12772,33
<u>IX. Unallocated / Unspecified</u>		9947,49	13589,91	11430,75	13184,18	12730,92	12137,95	15056,41
Total (V+VI+VII+VIII+IX)		122460,25	129044,46	133200,58	158586,46	154617,42	166245,9	167005,19

Source: OECD Creditor Reporting System.

With LDC IV Conference, a key milestone was achieved in placing tourism in the Aid for Trade agenda. Research and evidence in the LDCs, through the updated DTIS, highlighted that tourism was recognized as the key sector for the LDCs. However, in the report from OECD and WTO, prepared for the 4th Global review on Aid for Trade (*Connecting global firms to tourism value chains*), a somewhat surprising finding is presented: given the poverty impacts of Aft assistance on the tourism sector, the largest and growing share of tourism Aft has been flowing to upper middle income countries. Their share represented 37% of Aft flows to tourism in 2006 and 45% in 2011. Aft flows to LDCs have also increased over time, both in absolute and in relative terms, with their share increasing from 12 to 22%. Flows to low and middle income countries (LMICs) increased in absolute terms but went down in percentage terms. Instead, flows to other low income countries went down both in absolute and in relative terms.

Table 8. AfT tourism disbursements per DAC income group (US\$, thousand)

Group	Sum of disbursements						Percentage of disbursements					
	2006	2007	2008	2009	2010	2011	2006	2007	2008	2009	2010	2011
LDCs Least Developed Countries	6975	8880	9655	13083	48668	34300	12%	13%	10%	10%	31%	22%
LMICs Low and Middle Income Countries	17700	20448	28384	32949	47428	37128	30%	29%	30%	26%	31%	24%
MADCTs More advanced developing countries and territories	443	1669	585	501	368		1%	2%	1%	0%	0%	
Other LICs Other Low income countries	5367	3030	3364	1259	2739	2195	9%	4%	4%	1%	2%	1%
Part I unallocated by income	6169	7730	11939	23749	8225	11696	11%	11%	12%	19%	5%	8%
UMICs Upper middle income countries	21604	29018	41971	54599	47932	68710	37%	41%	44%	43%	31%	45%
Grand Total	58259	70775	95899	126140	155360	154029	100%	100%	100%	100%	100%	100%

Source: OECD Creditor Reporting System.

Note: The composition of country groupings is based on the DAC –groupings valid in 2011.

Overall, AfT disbursements to tourism have significantly increased over time and were around 160% higher in 2011 than in 2006. Yet these increases started from a very low base and disbursements to the tourism sector represented around 0.5% of total AfT disbursements in 2011. Taking into account that tourism represented on average around 4% of GDP in low income countries, the sector appears to be underrepresented when it comes to AfT flows. The potential of the sector deserves more accurate attention from the donors' community.

6. Conclusion

In 2012, over one billion tourists travelled the globe in a single year.

Over the past two decades, international tourist arrivals have more than doubled, from 473 million in 1992 to 1035 billion in 2012. By 2030, this number is forecast to go up to 1.8 billion, 57% of which will be from emerging economies as compared to 47% in 2012.

This is welcome news given the economic growth and development opportunities generated by the tourism sector. Tourism in 2012 represented 9% of the GDP, US\$ 1.3 trillion in exports around the globe and one in 11 jobs worldwide.

Every tourist means more jobs in tourism and related sectors, higher income for families, increased investment in infrastructure and opportunities for development. Tourism – among the top three sources of export earnings for nearly half of the world's LDCs – is proving to be one of the most effective ways to lift people over the poverty line and empower local communities. With the impressive growth in the level of tourism exports in LDCs in the period 2005-2012, the sector offers no doubt one of the more competitive opportunities for development.

Yet, for tourism to capture its potential as a development tool, a series of key competitive factors need to be put in place at national and international level.

At the national level, countries need to improve their tourism competitiveness in areas such as human resources, regulation, infrastructure or accessibility. Indeed, according to the 2013 edition of the World Economic Forum *Tourism and Travel Competitiveness Report*, the 49 LDCs rank the lowest in factors such as health and hygiene, tourism infrastructure, air transport infrastructure, ICT infrastructure, policy and regulations and human resources – all these should thus be priorities in building a more competitive sector in developing countries where tourism demand has been clearly growing in recent years. Another competitive factor to consider is that of visa facilitation, according to the UNWTO report *Visa facilitation: stimulating economic growth and development through tourism*. Africa is amongst the most closed regions in terms of tourism visas. In fact, only 8% of the world population does not require a visa to visit an African destination as compared to 31% for the Americas or 20% for Asia and the Pacific. It is thus central for developing countries destinations to commit to visa facilitation as a means to increase tourism flows.

For all of the above to happen, it is critical to see tourism placed higher in the development agenda and the level of development assistance match the potential that the sector has to contribute to development objectives.

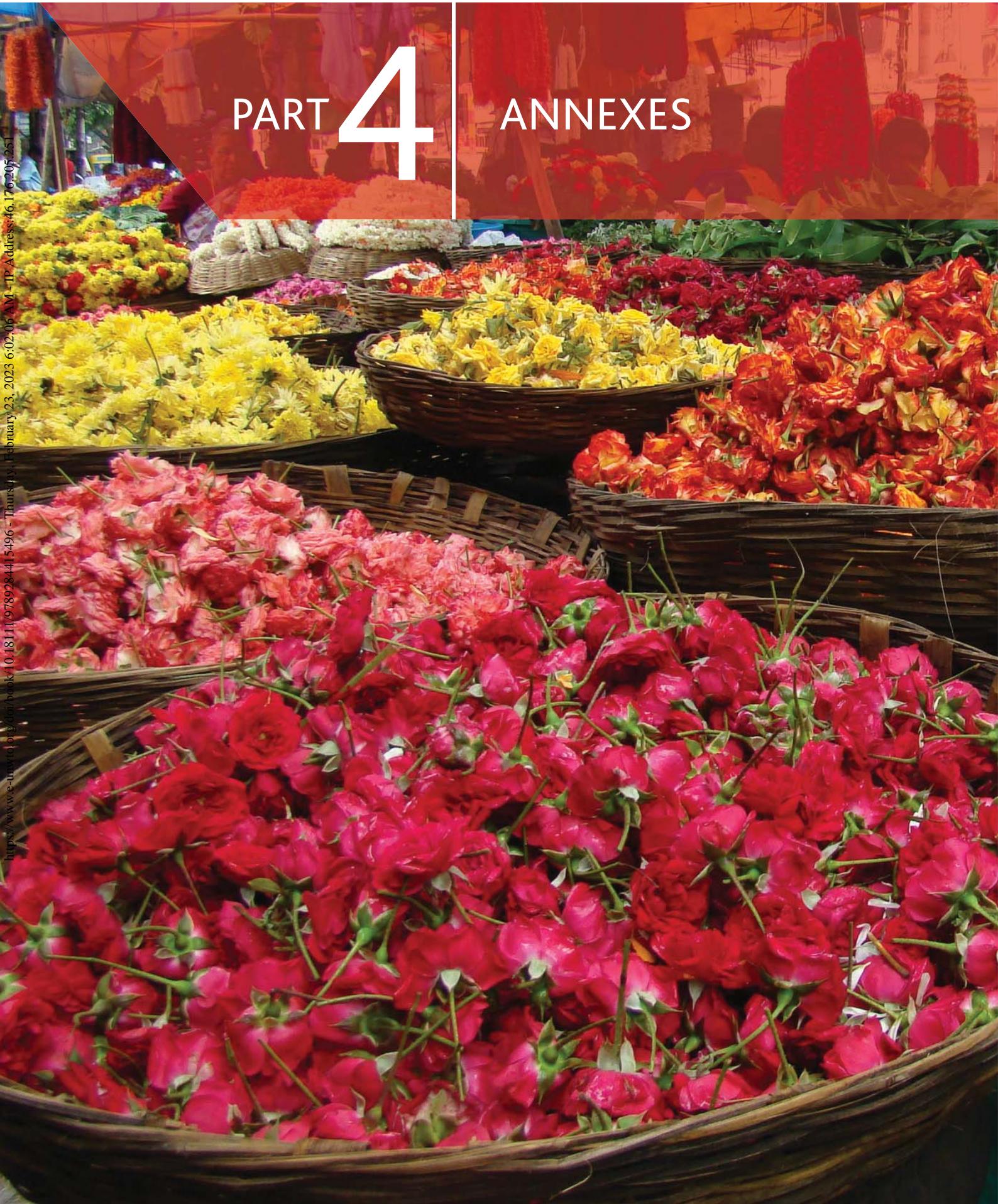
In fact, the potential of tourism for poverty alleviation and development has found reflection in the discussion around the Millennium Development Goals since 2002, notably in the context of the 2002 Johannesburg Summit on Sustainable Development.

In 2012, the significant contribution of tourism to the development goals was further recognized. Tourism was included in the RIO+20 outcome document *The Future We Want* as a thematic area and cross-sectorial issue that "...can make a significant contribution to the three dimensions of sustainable development, and having close linkages to other sectors, create decent jobs and generate trade opportunities..." .

In this same context, the commitment of the European Commission in the renewed framework for development stemming for Rio+20, sustainable tourism appears as an important sector for support, to achieve sustainable development in the Post 2015 Agenda, in the EC in its communication in February 2013 *Ending poverty and giving the world a sustainable Future*.

The post Rio+20 development agenda, the renewed partnership for development and the Busan Declaration in 2011 will hopefully lead to include more support for tourism from the international community in Aid Cooperation. The contrast between the potential of the sector in meeting development imperatives compared to only a 0.5% share of the global Aid for Trade and only 0.13% of the gross total in aid disbursements deserves more attention from the international community. When looking at result-based investment and aid efficiency, it is essential to give developing countries the capacity to fully gain from the benefits the tourism sector offers, to build a better life for all within a people's centered green development model.

PART 4 ANNEXES



ANNEX 1: Directory of Services

I. TOURISM GOVERNANCE AND STRUCTURE

Ensuring that the tourism sector is a major force for sustainable development requires a robust and integrated policy framework, and effective, accountable and democratic systems of governance that enable and encourage multi-stakeholder collaboration on tourism planning, development and management.

I. TOURISM GOVERNANCE AND STRUCTURE

- 1.01 Tourism Development Master Plans and Strategic Development Plans
- 1.02 Country Tourism Policy
- 1.03 Tourism Legislation and Regulation
- 1.04 Institutional Strengthening and Public Private Partnerships
- 1.05 Tourism Physical Planning and Resort Development
- 1.06 Quality Standards in Tourism Services
- 1.07 Practical Guidelines for Destination Quality Performance
- 1.08 Tourism Positioning in Development Planning and Strategies
- 1.09 Capacity Building Programmes in Tourism Development and Management
- 1.10 Capacity Building Practicum of Tourism Officials
- 1.11 Executive Training Programme
- 1.12 Capacity Development of Tourism Related Institutions - Government and Government Agencies
- 1.13 Destination Management Planning

1.01 Tourism development Master Plans and Strategic Development Plans

Objective:	Formulate a long-term development framework for tourism (10-20 years) with emphasis on policy and strategy, planning, institutional strengthening, legislation and regulation, product development and diversification, marketing and promotion, tourism infrastructure and superstructure, economic impact of tourism and tourism investment, human resource development, and socio-cultural and environmental impacts of tourism. It includes a short term (three-year) action plan for priority actions to be undertaken to kick-start sustainable tourism development, and preparation of several demonstration projects for pilot areas.
Methodology:	<p>Three phase approach:</p> <p>Phase I: Project formulation mission which analyses the current tourism scenario and prepares a project document (detailed terms of reference) for the formulation of a Tourism Development Master Plan.</p> <p>Phase II: Formulation of a Tourism Development Master Plan which focuses on the following sectors:</p> <ul style="list-style-type: none"> • transport; • accommodation; • tourist activities; • product development; • tourism zoning; • marketing and promotion; • institutional framework; • statistics and research; • legislation and regulation; and • quality standards of tourism services. <p>The Plan prioritizes actions for each sector and includes an Action Plan defining roles and responsibilities of various stakeholders, timelines, indicative budgets, monitoring guidelines, and success criteria.</p> <p>Phase III: Implementation of the Master Plan by providing technical assistance to the Government in implementing the priority recommendations of the Master Plan.</p> <p>Note: Tourism Development Master Plans can be formulated at a national or local level. Furthermore, they can also be thematic in nature:</p> <ul style="list-style-type: none"> • rural tourism; • community-based tourism; • mountain tourism; • coastal tourism; • ecotourism; and • spa tourism, etc.
Duration:	4-12 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations.
Outputs/ deliverables:	A Tourism Development Master Plan which provides an organized and structured framework for tourism development and promotion.

1.02 Country Tourism Policy

Objective:	Formulate a tourism policy to guide all tourism development, operations and management so as to meet the Government's immediate and long-term objectives for tourism. The policy, based on the principles of sustainability, is in line with international best practices to ensure the competitiveness of the national tourism sector within a regional and global scenario.
Methodology:	Formulated in six phases through a consultative approach involving all stakeholders. Phase I: Preparation of an Issues Paper which encompasses a detailed review and assessment of the current tourism scenario in the country, identifies policy constraints and challenges, and, identifies opportunities and benchmarks for the future growth of the industry. The issues to be addressed include: <ul style="list-style-type: none">• policy and strategy;• institutional strengthening;• legislation and regulation;• product development and diversification;• marketing and promotion;• economic impact of tourism and tourism investment;• tourism infrastructure and superstructure;• human resource development; and socio-cultural and environmental impacts of tourism. The Issues Paper is based on review of existing tourism policies, strategies and plans, and is finalized after exhaustive discussions with all stakeholders. Phase II: Organization of a series of regional workshops to disseminate the Issues Paper to regional public and private tourism stakeholders to ensure that current and future needs of the tourism sector have been well identified. Phase III: Formulation of a draft tourism policy. Phase IV: Organization of a National Forum to receive feedback from stakeholders on the draft tourism policy. Phase V: Finalization of the tourism policy based on consultative feedback. Phase VI: Formulation of an Action Plan to implement the policy recommendations.
Duration:	All phases are implemented under a composite project which can have a duration of 3 – 6 months.
Target beneficiaries:	National tourism administration, provincial governments, Destination management organizations.
Outputs/deliverables:	A tourism policy which identifies tourism as a key economic growth sector and guides its development over the long term.

1.03 Tourism Legislation and Regulation

Objective:	Formulate a tourism policy to guide all tourism development, operations and management so as to meet the Government's immediate and long-term objectives for tourism. The policy, based on the principles of sustainability, is in line with international best practices to ensure the competitiveness of the national tourism sector within a regional and global scenario.
Methodology:	<p>Identify the role of legislation in tourism development.</p> <p>Build consensus for tourism legislation through:</p> <ul style="list-style-type: none"> • consistency with National Development Policy; • consistency with National Tourism Policy; • review existing legal regulations governing tourism development; • review existing classification guidelines which affect the quality of existing tourism facilities and services and identify • gaps and constraints; • identify core legal issues; • identify stakeholder groups; • identify the range of legal tools available; • address issues of enforcement; • build in quality assurance and foster professionalism; and • facilitate business development. <p>Identify the roles and responsibilities of various government agencies, at central and local level, in tourism development.</p> <p>Organize a series of workshops at the regional level with all stakeholders to identify current gaps and constraints in legislation related to tourism planning, development, management and promotion.</p> <p>Based on the above, formulate a draft Tourism Law for the sustainable development, management and regulation of the tourism sector determining the rights and obligations of the Government in terms of protecting natural and cultural resources and tourism development and management; the rights and obligations of the industry suppliers; and the rights and obligations of the consumers.</p> <p>Organize a national conference to disseminate the draft Tourism Law to all stakeholders to obtain their feedback and endorsement.</p> <p>Formulate an implementation plan for the enforcement of the Tourism Law</p>
Duration:	3-6 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations, local communities and private sector.
Outputs/ deliverables:	A logical and well-defined legal and regulatory framework for tourism.

1.04 Institutional Strengthening and Public Private Partnerships

Objective:	Identify and clarify the present and future roles of the public and private sector organizations in tourism development of the country, and make improvements on operations of tourism associations and tourism boards.
Methodology:	<p>Through a series of workshops:</p> <p>Review the existing institutional and organizational structures of the tourism sector: public sector (including central and district level), private sector, and local communities.</p> <p>Review the current status of public-private partnership in tourism development, management and promotion of the country, including an assessment of current tourism organizations, associations and institutions.</p> <p>Provide recommendations on how to develop and adopt tourism development policies and strategies based on a participatory model for decision-making processes involving communication and coordination between public and private sectors.</p> <p>Raise awareness on the benefits and possibilities of public and private and community partnership in tourism development and provide best practice models which can be implemented in the local situation.</p> <p>Recommend improvements to the communication channels between public and private sectors in determining the needs of the industry to stimulate confidence and building of mutual trust as well as to increase the competitiveness of the tourism sector.</p> <p>Recommend new arrangements for the organization of the tourism sector, both in respect of public and private sectors, designed to deliver a more streamlined and co-ordinated approach based on informed guidance of the sector and effective public-private partnership. If needed, identify an implementing and coordinating body including its outline structure, roles and responsibilities and job descriptions for key positions.</p>
Duration:	3 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations, local communities and private sector.
Outputs/ deliverables:	Improved institutional framework for tourism development in the country and a public-private participatory model for decision and policymaking processes for tourism development, management and promotion.

1.05 Tourism Physical Planning and Resort Development

Objective:	Provide realistic and practical guidelines for the sustainable development of high quality tourism infrastructure and superstructure with a view to ensuring improved governance and management in the entire planning and development process.
Methodology:	<ul style="list-style-type: none"> Review and analyse the current situation of the tourism sector in terms of analysis of current and future tourism trends to the country; existing and potential tourism products; current capacity of supply of tourism services (accommodation etc.); accessibility and other existing and future infrastructure and utilities in the tourism zones; and existing Government tourism policies, strategies and plans, including policies related to urban planning and environmental management. Based on the above and through extensive field surveys, identify and determine tourism zones with their exact delineation and definition of boundaries, and formulate a set of recommendations on the type of tourism development for each zone depending on availability of land of different categories, accessibility, tourism services and future market trends. Identify the overall strengths and weaknesses of each tourism zone. Formulate a set of urban planning and facility development guidelines for tourism infrastructure development for the tourism zones. Select 3-5 priority tourism zones of different type and character and formulate area-specific guidelines for these zones based on conceptual structure plans, defining the recommended scale, type and character of the proposed tourism development in the zones and identifying areas for supporting facilities and other land uses. Develop a set of design guidelines for the main elements of each priority zone and illustrate them in terms of type, scale and character of the proposed development including landscaping, traffic and pedestrian environment. Identify a planning and development control system based on the existing institutional set-up and its main stakeholders to support tourism zones structure and development plans allowing planning authorities to exercise and maintain proper control over the type and spread of development, land use, urban design and built environment density, landscaping and landscape restoration, conservation of natural and cultural environments, and enforcement procedures against illegal and unauthorized construction and exploitation of natural resources. This ensures active involvement and participation of tourism facility planners, owners, operators and local community representatives from the selected tourism zones in the planning process through frequent consultations at the local level.
Duration:	3-6 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations, local communities and private sector.
Outputs/ deliverables:	Comprehensive general and area specific development guidelines for tourism zones with specific urban designing, land-use planning and infrastructure planning

1.06 Quality Standards in Tourism Services

Objective:	Improve the overall quality of products and services within the tourism industry (all tourism-related accommodation, restaurants, tour guides, tour operators, and other tourism-related service providers); raise the levels of demand nationally, regionally and internationally; promote competitiveness within the industry; and, provide valuable and reliable information on quality standards for the tourist and the travel industry.
Methodology:	<p>Overall strategy: evaluate the current tourism quality standards situation through initial negotiations with government officials and other key stakeholders of the national tourism industry; identify customers' needs and expectations (stakeholders, environment, direction, facilities, resources, overall objectives, challenges); introduce available quality products and services (modules); and, provide technical assistance as indicated in the modules below.</p> <p>Module 1: Review of Existing Criteria for Tourism-Related Accommodation Review existing criteria for various facilities and services and evaluate these according to local, regional and global best practices and competitive environment ; Identify gaps and constraints; Make appropriate recommendations on modifying and/or upgrading the existing criteria</p> <p>Module 2: Establishment and Formulation of New Criteria Identify for which facilities/services/sectors criteria need to be established; Formulate criteria in line with national/regional needs and considering international industry practices and competitive environment; Prepare initial criteria drafts; Introduce criteria drafts to industry stakeholders; Prepare final criteria and support the approval process</p> <p>Module 3: Implementation and Assessment of Criteria Establish assessment responsibilities and procedures (pre-post administration, on-site procedures, result reporting) ; Plan assessment/inspection tours; Accompany national assessors/inspector visits on site; Guide assessment findings and result definitions</p> <p>Module 4: Capacity Building of National Criteria Assessors/Inspectors Evaluate assessor/inspector capacities, knowledge and expertise levels; Identify gaps and constraints; Make appropriate recommendations for most suitable capacity building methods (on-site, off-site) ; Introduce "assessor certification" after successful attendance of respective capacity building sessions and/or on-site progress; Compile and provide assessment supporting tools (knowledge and reference manual, photo library); Develop "Train the Trainer" programme</p> <p>Module 5: Communication of Criteria Criteria launch press conference; Industry workshops for key tourism stakeholders (accommodation sector, owners, investors, tour operators, transportation companies, tourism related service partners); Presentations to high schools, hotel and catering schools</p> <p>Module 6: Criteria and Quality Control (Mystery Guest) Familiarization of criteria; Define controlling tools and methods (check-lists, documentation, reports, use of technology, etc.) ; Agree and establish control procedures (reservation, cost coverage) ; Plan time lines and execution.</p>
Duration:	Module 1: 1 month; Module 2: 3 months; Module 3: 6-12 months; Modules 4-6: 12-18 months. All modules can be undertaken as one composite project which spans 12-18 months depending on the nature and scope of the project
Target benefit.:	National tourism administration, provincial governments, private sector.
Outputs/ Deliverables:	Classification system in place and information available to stakeholders in the sector. Capacities built among local inspectors to apply classification criteria.

1.08 Tourism Positioning in Development Planning and Strategies

Objective:	Identify and clarify the roles of public and private sector organizations in the inclusion of tourism in development strategies at national and regional level. Build the overall capacity to identify and seize opportunities for the positioning of tourism in development frameworks by engaging proactively in strategy planning phases, and raising awareness on the benefits and possibilities of tourism development.
Methodology:	A series of workshops address the underlying issues of a systematic approach to positioning tourism as a part of development strategies through: (a) Revision of the current mention of tourism in relevant development strategies; (b) Assessment of the existing institutional and organizational structures of tourism sector participating in development planning and policy-structuring; (c) Recommendation on how to improve the communication and coordination among participating public and private sector organizations to integrally advocate the benefits of tourism as a development strategy; (d) Arrangements for delivering improved and long-term tourism positioning strategies.
Duration:	3 months
Target beneficiaries:	National tourism administration, other Ministries officials, provincial governments, destination management organizations, local communities, private and civil sector.
Outputs/ Deliverables:	Tourism and other public officials, private and civil sector members participating in the planning of development strategies understanding the importance of tourism, and having the 'know-how' for recognizing and seizing opportunities for positioning tourism in development policies and broader development agenda.

1.09 Capacity Building Programmes in Tourism Development and Management

Objective:	Provide intensive training in various disciplines of tourism development, management and promotion.
Methodology:	Series of intensive courses focused at both the central and provincial levels as well as to local communities on: <ul style="list-style-type: none">• tourism awareness: the social, economic and environmental impacts of tourism;• general management of the sector;• tourism development policy and product development;• implementation of tourism strategies: building strategic partnerships;• tourism marketing and marketing mix;• image development and management;• human resource development;• tourism legislation, regulation and classification schemes;• performance management and monitoring, optimization of impacts; and• pro-poor tourism policies, strategies and practical approaches to engage local communities and local industries in the tourism development and promotion process; and how to encourage sustainable and equitable employment opportunities through tourism. The courses are as participatory as possible with interactive working sessions and group exercises. The courses provide international, regional and local case studies and best practices which can be applicable to the local context and participants are also encouraged to bring reports and documentation from their own communities so that they can work on solutions during interactive break-out sessions.
Duration:	1 - 3 months (depending on the number of courses)
Target beneficiaries:	National tourism administration, provincial governments, local communities.
Outputs/ deliverables:	Improved capacities of government officials at the national and local level and local community members to develop, manage and promote tourism.

1.10 Capacity Building Practicum of Tourism Officials

Objective:	Improve the skills in the field of tourism marketing management (planning and evaluation) in the areas of strategic marketing planning; operational marketing; e-marketing; and evaluation of promotional activities.
Methodology:	Sessions will be conducted at two levels: a technical framework and a group discussion/debate. Topics covered: <ul style="list-style-type: none">• Developing a marketing strategy: from market research to the evaluation of marketing activities;• The definition of marketing objectives;• Market research: the starting point;• Market segmentation: a consumer- led tourism strategy;• Product development: a market oriented strategy or how to match markets / segments and products;• Positioning and branding: how to differentiate a destination in a crowded marketplace;• Operational Marketing: how to use the marketing tools in the most efficient manner;• E-marketing: how to build a successful e-marketing strategy; and• Measuring results: evaluating of NTO marketing activities and stakeholders accounting.
Duration:	3 days
Target beneficiaries:	Marketing professionals and managers with responsibilities in the field of tourism marketing, as well as those who work in different types of institutions such as: <ul style="list-style-type: none">• national tourism organizations;• national tourism administrations;• destinations management organizations;• tourism companies from all sectors; and• business associations of tourism activities.
Outputs/ Deliverables:	At the end of the seminar each group presents an outline of a marketing plan (detailed information/ guidelines provided for that purpose to all participants at the beginning of the workshop).

1.11 Executive Training Programme

Objective:	Study current tourism policies of each Member State and evaluate strengths and weaknesses; provide insights and broaden Member State policy options as well as opportunities on tourism policy making; formulate a more integrated tourism policy or model which can be utilized internationally by other Member States.
Methodology:	Co-organization with the National Tourism Administration of the Host Country. This training programme is designed to specifically focus on a more practical than theoretical implementation of tourism policy. Prior to discussing the possible options, a basic understanding of each Member State's policies needs to be addressed. The level of government officials participating in the programme should be Senior Tourism Directors (from the central Government organizations) or above. Each country should dispatch only one official to the programme, while it's possible to send more than one if the additional officials are self-financing for air tickets and accommodations.
Duration:	3 days workshop, plus 1 day technical tour
Target beneficiaries:	National tourism administrations
Outputs/ deliverables:	Tourism officials' understanding of the important role that tourism can play; "know-how" (how to manage rapid but sustainable and responsible tourism growth); and insights and broader policy options as well as opportunities on tourism policy making are provided.

1.12 Capacity Development of Tourism Related Institutions-Government and Government Agencies

Objective:	Capacity development of tourism related institutions (Government and Government Agencies)
Methodology:	<p>Successful capacity development interventions were led in several economic and social sectors in more than 70 countries, including LDCs. Capacity development is seen as the process through which individuals, organizations and societies obtain, strengthen and maintain the capabilities to set and achieve their own development objectives over time. Three points are identified where capacity is grown and nurtured: in an enabling environment, in organizations and within individuals. These three levels influence each other in a fluid way – the strength of each depends on, and determines, the strength of the others. Capacity development interventions would entail:</p> <ul style="list-style-type: none">- Participatory review of the methodology- Capacity needs assessment / development plan formulation- Capacity needs assessment / development plan validation- Capacity development plan implementation <p>Training programmes are provided. Typical interventions include organizational/process reviews, skill development, support to vocational institutions and capacity development measure for the management and implementation of tourism policies and programmes.</p>
Duration:	Depending on complexity / country context (6 months - 5 years)
Target beneficiaries:	Developing countries, Least Developed Countries, Post-conflict countries
Outputs/ deliverables:	Tourism related institutions capacity gaps and assets are mapped; Capacity of tourism related institution is strengthened through customized programs and solutions

1.13 Destination Management Planning

Objective:	To develop a medium to long term vision and action plan for the development, management and promotion of tourism in a well-defined destination, based on active collaboration between public, private and civil society organizations with a stake in tourism.
Methodology:	<p>Phase 1: Project formulation mission to define scope of the destination management plan. The initial mission will identify priority topics to be addressed and priority zones to be developed, bring key stakeholders together and formulate a work plan, including timeframe, expertise required and a budget, for the development of the plan in a participatory manner.</p> <p>Phase 2: Review, analysis and assessment of tourism resources and opportunities in the destination. This review will cover all aspects of tourism development in the destination, but with particular reference to conserving the heritage resources, strengthening the tourism supply chain, and encouraging multi-stakeholder collaboration for the development and promotion of tourism.</p> <p>Phase 3: Development of strategy and action plan</p> <p>The strategy, which will have a five to ten-year horizon, will consist of a vision for the future scale and nature of tourism in the destination, and a clear statement of strategic objectives and targets designed to deliver the vision. The action plan will be for two to four years and will provide guidance on topics as conservation of the cultural and environmental heritage, visitor management, physical planning, supply chain strengthening, enterprise development, institutional strengthening, capacity building and communications including marketing, local information provision for visitors and communication with tourism businesses and local communities. The action plan may provide the basis to establish a destination management organization in the area.</p> <p>The plan will conclude with a summary of recommended actions, identifying short and long term priorities, lead responsibilities, partners, indicative costs, potential funding sources, timings and milestones, performance measures.</p>
Duration:	3 – 6 months depending on the size of the destination and the scope of the topics to be covered
Target beneficiaries:	Tourism enterprises in the destination, and the public sector and civil society working in the field of tourism and sustainable development. Indirectly, disadvantaged groups in the destinations who may benefit from employment and income generating opportunities created through the development of tourism in the destination and the creation of new business linkages.
Outputs/ deliverables:	A destination management plan outlining the future development, management and promotion of tourism in the destination, with agreed upon roles, responsibilities and collaboration mechanisms of key stakeholders in the sector.

II. ECONOMIC PERFORMANCE, INVESTMENT AND COMPETITIVENESS

To be competitive, tourism needs to be integrated into a country's overall trade strategies. To be sustainable, the impact of tourism needs to be measured and monitored, and a reliable system of national tourism statistics needs to be developed. At the same time, investments should directly link to local SMEs, and improve synergies between tourism and other sectors such as agriculture and creative industries, if tourism is to be a driving force for sustainable development.

II. ECONOMIC PERFORMANCE, INVESTMENT AND COMPETITIVENESS

- 2.01 Statistical Strengthening and Development of a Tourism Satellite Account (TSA)
- 2.02 Statistical Strengthening
- 2.03 Sub-National Tourism Measurement and Analysis Assistance
- 2.04 Regional Statistical Capacity Building Programme
- 2.05 Development of Investment Policies on Tourism
- 2.06 Marketing and Promotion Plan
- 2.07 Capacity Building Workshop on Tourism Marketing Planning
- 2.08 Product and Services Development and Diversification
- 2.09 Tourism Product Development Seminar
- 2.10 Advanced Capacity Building Workshops on Risk and Crisis Management
- 2.11 Development of Integrated Trade Policy for Tourism
- 2.12 "Train for Trade" Programme: Building National Capacities on Sustainable Tourism for Development
- 2.13 Scheduling GATS Commitments: WTO Assistance and Training
- 2.14 Aid for Trade
- 2.15 Training Negotiators for Trade in Services (tourism)
- 2.16 Tourism Sector diagnostics, including Diagnostic Trade and Integration Studies (DTIS)
- 2.17 Facilitation of Demand – driven Business Linkages between Agri-foods, Creative Industries and service providers and the Tourism Industry
- 2.18 Supply Capacity Building and Quality of Products and Services to Meet Market Requirements
- 2.19 Supply Chain Engagement for Tour Operators
- 2.20 e-Tourism: fostering destination and tourism SMEs competitiveness through an ICT-centric networking
- 2.21 Tourism Business Development

2.01 Statistical Strengthening and Development of a Tourism Satellite Account (TSA)

Objective:	Facilitate the understanding of the full social and economic dimension of tourism in terms of demand (international and domestic arrivals, characteristics of their visits, and their consumption of goods and services) and supply (characteristics of local industries involved in tourism and details of their production and use of labour and capital), thereby guiding tourism policy and planning while providing a useful lobbying tool to National Tourism Administrations to advocate the cause of tourism.
Methodology:	Two phase approach: Phase I: Evaluation Mission to undertake a detailed assessment of the current status of collection and analysis of tourism-related statistics on the demand and supply side, identify gaps and constraints as well as make recommendations for inter-institutional collaboration for tourism-related statistics and economic data (national tourism administration, national statistical office, central bank and immigration authorities). Phase II: Long-term project focusing on either strengthening the entire system of tourism statistics including capacity building and/or developing an experimental TSA depending on recommendations of the Evaluation Mission.
Duration:	Phase I: 10 days Phase II: 1-3 years
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations.
Outputs/ deliverables:	A regular, competitive and reliable source of tourism statistics and related economic and social data (including information on employment generated by tourism). Capacities built among staff of NTA, National Statistical Office, Central Bank and Immigration Authorities to collect and process tourism-related statistics.

2.02 Statistical Strengthening

Objective: Improve the knowledge of:

- (i) the measurement of international trade in services according to the concepts of the new Manual on Statistics of International Trade in Services;
- (ii) the links between trade in services statistics and the GATS; and
- (iii) compilation practices, available services data sources and tools for trade in services analysis.

At the end of the activity, participants have agreed on a first set of recommendations for establishing an appropriate system to measure trade in services according to their possibilities.

Methodology: National Seminars on Statistics of International Trade in Services

Duration: 2-4 day seminars, depending upon requirements

Target beneficiaries: Developing countries

Outputs/ deliverables: Statistical strengthening

2.03 Sub-National Tourism Measurement and Analysis Assistance

Objective:	Provide guidance on developing tourism policy oriented measurement and analysis projects at sub-national levels, in a way that is consistent with the United Nations International Recommendation for Tourism Statistics 2008 (IRTS 2008) and Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008). By adapting these international recommendations - primarily valid for the national level – to the sub-national level, such project guidance focuses on the key topics of examining flows of visitors, the relationship between tourism and territory, and economic contributions.
Methodology:	Focusing on the above topics and in mutual agreement with the contracting party, technical assistance may consist of either or all of the following options (which may involve one or more expert missions): Option 1: Assistance in project formulation Consists of one or more of the following, mostly cumulative, services: <ul style="list-style-type: none">• exploring needs and first assessment;• evaluation of (parts of) previous project(s);• general project plan: basic core of guiding specifications;• tailored project plan: adaptation of the general project plan to a given situation/territory; and• drafting of a project's call for tender. Option 2: Assistance in project execution Involves the implementation of (parts of) a project and/or its monitoring and evaluation.
Duration:	Option 1: 1 week - 1 month Option 2: 3 months - 1 year
Target beneficiaries:	National tourism administration, provincial and local governments or agencies, destination management organizations.
Outputs/ Deliverables:	Reliable and fundamentally impartial definition and execution of projects that are increasingly relevant for designing evidence-based tourism policy at the sub-national level. Capacity built among target beneficiaries on tourism measurement and analysis at the sub-national level.

2.04 Regional Statistics Capacity Building Programme

Objective:	Strengthening national experts' capacity to develop their Systems of Tourism Statistics through the implementation of the UN ratified <i>International Recommendation on Tourism Statistics 2008</i> (IRTS:2008) and <i>Tourism Satellite Account: Recommended Methodological Framework 2008</i> (TSA:2008)
Methodology:	<ul style="list-style-type: none">• Series of three or four Workshops hosted by a country in each region which is considered to be the most advanced or most determined in terms of the development of tourism statistics. Each Workshop takes two, three or four days and is organized in a structured manner with harmonized support material to guide countries in better understanding the current status of their national Systems of Tourism Statistics (STS) so as to be able to design the way forward for its further development and, if relevant, the development of a relevant and accurate Tourism Satellite Account (TSA).• Regional Seminar: The main purpose of the Seminar is to spread the experience and knowledge gained by the Workshop participants during the SCBP to other countries in the region.
Duration:	18 - 24 months (workshop are held at intervals of approximately six months and last from 2 to 4 days; the Seminar lasts 2 days and is held at the end of the final workshop).
Target beneficiaries:	Participating countries are invited to send three delegates, i.e. one person from each of the National Tourism Administration, the National Statistics Office and the Central Bank.
Outputs/ deliverables:	Incremental development of national capacity in tourism statistics through a series of practical regional workshops + seminar.

2.05 Development of Investment Policies for Tourism

Objective:	Enhance the capacity of LDC governments to promote domestic investment and attract foreign direct investment (FDI) in the tourism economy.
Methodology:	Advisory services on investment promotion policy and strategy. Direct support to policy makers toward investment-friendly regulations and guidance to potential investors in the tourism economy. Advisory to domestic tourism sector to qualify for FDI and joint ventures.
	Using existing national investment promotion policies as the starting point, together with relevant information from national development plans and other relevant documentation, participants will be trained to identify gaps and weaknesses in current policies. Workshop participants will then jointly create an Action Plan for Tourism Investment Policies. (Ministry of Tourism, Tourism Board), Private Sector (Hotel and Tour Operator Associations)
Duration:	6 months
Target beneficiaries:	Relevant national policy-makers.
Outputs/ deliverables:	Action Plan for Tourism Investment Policies.

2.06 Marketing and Promotion Plan

Objective:	Formulate a detailed marketing and promotional plan for the sector taking into account the quality and quantity of tourism products, the diversity of domestic, regional and international source markets, image and positioning, branding, quality and distribution of promotional materials (including e-marketing) and institutional mechanisms for marketing and promotion including public-private partnership.
Methodology:	<ul style="list-style-type: none"> • Review and assess the current quality and standard of the country's tourism product, both existing and potential, in terms of its diversity (natural, cultural, recreational). • Analyse past and present tourist patterns to the country and conduct several visitor surveys at key locations and assess the current domestic, regional and international image of the country as a tourism destination. • Develop profiles of the short, medium and long term prospective source markets and segments within those markets that can be attracted to the country. Set arrivals and accommodation requirements targets by five year periods by type, category and segment from international and domestic source markets. • Evaluate and assess the current marketing and promotional programmes in the country including promotional materials produced, their distribution channels, as well as electronic marketing techniques. • Review the existing institutional framework for marketing the country as a tourism destination, and identify and recommend organizational changes required to ensure the effective implementation of the marketing strategy involving strong public-private partnership. • Prepare a medium and long-term marketing strategy including recommendations for destination branding and identification of the financial and technical resources required to implement the strategy. • The overall marketing strategy will include a detailed short-term marketing and promotional programme for the first five years, outlining activities, targets and cost estimates on a yearly basis.
Duration:	1 - 3 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations, local communities and private sector.
Outputs/ deliverables:	Strategic positioning of the country as a tourism destination and identification of tourist patterns and priority source markets and segments.

2.07 Capacity Building Workshop on Tourism Marketing Planning

Objective:	Improve the skills in the field of tourism marketing management (planning and evaluation) in the areas of strategic marketing planning; operational marketing; e-marketing; and evaluation of promotional activities.
Methodology:	Sessions will be conducted at two levels: a technical framework and a group discussion/debate. Topics covered: <ul style="list-style-type: none">• Developing a marketing strategy: from market research• to the evaluation of marketing activities;• The definition of marketing objectives;• Market research: the starting point;• Market segmentation: a consumer- led tourism strategy;• Product development: a market oriented strategy or how to match markets / segments and products;• Positioning and branding: how to differentiate a destination in a crowded marketplace;• Operational Marketing: how to use the marketing tools in the most efficient manner;• E-marketing: how to build a successful e-marketing strategy; and• Measuring results: evaluating of NTO marketing activities and stakeholders accounting.
Duration:	3 days
Target beneficiaries:	Marketing professionals and managers with responsibilities in the field of tourism marketing, as well as those who work in different types of institutions such as: <ul style="list-style-type: none">• national tourism organizations;• national tourism administrations;• destinations management organizations;• tourism companies from all sectors; and• business associations of tourism activities.
Outputs/ deliverables:	At the end of the seminar each group presents an outline of a marketing plan (detailed information/ guidelines provided for that purpose to all participants at the beginning of the workshop).

2.08 Product and Services Development and Diversification

Objective:	To facilitate the involvement of local disadvantaged people in the development of new and improved tourism products and services in existing tourist destinations as well as in new areas that are opened for tourism development.
Methodology:	<p><i>A six phase approach:</i></p> <p>Phase I: Product – Market Analysis, to identify possible new and improved products that local people can deliver to existing and new markets.</p> <p>Phase II: Selection of tourism products and services to be delivered by the local people, including handicrafts, and other creative industries products and cultural services, meals, accommodation and excursions, e.g. along new trails. The selection takes place in close consultation and collaboration with the private sector.</p> <p>Phase III: Prepare detailed product development plan, including investment requirements for the short, medium and long-term.</p> <p>Phase IV: Plan and organize intensive training courses for local people on the skills required to develop, manage and market the products and services.</p> <p>Phase V: Invest in the facilities required to build up the products and services, e.g. signage, visitor centres, handicraft equipment, cooking equipment. Matching grants or micro credits might be made available to facilitate the investments. Create sustainable linkages structure between demand of products and services and providers.</p> <p>Phase VI: Promotion of products, specifically targeting tourists and tour operators with a key interest in the local product and service offer and the destination.</p>
Duration:	12 - 36 months
Outputs/ deliverables:	New and improved tourism products and services consumed by tourists, generating employment and income for local people.

2.09 Tourism Product Development Seminar

Objective:	Provide participants with the fundamentals and principles of tourism product development and steps involved in the tourism product development process (based on the European Travel Commission and Handbook on Tourism Product Development).
Methodology:	<ol style="list-style-type: none">1. Presentations by tourism experts and NTO/NTA representatives2. Best practice case studies3. Expert panel discussions
	Topics covered: <ul style="list-style-type: none">• Fundamentals and principles of tourism development;• Steps in the tourism product process;• Tourism product development - model approach and variations;• Innovation and product development;• Product development in a destination context; and• Case studies
Duration:	2 days
Target beneficiaries:	National tourism administration, governmental bodies, local government, private sector/business association, non-governmental organizations, university/ research institute, local destination management organizations.
Outputs/ deliverables:	New ideas on product development; possibility to see and compare the approach and solutions of others to the same topic; and networking opportunities.

2.10 Advanced Capacity Building Workshops on Risk and Crisis Management

Objective: Provide in-depth knowledge and up-to-date techniques in thematic areas in order to strengthen the tourism sectors' capacity at the national and regional level.

Methodology: These workshops deepen the understanding in the following specific thematic areas:

- emergency planning for tourism;
- tourism risk analysis, early warning and mapping;
- crisis coordination at the national and international level;
- set-up and management of crisis centre;
- crisis communications (traditional and new media);
- tourism and mobility & safety; and
- tourism and health risks.

In an interactive but also didactic way, international and national experts train the participants and share current techniques and best practices from the international level.

Duration: 2 days per theme / workshop.

Target beneficiaries: National tourism administrations, national tourism organizations, civil protection authorities, officials from Ministries of interior-, foreign affairs, as well as the health and private sector.

Outputs/ deliverables: Prepare for and support risk and crisis management efforts at national level, and capacity building.

2.11 Development of Integrated Trade Policy for Tourism

Objective:	To assist Members States and other relevant stakeholders in developing and strengthening tourism related services by establishing adequate regulatory and institutional frameworks; supporting national services assessment and policy reviews; giving attention to multilateral rule-making in services; fostering recognition of qualifications and standards; and providing support to multilateral and regional negotiations on services.
Methodology:	Tourism policy research: seeking to enable policy makers and other stakeholders in tourism related services by providing state of the art analysis on the impact of tourism on trade and development and identifying policy options to strengthen regulatory and institutional frameworks as well as supply side capacities; Advisory Services: providing policy and legal advice to governments regarding multilateral, regional and national tourism related negotiations and in the implementation of trade related agreements. These services also include assisting countries in the design of their own Services Development Strategies through the production of National Services Policy Reviews.
Duration:	From one to four year cycles depending on the project and activity.
Target beneficiaries:	All relevant stakeholders involved in tourism services policy making. Stakeholders include governments (Ministries of tourism, trade, transport, foreign affairs and sectoral regulatory agencies), business representatives (industry associations and SMEs), academia (teachers and experts in the field) and civil society organisations (consumer, environmental and labour groups).
Outputs/ Deliverables:	Background notes: In response to Members States' request, targeted analysis on the economic and social contribution of the tourism sector to development has been done; Policy brief to negotiators: These briefs provide policy and legal analysis regarding the negotiating context, positions and potential opportunities and risks for developing countries in trade negotiations, including tourism services. In most cases these briefs are of confidential nature; National Services Policy Reviews: These reviews are demand driven and tend to cover tourism services and other key related services such as transport and financial services. They seek to address several key factors for the development of tourism services including the existence of an adequate enabling environment, the availability of an adequate policy, regulatory and institutional framework, and the identification of potential bottlenecks within the supply chain. The Reviews also provide countries and other stakeholders with a series of policy recommendations and potential actions on how to expand their supply side capacities and benefit from trade; Benchmark tools: A methodology has been developed in order to assess and improve the levels of sustainability of tourism services across countries. This methodology includes several steps such as identification of the dimension (economic-socio ecologic and infrastructure), indicators, methods for scaling up and chart of systems representation.

2.12 "Train for Trade" Programme: Building National Capacities on Sustainable Tourism for Development

Objective:	To build national capacities to support the development of a sustainable tourism sector. To foster collaborative mechanisms among all actors of the tourism value chain.
Methodology:	<p>TrainForTrade is a demand-driven programme which aims to strengthen national and local capacities and foster ownership in the field of sustainable tourism for development. TrainForTrade makes its capacity-development expertise available to tourism authorities, private sector and civil society. Its main features are:</p> <ul style="list-style-type: none"> - A comprehensive approach: TrainForTrade projects are integrated processes, using training, advisory services and technical assistance to accompany developing countries towards sustainable tourism. - Multi stakeholder dialogue and participative decision processes: The TrainForTrade programme serves as a facilitator in policy dialogues and decision-making processes at national and local levels. It contributes to enhance the importance of consultation and ownership for key decisions on tourism. - Networking and sharing of best principles: The learning techniques enable participants to exchange experiences and best practices during the face-to-face seminars, study tours fostering South-South cooperation or through the TrainForTrade distance learning platform. These activities stimulate the creation of national and local training capacities and of formal and informal networks on sustainable tourism.
Duration:	Minimum of two years.
Target beneficiaries:	Sub-regional: regional organizations; National: relevant Ministries and institutions dealing with tourism issues; Local: provincial governments; municipalities; and communities; Private sector; Civil society.
Outputs/ Deliverables:	<ul style="list-style-type: none"> - National studies to assess sustainable tourism needs, potential and bottlenecks in the priority regions and provinces, providing a review of on-going activities and avenues for synergies as well as a multi-year capacity development proposal. - A customized training package on sustainable tourism for development combining local knowledge with state-of-the-art expertise and encompassing modern training technologies such as distance learning (available for national and sub-national government officials). - Advisory services for the implementation of multi-stakeholders' dialogue both at the governmental level (inter-ministerial committees) and at the national-regional-local level (multi-level mechanisms). - A dedicated electronic platform to support national and international networks in the field of sustainable tourism. - Trained country teams able to devise, manage and roll-out training activities, both through traditional and distance learning format, at the local level in an autonomous fashion. - A customized training package for local governments, NGOs, local actors and communities for the design, implementation and partnership-building for small-scale projects having a developmental impact and based on sustainability criteria. - Guidelines for the formulation of small-scale sustainable tourism projects for national and local stakeholders. - Transnational activities for knowledge transfer, partnership-building and sharing of best practices, such as ad-hoc regional and interregional study-tours.

Products are available in four languages: English, French, Portuguese and Spanish.

2.13 Scheduling GATS Commitments: WTO Assistance and Training

Objective:	WTO's Trade-related technical assistance (TRTA) activities and programmes are geared towards sustainable trade capacity-building in beneficiary countries.
Methodology:	<p>National Seminars on Scheduling GATS commitments</p> <p>Technical assistance and training are core elements of the development dimension of the Multilateral Trading System, as confirmed by Ministers at <u>Doha</u> (December 2001). This was again underlined and further strengthened at the Ministerial Conference in <u>Hong Kong, China</u> (December 2005).</p> <p>Within the WTO Secretariat, TRTA is coordinated by the Institute for Training and Technical Cooperation (ITTC), based on the technical assistance and training plans (the TA Plans). The <u>Committee on Trade and Development</u> is the regular body overseeing all TRTA activities.</p>
Duration:	2-4 day seminars, depending upon requirements
Target beneficiaries:	Developing countries
Outputs/ deliverables:	Capacity development for scheduling GATS commitments.

2.14 Aid for Trade

Objective:	Aid for Trade aims to help developing countries, particularly least-developed countries, develop the trade-related skills and infrastructure that is needed to implement and benefit from agreements and to expand their trade.
Methodology:	Encourage additional flows of Aid for Trade from bilateral, regional and multilateral donors to support requests for <u>trade-related capacity building</u> from beneficiary countries ; support improved ways of monitoring and evaluating the initiative; encourage mainstreaming of trade into national development strategies by partner countries. The <u>Enhanced Integrated Framework</u> is the main mechanism through which least-developed countries access Aid for Trade. The <u>Standards and Trade Development Facility</u> maintains close contacts with the Aid for Trade initiative. It complements this global scheme through projects and monitoring of aid flows at an operational, issue-specific level.
Duration:	Depending upon the nature and scope of the project.
Target beneficiaries:	Developing countries
Outputs/ deliverables:	The <u>Aid-for-Trade Work Programme 2012-2013</u> , issued on 15 November 2011, is based on the theme "deepening coherence" and focuses on five key areas: resource mobilization, mainstreaming of trade into development plans and programmes, regional trade integration, private sector development, and monitoring and evaluation of Aid for Trade. The Work Programme aims to promote deeper coherence and an on-going focus on Aid for Trade among the trade and development community, notably on showing results, which will generate continued impetus to the implementation process. It includes a calendar of meetings, culminating in a Fourth Global Review of Aid for Trade envisaged for 2013.

2.15 Training Negotiators for Trade in Tourism Services

Objective(s):	To assist Members States and other relevant stakeholders in developing and strengthening tourism related services by giving attention to multilateral rule-making in services and providing support to multilateral and regional negotiations on services.
Methodology:	Negotiators from developing countries are supported in understanding potential implications and in advancing their interests in key multilateral, regional and bilateral trade negotiations (e.g. tourism services in the WTO GATS negotiations and European Partnership Agreements). Countries requesting accession to the WTO are supported in the preparation/negotiations of their accession protocol and in implementation of WTO Agreements. Training sessions are backed with targeted analysis, training modules, simulations and sectorial studies.
Duration:	One week.
Target beneficiaries:	Competent Governments agencies: Ministries of tourism, trade, transport and foreign affairs, sectorial regulatory agencies, and missions on Geneva. Depending on the case they can also involve regional UN economic commissions as partners. Other stakeholders can also participate if they are included in the governmental delegation.
Outputs/ Deliverables:	Policy brief to negotiators: These briefs provide policy and legal analysis regarding the negotiating context, positions and potential opportunities and risks for developing countries in trade negotiations, including tourism services. In most cases these briefs are of confidential nature; Training modules: Several training modules tools have been developed to assist negotiators, policy makers and other relevant stakeholders to better understand the negotiating context and prepare their national position for multilateral, regional and national tourism related negotiations. For example an advanced training module on the WTO General Agreement on Trade in Services has been developed as well as a specific simulation on negotiations on tourism services within trade agreements.

2.16 Tourism Sector Diagnostics, including Diagnostic Trade and Integration Studies (DTIS)

Objective:	Tourism sector reviews are integrated in Diagnostic Trade Integration Studies (DTIS)
Methodology:	The paramount objective of the DTIS exercise is to identify a series of unequivocal facts and issues that are hampering the integration of least-developed countries (LDCs) into the Multilateral Trading System (MTS) and the mainstreaming of trade issues in the PSRPS.
	Thirty-five countries conducted DTIS between 2001 and 2009. Of these, 30 (86 percent) included a specific section dedicated to tourism (see Annex 1). The presence of a tourism section or chapter in a DTIS is a reliable indication that the development of the tourism sector is a national priority. The recommendations in the DTIS action matrix detail the prioritized interventions to be pursued by the government. The matrix also highlights areas that require the support of development partners to achieve results. The analysis is country-specific and accounts for endogenous factors relevant to tourism development, such as transport infrastructure and services, capacities, backward business linkages, country image, marketing strategy, and social and environmental sustainability.
Duration:	DTIS process usually takes 6-12 months
Target beneficiaries:	Least Developed Countries (LDCs)
Outputs/ deliverables:	Action oriented tourism sector diagnostic; Recommendations for the development of the Tourism Sector are part of DTIS.

2.17 Facilitation of Demand-driven Business Linkages between Agri-foods, Creative Industries and Service providers and the Tourism Sector

Objective:	Create sustainable backward linkages between micro producers and service providers and the tourism sector (hotels, restaurants, tour operators). Marginalised local producers and service providers respond to the demand requirements for locally sourced products as fruits, vegetables and handicraft and other creative industries products and services (e.g. cultural tourism tours, music and dance performance) related to the tourism value chain.
Methodology:	<ul style="list-style-type: none">- Analysing the procurement patterns of hotels, resorts, restaurants and tour operators in order to understand how they can be linked to local communities and small scale producers and service providers.- Hold consultations with existing tourism enterprises to identify their product and services requirements in terms of quantity, quality and consistency as well as to better understand the private sector's motivation to engage in such business linkages.- Conduct sensitisation and information exchange workshops between the tourism sector and potential suppliers of products and services to reach a common understanding on demand requirements and the nature of envisaged cooperation (e.g. corporate social responsibility motives or purely profit driven cooperation)- Facilitate match-making exercises where mutually beneficial business backward linkages have been identified.- Establish linkages between tourism sector and micro producers of requested products and services.
Duration:	-24-36 months
Target beneficiaries:	Domestic small scale producers and service providers along the tourism value chain and their support organisations as well as its tourism support network.
Outputs/ deliverables:	Established sustainable business backward linkages between the tourism sector and local producers of agri-foods and/or creative industries and services.

2.18 Supply Capacity Building and Quality of Products and Services to Meet Market Requirements

Objective:	Building of supply capacity and related quality enhancement to ensure that agri-food producers, hotels, service providers (tour operators, music and dance groups) and/or creative industries producers can successfully meet market requirements of the tourism sector in the country.
Methodology:	<ul style="list-style-type: none">- Building supply capacities of local producers and communities in one or more or the following to meet market requirements: Product and service development; Efficient procurement; Improvement of the production processes; Quality assessment;; Upgrading of marketing and negotiation skills; Access to finance; General management and business skills.- Building capacity of hoteliers and hotel staff in hospitality management, in order to meet demand of international tourists, and additionally in environmental management.- Workshops or training activities will be organised in priority with local and/or at times with international consultants and in collaboration with private sector partners and institutions in order to ensure content quality.
Duration:	24-36months
Target beneficiaries:	Hoteliers, Tour operators, local micro and small enterprises/farmers producing products and services in demand by the tourism industry in the country.
Outputs/ deliverables:	Micro and small enterprises/farmers meeting the demand requirements by existing tourism enterprises in terms of quantity, quality and consistency of product or service delivery, and hotels meet international standards.

2.19 Supply Chain Engagement for Tour Operators

Objective:	To integrate sustainability into the tourism supply chain in tour operators operations.
Methodology:	Working towards sustainability goals requires working in partnership with suppliers to develop a sustainability policy. This then requires working to support suppliers as they seek to meet these goals.
Module 1	<ul style="list-style-type: none">- The costs and benefits of developing a sustainable supply chain.
Module 2	<ul style="list-style-type: none">- Creating a company policy- Baseline assessment of suppliers- Preparation and implementation of an action plan<ul style="list-style-type: none">o Defining goals, actions and a set of targets (standards and criteria)o Getting the word out (internal training)o Putting the plan into actions
Module 3	<ul style="list-style-type: none">- Monitoring and reporting on progress<ul style="list-style-type: none">o Creating and implementing a monitoring systemo Reporting on performance
Module 4	<ul style="list-style-type: none">- Raising awareness and communicating sustainability to suppliers<ul style="list-style-type: none">o Promoting good practice (e.g. incentives, verification)
Duration:	Depends on the level of sustainability knowledge.
Target beneficiaries:	Tour operators and tourism suppliers.
Outputs/ deliverables:	Integration of sustainability into the tourism supply chain through the adoption of best practices

2.20 e-Tourism: Fostering Destination and Tourism SMEs Competitiveness through an ICT-centric networking

Objective:	Foster the adoption of ICT in tourism policies and to initiate actions to be taken to gather, around I.C.Ts collaborative schemes, public and private stakeholders, including SMEs; build consensus on e-business tourism solutions and equip key public and private stakeholders with required behavioural, organizational and technological tools; promote strategic cooperation and partnerships in e-tourism; foster destination and SMEs' competitiveness.
Methodology:	<p>Support for multi-stakeholder concentration for a consensual and inclusive promotion of local tourism assets, through ICTs;</p> <p>Technical assistance: Capacity building activities include Analysis of the digital footprint of targeted destinations; training of high-level public officials and private decision makers; technical advice and support; organization of workshops and specialized seminars;</p> <p>Provision of pedagogical guides and tools, including the Open Source System (FOSS) UNCTAD Data collector tool and the Electronic Tourism Platform (ETP) Open Source System prototype: guides and teaching tools, visual aids;</p> <p>Participative approach. Case studies; Simulation exercises, best practices, role play, facilitation of group work, interactive discussions;</p> <p>Formulation of action plans;</p> <p>Setting-up of and support to local follow-up committees to foster networking and ICT collaborative schemes and implement agreed actions;</p> <p>Integration of feed-back from early beneficiaries into e-tourism deliverables.</p>
Duration:	Minimum 2 years.
Target beneficiaries:	Policy makers; public and private decision makers and senior staff of various ministries and tourism institutions: National Tourism Office, Tourism Boards; relevant government agencies, Federations and professional associations for the promotion of tourism and crafts, local operators, and in the broader sense, the representatives of the tourism business community.
Outputs/ deliverables:	<p>Key products include:</p> <p>Swot analysis and Internet footprint of the beneficiary destination;</p> <p>Customized pedagogical modules: Module 1: Benefits of ICTs for destinations, Web techniques and tips. Module 2: Building Public-private partnerships around I.C.Ts and best practices. Module 3: Positioning and marketing techniques to promote a destination on the Web, including Web 2.0 and social networking techniques Module 4: Destination management models and sample of I.C.T applications. Module 5: Mastering the UNCTAD Free Open Source System Data Collector and Electronic Tourism Platform. Each module is composed of a) the participant's guide, b) the presentations slides, c) questionnaires to assess the methodology and impact of the training material, as well as various annexes and background documents. Related documentation is available a) in paper and b) in CD format (in the shape of a mini web site with PDF files, and software) distributed to each participant of both workshops. An on-line survey mechanism to adapt the assistance package to local expectations and needs as well as to follow-up on outcomes; The Free Open Source System software: <i>Data Collector</i> developed by UNCTAD (delivered within the package) which allows tourism standardized data gathering, and synchronisation with the Content Management System (OpenCMS) of the Electronic Tourism Platform. The Electronic Tourism Platform functional FOSS prototype as a first step towards a Destination Management System.</p>

2.21 Tourism Business Development

Objective:	Building upstream and downstream tourism linkages.
Methodology:	Makes use of the national tourism master plan as the centre-piece, together with relevant information from national development plans and cluster- and value-chain analyses where available. Develop in close cooperation with local private and public sector stakeholders inclusive tourism opportunity assessment.
	Validate findings and recommendations in validation roundtable with all relevant tourism sector stakeholders. Sensitize participants to thoroughly analyse current and potential opportunities for both upstream and downstream tourism linkages, and train to jointly create a project action to develop feasible tourism-related opportunities.
Duration:	6 months
Target beneficiaries:	Relevant national policy-makers, private sector stakeholders (supply side sector associations, domestic tourism sector stakeholders)
Outputs/ deliverables:	Action Plan for Tourism Business Development.

III. EMPLOYMENT, DECENT WORK AND HUMAN CAPACITY

As a labour-intensive sector, tourism offers opportunities for job creation for a range of skilled and low-skilled labour, including women, youth and disadvantaged groups. Tourism generates both direct and indirect employment, and requires careful planning of human resources at all levels to ensure a sufficient supply of suitably skilled labour to meet future growth.

III. EMPLOYMENT, DECENT WORK AND HUMAN CAPACITY

- 3.01 Manpower Planning for the Tourism Sector
- 3.02 Capacity Building Programmes in Hospitality, Skills and Tourism Business Development
- 3.03 Skills Development, Education and Vocational Training, On-the-job Training and Increase of the Quality of Services
- 3.04 Strengthening Decent Work
- 3.05 Strengthening the Role of Women in Tourism
- 3.06 Training Needs Analysis for a Destination

3.01 Manpower Planning for the Tourism Sector

Objective:	Build up highly qualified and well trained human resources in the public and private sectors to develop, manage and serve the industry in a sustainable and competitive manner in accordance with international standards.
Methodology:	<p>Two phase approach:</p> <p>Phase I: Review the Government's objectives, policies and strategies with regard to manpower planning and human resource development in the tourism sector (both hospitality and tourism) and evaluate the NTA's capacity to develop and manage tourism in a professional manner (at the central and local levels).</p> <p>Undertake a qualitative and quantitative evaluation of the existing hospitality and tourism management training programmes/courses both in public and private sector institutions.</p> <p>Review curricular structure with focus on strengths and weaknesses, and, conduct a comparative analysis with well-established international curricular models.</p> <p>Carry out a detailed evaluation of all aspects of hotel operations with particular emphasis on operational standards of various departments like front office, food and beverage service, food production, accommodation management, automation, and all other related services.</p> <p>Identify operational deficiencies in the entire range of hotel operations and services. Similar evaluations to be undertaken for other tourist services and facilities, particularly tour operations, travel agencies and tour guides with emphasis on operating standards, staffing, fair trade practices, creativity and innovation.</p> <p>Phase II: Based on the evaluation undertaken in Phase I and taking into account tourism trends and forecasts for the country, as well as current qualitative and quantitative employment levels in the industry, prepare a complete manpower development plan for both public and private sectors in tourism.</p> <p>The plan includes curricula for various educational programmes, and, training modules for hospitality skills including train the- trainer programmes.</p> <p>The plan is supported by an accreditation and quality standardization system.</p>
Duration:	2-4 months
Target beneficiaries:	National tourism administration, provincial governments, private sector.
Outputs/ deliverables:	Well-structured manpower plan; improved capacities for HRD management; Strengthened education and training facilities; and establishment of an accreditation and quality standardization system.

3.02 Capacity Building Programmes in Hospitality Skills and Tourism Business Development

Objective:	Provide intensive training to local communities/ private sector in various aspects of development and management of tourism businesses, and hospitality skills to provide them with better opportunities to seek employment in the tourism sector.
Methodology:	<p>Series of intensive courses focused on:</p> <ul style="list-style-type: none">- business opportunities from tourism;- how to run a small business (café, handicraft shop, homestay);- business regulations and standards that apply to tourism businesses;- financing of tourism businesses including micro-credit;- tour guiding and interpretation;- language skills;- professional grooming;- all aspects of hotel management; and- tourist safety and security. <p>The courses are as participatory as possible with interactive working sessions and group exercises. The courses provide international, regional and local case studies and best practices which can be applicable to the local context.</p>
Duration:	1-3 months (depending on the number of courses)
Target beneficiaries:	Local communities / private sector.
Outputs/ deliverables:	Improved capacities of private sector and local community members in tourism businesses and hospitality skills to promote their participation in the tourism sector.

3.03 Skills Development, Education and Vocational Training

Objective: To assess the gap between the private sector needs and the local supply of trained tourism staff; and; To build capacities of local people to benefit from employment and career in the tourism sector based on the gaps identified between the private sector needs and the availability of local skilled manpower.

Methodology: *A four phase approach:*

Phase I: Training needs analysis, to identify opportunities to enhance local employment in the tourism sector through providing vocational training.

Phase II: Identification of training institutions and curriculum development.

Phase III: Train the trainers' session.

Phase IV: Delivering intensive vocational training courses to existing local work force of tourism enterprises and local people that want to find employment in the tourism sector.

Duration: 6 -18 months

Outputs/ deliverables: Vocational training programme for local people on topics as housekeeping, customer relations, cooking, tour guiding, etc.
Existing and new work force better qualified to get employment in tourism enterprises and have increased possibilities for career development and higher incomes.

3.04 Strengthening Decent Work

Objective:	Strengthen tripartite structures. It is fundamental to enhance the productivity and quality of labour for the benefit of employers, workers and governments – and for those people who depend on the industry and hence for poverty reduction.
Methodology:	Main activities: Direct action at country, sub-regional or regional level to highlight the significance of decent labour standards including social dialogue in the elaboration of poverty reduction strategies.
Duration:	Long term and on-going
Target beneficiaries:	Policy makers, labour and tourism ministries, employers' and workers organizations.
Outputs/ deliverables:	Bolwell, D., Weinz, W., 2008: Guide for social dialogue in the tourism industry (Geneva, ILO). (Available in English) Boardman, J., Barbato, B., 2008: Review of socially responsible HR and labour relations in practice in international hotel chains (Geneva, ILO). (Available in English)

3.05 Strengthening the Role of Women in Tourism

Objective:	Unlock women's trade potential in the tourism sector by systematically integrating gender considerations into national and sectorial strategy and development planning
Methodology:	<ul style="list-style-type: none">- Identification of, then consultation with, key stakeholders to garner buy-in from women's business organisations and associations, sectorial trade support institutions, ministries of women's affairs, trade and other key parts of the national gender machinery, for the strategy/plan.- Initial gender audit undertaken to establish base-line on sectors in which women are active; and where there is potential for women to increase the economic benefit derived from their participation in tourism-oriented production and service provision.- Gender-sensitive value chain analyses undertaken in select sectors with potential to have high economic and human development impact.- Cross cutting issues identified through consultation with the stakeholder group.- Validation workshop followed by delivery of strategy/planning document to appropriate party (government), with contacts of the key stakeholder network to encourage their on-going participation in the implementation phase.
Duration:	6 months
Target beneficiaries:	Women engaged in activities along the tourism value chain, including women entrepreneurs. Women's business organisations and associations and tourism- related TSIs as key service providers.
Outputs/ deliverables:	A gender-responsive national export strategy or sector strategy; or a component of a national development plan, strategy or other like document.

3.06 Training Needs Analysis for a Destination

Objective:	Capacity development of tourism related institution (Government, Institutions and private sector).
Methodology:	<p>Capacity development interventions as the process through which individuals, organizations and societies obtain, strengthen and maintain the capabilities to set and achieve their own development objectives over time.</p> <p>The overall training needs analysis should be prepared in light of the current needs as well as project growth and development of the destination (number of new hotels, new areas to be developed, niche segments, as well as increase in seats capacity and connectivity (land, sea).</p> <p>Three areas where capacity is grown and nurtured: in an enabling environment, in organizations and within individuals.</p> <p>These three levels influence each other in a fluid way – the strength of each depends on, and determines, the strength of the others.</p> <p>Capacity development interventions would entail:</p> <ul style="list-style-type: none"> • Participatory review of the methodology • Capacity needs assessment / development plan formulation • Capacity needs assessment / development plan validation • Capacity development plan implementation <p>Typical interventions include organizational/process reviews, skill development, support to vocational institutions and capacity development measure for the management and implementation of tourism policies and programmes. However it is essential to include the Tourism Capacity needs analysis within the overall training needs capacity of the country, all sectors integrated.</p>
Duration:	Depending on complexity / country context (6 months - 2years)
Target beneficiaries:	Developing countries, Least Developed Countries, Post-conflict countries.
Outputs/ deliverables:	Tourism related institutions capacity gaps and assets are mapped Capacity of tourism related institution is strengthened through customized programs and solutions.

IV. POVERTY REDUCTION AND SOCIAL INCLUSION

Tourism has proven to have a positive influence on poverty reduction. From supply chains to enterprise creation, a range of intervention points and mechanisms have been identified for increasing the proportion of tourism income that reaches and benefits the poor. To sustain the impact, a commitment from government and the private sector at all levels is needed to ensure that local stakeholders are consulted, engaged and empowered to influence decisions on tourism development and operations that may affect their livelihood, environment and communities.

IV. POVERTY REDUCTION AND SOCIAL INCLUSION

- 4.01 Facilitating Pro-poor Growth in Tourism Destinations
- 4.02 Sustainable Tourism - Eliminating Poverty (ST-EP) Initiative
- 4.03 National Sustainable Tourism - Eliminating Poverty (ST-EP) Training Seminars
- 4.04 Value Chain Analysis and Local Economic Development
- 4.05 Rural Tourism Strategies
- 4.06 Facilitating Tourism Development at Grass Roots Level
- 4.07 Pro-poor Business Linkages in Tourism
- 4.08 Tourism Small and Medium Enterprise Development
- 4.09 Tourism and Hospitality Training Programmes for Disadvantaged Youth
- 4.10 Child Protection in Tourism

4.01 Facilitating Pro-poor Growth in Tourism Destinations

Objective: To enhance the local economic impact from tourism in a destination through applying the 7 Sustainable Tourism-Eliminating Poverty (ST-EP) Mechanisms.

Methodology:

- Value chain analysis to understand tourism income flows in the destination and identify opportunities to enhance the local economic impact.
- Formulate an action plan with interventions to help increase the direct contribution (through local employment, the supply chain, informal sector and tourism SMEs) as well as the indirect contribution (through taxes and fees, voluntary giving and infrastructure development) from tourism to the local economy.
- Identify and work with training institutes, business development providers and financial services providers to provide support to local people and small and medium enterprises to obtain skills and/or resources required to find employment in the tourism sector or sell goods and services to tourists and tourism enterprises.
- Identify and work with government institutes and private sector stakeholders to channel income from tourism related fees and taxes to community development projects, to introduce and promote voluntary giving mechanisms in the tourism sector, and to mobilize resources for investments in tourism related infrastructure that also benefit the local people in the destination.
- Support a destination management organisation and/or selected public and private sector stakeholders to plan and carry out marketing activities for the destination with a view to enhancing the overall income from tourism in the destination.
- Develop an impact measurement system that collects data on the number of tourist arrivals in the destination, the income generated from tourism in the destination, and the number of direct and indirect beneficiaries from the project interventions.

Duration: 24 - 48 months

Outputs/ deliverables: Increased number of local people benefiting from tourism in a direct (through local employment, the supply chain, informal sector and tourism SMEs) and indirect (through taxes and fees, voluntary giving and infrastructure improvement) manner.

4.02 Sustainable Tourism-Eliminating Poverty (ST-EP) Initiative

Objective:	The Sustainable Tourism - Eliminating Poverty Initiative (ST-EP) (UNWTO) aims to promote tourism's potential to help reduce poverty levels through developing sustainable forms of tourism. The initiative focuses on encouraging sustainable tourism – social, economic and ecological – with activities that specifically alleviate poverty, deliver development and create jobs for people living on less than a dollar a day.
Methodology:	Research and Publications – The ST-EP Initiative carries out extensive research and publishes reports to provide evidence of the impact of tourism in reducing poverty levels, accompanied by recommendations on how to maximize these impacts. Specific studies can be carried out in a destination or a country to identify project interventions to help increase tourism's contribution to poverty reduction. The foundations of the ST-EP Initiative were first outlined in the publication "Tourism and Poverty Alleviation: Recommendations for Action". The Initiative is based on seven ST-EP mechanisms through which the poor can benefit from tourism. These strategic lines of action are incorporated into all ST-EP activities and have been widely disseminated.
	The seven ST-EP mechanisms: 1. Employment of the poor in tourism enterprises , 2. Supply of goods and services to tourism enterprises by the poor or by enterprises employing the poor 3. Direct sales of goods and services to visitors by the poor (informal economy) 4. Establishment and running of small, micro or community-based tourism enterprises or joint ventures by the poor (formal economy) 5. Redistribution of proceeds from tax or charge on tourists or tourism enterprises 6. Voluntary giving and support by tourists or tourism enterprises 7. Investment in infrastructure stimulated by tourism also benefiting the poor in the locality, directly or through support to other sectors
	Capacity Building and Awareness Raising – The ST-EP Initiative organizes regional and national conferences and training seminars to raise awareness and to build capacities among public officials, NGOs, the private sector and communities in developing countries. Awareness raising activities pay special attention to the importance of including the tourism sector in poverty reduction strategies and programmes, and to make ample reference to poverty reduction in the tourism policies and strategies. ST-EP projects – In collaboration with the National Tourism Administration, other public entities, the private sector and NGOs, possible ST-EP projects can be identified that aim to make tangible contribution to poverty reduction through applying one or more of the seven ST-EP mechanisms. ST-EP projects can focus on a wide range of activities, such as training of local guides and hotel employees, facilitating the involvement of local people in tourism development around natural and cultural heritage sites, establishing business linkages between poor producers and tourism enterprises, providing business and financial services to small, medium and community based tourism enterprises, and enhancing the local economic impact from tourism in a destination through by addressing most or all of the seven ST-EP mechanisms.
Duration:	From a few weeks to several years, depending on the type of intervention.
Target beneficiaries:	The final beneficiaries of the ST-EP Initiative are the poorer groups of the society in tourism destinations. Intermediary beneficiaries are government organisations, the private sector and NGOs, whose capacities are built to help reduce poverty levels through promoting and developing sustainable forms of tourism.
Outputs/ deliverables:	Enhanced awareness and capacities on tourism's contribution to poverty reduction resulting in increased opportunities for the poorer groups of the society to generate income from sustainable tourism development.

4.03 National Sustainable Tourism-Eliminating Poverty (ST-EP) Training Seminars

Objective:	To build capacities of tourism and development professionals on practical steps that can be taken in tourism destinations to shape and manage tourism in ways which deliver more benefits to disadvantaged individuals and communities.
Methodology:	<p>The training seminar addresses the three classic components of a project cycle: Analysis/Planning, Action and Assessment</p> <p>Analysis/Planning – This component looks at the process of analysing a tourism destination in terms of the current contribution of tourism to the poor and the planning process of how this can be strengthened in future, including the development of a strategy and an action plan.</p> <p>Action – This component provides guidance on practical ways of delivering tourism benefits to the poor, based on the seven ST-EP mechanisms.</p> <p>Assessment – This component looks at the use of indicators and measurement processes to evaluate whether actions taken have helped towards delivering tourism benefits to the poor.</p> <p>The seminar programme is structured in such a way so as to be as interactive as possible, incorporating group discussions, work sessions, field exercises, etc., with the intention that lessons learned and ideas generated can be applied by the participants in their daily work.</p>
Duration:	1 week for the delivery of the seminar
Target beneficiaries:	Representatives from the public sector, private sector and civil society working in the field of tourism and sustainable development. Indirectly, poorer groups in tourism destinations in the country will benefit when participants apply the expertise and experiences gained in their daily work.
Outputs/ deliverables:	Capacities built of representatives from the public sector, private sector and civil society to identify, plan and implement strategies and activities that enhance benefits for disadvantaged groups from tourism.

4.04 Value Chain Analysis and Local Economic Development

Objective:	Investigate the structure and working of the tourism value chain in a destination and the economic value generated, and plan and execute actions to enhance the local economic impact of tourism. In destinations that are concerned about poverty alleviation, specific attention is paid to analyzing the amount of income from all transactions in the tourism sector that is received by the poor, and to identifying which particular kinds of transactions are most pro-poor or have the potential to be made more pro-poor. The value chain analysis concludes with an action plan outlining interventions to enhance the local economic impact from tourism in the destination; especially interventions that will secure a significant increase in the flow of income and opportunities to the poor.
Methodology:	<p>Two phase approach:</p> <p>Phase I: Value chain analysis mission which investigates the structure of the tourism value chain in the destination and prepares an action plan to enhance the local economic impact from tourism.</p> <p>Phase II: Execution of project interventions to enhance the local economic impact from tourism in the destination.</p> <p>A local organization is selected to act as executing agency for the planned interventions, and capacities are built among key stakeholders in the destination to encourage and enable them to work together on enhancing the local economic impact from tourism.</p>
Duration:	Depending on complexity / country context (2-5 years)
Target beneficiaries:	Developing countries, Least Developed Countries, Post-conflict countries
Outputs/ deliverables:	<ul style="list-style-type: none">- Integrated approach to tourism development that favour poverty reduction- Eco-tourism solutions identified and promoted- Cultural tourism solutions identified and promoted

4.05 Rural Tourism Strategies

Objective:	Formulate a long-term development framework for rural tourism (10-20 years) with emphasis on policy and strategy; planning; institutional strengthening particularly at the central, regional and municipal level; quality standards (with particular reference to homestays and rural tourism entrepreneurship); legislation and regulation; product development and diversification (building linkages with other rural activities such as agriculture); marketing and promotion; tourism infrastructure and superstructure; economic impact of tourism and tourism investment; human resource development; and, socio-cultural and environmental impacts of tourism.
Methodology:	<p>Three phase approach:</p> <p>Phase I: project formulation mission which analyses the current rural tourism scenario, its potential and constraints, and, prepares a project document (detailed terms of reference) for the formulation of a Rural Tourism Master Plan.</p> <p>Phase II: formulation of a Rural Tourism Master Plan which will focus on the following sectors:</p> <ul style="list-style-type: none"> - transport – particularly road infrastructure - product development and diversification – need for structured holistic rural tourism experiences which reflect the true character of the destination (range of products can include cultural tourism, nature tourism, sport and adventure tourism, well-being and health tourism, family and child tourism, short-breaks tourism, MICE tourism, nautical and cruise tourism if applicable) - tourist activities – creation of man-made attractions (museums, interpretation centres, fairs, festivals, etc. which enhance the rural tourism product and reduce the impacts of seasonality) - tourism zoning – with particular reference to ensuring sustainability of natural and cultural tourism resources - marketing and promotion - institutional framework - organization between the national, regional and local stakeholders (public and private sectors, civil society) in order to manage rural tourism development in an efficient and sustainable way - statistics and research - legislation and regulation - quality standards of tourism services, especially for rural tourism accommodation providers - human resource development in rural tourism through awareness programmes to encourage local communities to participate in tourism, capacity building in hospitality skills and tourism management in accordance with quality standards providing quality tourism services, and, training in development, management and operations of small businesses reduction of gaps in the rural tourism value chain by developing linkages to local agricultural products and other non-food products which are produced and processed locally. Promote the production of local handicrafts and stimulate the participation of women in tourism
Duration:	3-8 months
Target beneficiaries:	National tourism administration, provincial governments, destination management organizations.
Outputs/ deliverables:	A rural tourism master plan which provides an organized and structured framework for the sustainable diversification and enhancement of rural economies. It will include a short term (three-year) action plan for priority actions to be undertaken to kick-start sustainable tourism development.

4.06 Facilitating Tourism Development at Grassroots Level

Objective:	Fostering poverty reduction and inclusive growth through the development of the tourism sector. The ultimate objective of involvement is to reduce poverty through sustainable and pro-poor solutions.
Methodology:	Integrated and customized solutions are offered for achieving poverty reduction and inclusive growth objectives through the development of tourism sector. Working directly with national counterparts in the implementation of area based projects that promote rural tourism as an income generating activity. Tourism can play an important role in raising levels of human development and achieving sustainable poverty reduction outcomes. Properly shaped, tourism can generate opportunities for growth, poverty reduction, and human development and incentives for environmental protection. However, none of this is an automatic or inevitable. Converting comparative advantages in tourism into competitiveness requires a coherent policy framework, effective and efficient institutions, and a proactive private sector.
Duration:	Depending on complexity / country context (2-5 years)
Target beneficiaries:	Developing countries, Least Developed Countries, Post-conflict countries
Outputs/ deliverables:	<ul style="list-style-type: none">- Integrated approach to tourism development that favour poverty reduction- Eco-tourism solutions identified and promoted- Cultural tourism solutions identified and promoted

4.07 Pro-poor Business Linkages in Tourism

Objective: To establish backward business linkages between local communities and larger tourism enterprises in a destination for the supply of goods and services.

Methodology: *A four phase approach*

Phase I: Analyze the supply chain of selected tourism enterprises in a destination to identify opportunities for the supply of local goods and services, such as agricultural products, handicrafts and other creative industries products and services, excursion and cultural activities.

Phase II: Assess the feasibility for local people to deliver the identified products and services in the right quality, quantity and continuity, as required by tourism enterprises in the destination.

Phase III: Facilitate the meetings between local people and tourism enterprises (Hotels, Tour operators, Souvenir shops, etc.) with a view to making fair arrangements for the local supply of goods and services. If necessary, e.g. with agricultural products, work with or establish an intermediary organisation to buy products from local people and deliver these to tourism enterprises.

Phase IV: Provide advisory and financial services to produce the goods and services required by the tourism enterprise. Facilitate adjustments to the product to meet the exact demand of the enterprises, such as e.g. bio-transformation for supply of agricultural products.

Duration: 6 - 8 months

Outputs/ deliverables: Agreements made between tourism enterprises and local people for the supply of goods and services, generating additional income for local people.

4.08 Tourism Small and Medium Enterprise Development

Objective: To support (networks of) existing and new tourism SMEs, including community based tourism enterprises, with a view to enabling local people to successfully manage tourism enterprises.

Methodology: *A five phase approach:*

Phase I: Feasibility study to assess the potential for existing and new tourism SMEs to operate in a profitable manner in the destination.

Phase II: Identification of financial services and business development services that the SMEs require, based on which a support plan for the SMEs is prepared.

Phase III: Provision of required business development services (advice/training on business planning, financial management, human resources development, product development & marketing).

Phase IV: Arrangements made for the provision of financial services (micro credit, matching grants, capital attracted through joint venture) to enable the SMEs to make required investments.

Phase V: Support to individual SMEs and networks of SMEs to produce marketing materials and carry out marketing activities.

Duration: 12- 36 months

Outputs/ deliverables: Tourism SMEs have the skills and capital required to successfully develop and promote their business, and to achieve a significant turn over and create local employment.

4.09 Tourism and Hospitality Training Programmes for Disadvantaged Youth

Objective:	To provide youth from a disadvantaged background with adequate new skills and experiences to enhance their opportunities for employment in tour companies and the hotel industry in main tourism destinations in a country.
Methodology:	<p>Phase 1 – Establishing contacts and making arrangements with tour operators and hotels in selected tourism destinations in the country for provision of vocational training to disadvantaged youth.</p> <p>Phase 2 – Raising awareness on the employment opportunities in the tourism sector among youth, encourage youth and their parents to consider working in hotels and tour companies.</p> <p>Phase 3 – Identification, screening and selection of the most deserving youth candidates in partnership with the participating hotels and tour operators.</p> <p>Phase 4 – Capacity building and practical training for the selected youth, based on existing training courses that the participating hotels and tour operators regularly offer to their staff, supplemented by external courses. The programme includes about 750 training hours through a combination of theoretical and practical instruction.</p> <p>Phase 5 – Follow-up guidance to participants who have completed the programme in order to support them with their career choices.</p>
Duration:	12 - 18 months
Target beneficiaries:	Young people from a disadvantaged background; especially secondary school leavers who do not have the resources to continue their professional education. (Good possibilities exist to use the same approach for initiatives targeting women.)
Outputs/ Deliverables:	Capacities built of disadvantaged local youth to gain employment in hotels and tour companies in the destination.

4.10 Child Protection in Tourism

Objective:	Formulate or/and reinforce legislation, guidelines and procedures for national tourism administrations to curb any form of child exploitation related to tourism (i.e. sexual and labor exploitation, child trafficking), in close collaboration with other governmental institutions, the private sector, intergovernmental and non-governmental organizations, and the media.
Methodology:	The methodology encompasses legislation, awareness-raising, centralized coordination, research, training, multi-stakeholder cooperation at the local, regional and international levels and communication channels. The suggested actions are as follows: <ul style="list-style-type: none">• Adopting specific legal and administrative measures to address child exploitation in tourism at all levels, including legislation that criminalizes sex with minors and extraterritorial laws that penalize perpetrators outside their country of origin and/or residence;• Developing and monitoring the effectiveness of awareness-raising campaigns;• Setting up special child victim units or designating focal points to address cases of child victims of exploitation related to tourism;• Establishing hotlines for reporting incidences and seeking advice and counseling;• Conducting research, developing and implementing educational, training and capacity-building programmes on child exploitation in tourism;• Supporting the private sector and civil society stakeholders in designing and/or implementing codes of conduct on the protection of children, as well as the social and labor inclusion programmes targeting the victims;• Collaborating with the private sector to ensure that accommodation and transport facilities are not misused for any kind of exploitation of children;• Increasing cooperation between tourism and national/international law enforcement authorities;• Collaborating with other governments, in both tourist-receiving and tourist-originating countries, to develop concrete programmes and share good practices, especially through regional networks;
Duration:	Maintaining regular communication with the media regarding awareness-raising and accurate reporting of successful stories related to the protection of wellbeing of children in tourism destinations.
Target beneficiaries:	National tourism administrations, other governmental institutions (in charge of justice, law enforcement, foreign affairs, education, labour, family/welfare, economy, culture and sports, etc.), the private sector, non-governmental organizations, Information Communication Technologies channels (ICTs), and the media.
Outputs/ deliverables:	Established partnership mechanisms, improved legislative/institutional framework, improved reporting and recording systems of cases of child exploitation in tourism, adopted training methodology, and enhanced awareness-raising.

V. SUSTAINABILITY OF THE NATURAL AND CULTURAL ENVIRONMENT

Recognising tourism's unique relationship and interdependency to both the natural and cultural environment is essential to protecting and safeguarding these valuable assets. Effective management of cultural heritage, protected areas, and biodiversity, including the importance of the sustainable management of natural resources such as water and energy, are required in all types of destinations, including cities.

V. SUSTAINABILITY OF THE NATURAL AND CULTURAL ENVIRONMENT

- 5.01 Capacity Building Programmes on Application of Indicators for Sustainable Tourism
- 5.02 Observatories of Sustainable Tourism - A Systematic Application of Sustainable Tourism Indicators
- 5.03 Biodiversity and Tourism: Development and Implementation of Local Participatory Tourism Management Plans for Sustainable Use and Conservation of Biodiversity
- 5.04 Development of Biodiversity-based Tourism Products
- 5.05 Training and Capacity Building on Tourism and Biodiversity
- 5.06 Developing Policy Frameworks Integrating Culture into Development through Tourism
- 5.07 Capacity Building Programmes on Tourism Management at Heritage Sites
- 5.08 Capacity Building in Tourism Management of World Heritage Sites and other Sites
- 5.09 Tourism Specialization: Cultural Tourism
- 5.10 Capacity Building Programmes on Climate Change Adaptation and Mitigation
- 5.11 Energy Efficiency and Waste and Water Management in the Accommodation Sector
- 5.12 Hotel Energy Solutions (HES) – Energy Management Toolkit
- 5.13 Training for Tour Operators and Guides – Good Practices in Sensitive Environments
- 5.14 Capacity Building Workshops on Risk and Crisis Management and Recovery Techniques
- 5.15 Development of Sustainable Tourism Campaigns
- 5.16 Ecotourism Policies and Strategies
- 5.17 Strengthening of Sustainable Tourism Governance

5.01 Capacity Building Programmes on Application of Indicators for Sustainable Tourism

Objective:	Based on a decade-long experience in this field, provide training on sustainable tourism and indicators to relevant public administrations and the tourism private sector at central, regional and local levels.
Methodology:	Using a participatory approach: <ul style="list-style-type: none">• Identify tourism trends and sustainability;• Review and analysis of sustainable tourism policies and tools: principles and practice;• Engage national and local stakeholders;• Coordination of a stakeholder workshop to introduce key concepts, validate findings and agree on planning framework and indicators;• Introduction to the application of sustainable tourism indicators;• Presentation of methodology and experiences from different destinations;• Discuss the role of indicators in planning and management processes, with specific applications for destinations;• Situation analysis and identification of key objectives and issues of sustainable tourism in the case study area;• Formulate draft indicators; and• Define an action and monitoring plan for destination management.
Duration:	3-5 days
Target beneficiaries:	National tourism administration, provincial governments, private sector and other tourism stakeholders (e.g. parks authorities, conservation organizations).
Outputs/ deliverables:	Improved capacities on indicators application of government officials at the national and local level, and of the tourism private sector. It can also be the first step toward the establishment of a sustainable tourism observatory.

5.02 Observatories of Sustainable Tourism – A Systematic Application of Sustainable Tourism Indicators

Objective:	Establish an observatory for a defined destination, through the use of a systematic application of monitoring, evaluation (sustainable tourism indicators) and information management techniques, as key tools for the formulation and implementation of sustainable tourism policies, strategies, plans and management processes.
Methodology:	<p>Phase I: Capacity building programmes on application of indicators for sustainable tourism (see pages 46 and 47).</p> <p>Phase II: Implementation mechanism through a monitoring centre1.</p> <p>Main tasks:</p> <ul style="list-style-type: none">• Establishing, managing and monitoring the observatory;• Communicating the outcomes of monitoring activities through annual reporting;• Follow-up on technical backstopping; and• Follow-up on corrective actions taken.
Duration:	Initial phase: 3 – 6 months (formal planning and theoretical framework). Second phase: minimum 3 - 5 years (establishing, managing and monitoring the observatory).
Target beneficiaries:	This is an initiative addressed to national and local tourism authorities.
Outputs/ deliverables:	Improved capacities for information management and monitoring in support of decision and policy making, and ultimately a more sustainable tourism destination.

5.03 Biodiversity and Tourism: Development and Implementation of Local Participatory Tourism Management Plans for Sustainable Use and Conservation of Biodiversity

Objective:	Generate knowledge about the potential of local biological diversity for tourism and tourism products. Develop and implement local plans, using participatory approach methods, which valorize biodiversity as a major capital for tourism development; define the options how tourism can contribute to safeguarding and maintaining the local biological diversity; define the options for the improvement of local livelihoods through the sustainable use of biodiversity; harmonize tourism planning with local, national and regional legislation and frameworks, in particular on biodiversity conservation.
Methodology:	<ol style="list-style-type: none">1. Assess feasibility2. Establish an expert team3. Meeting with stakeholders and identification of local tour operators4. Local community involvement and participation initiation (including implementation of a Community Involvement Plan)5. Baseline information<ul style="list-style-type: none">• Baseline data collection;• Data evaluation and assessment;• Gap analysis; and• Database formation.6. Elaboration of Tourism Management Plan (TMP) Baseline information (area description); Analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT); Goals, Visions and Objectives; Baseline information (economic, social, natural environment); Approval of TMP; and Establish monitoring and evaluation framework.7. Capacity building process Consultation of TMP with the local communities, governmental authorities, stakeholders and tour operators8. Coordinate the TMP with other projects
Duration:	Depending on available information and cooperation structures: 1 - 3 years.
Target beneficiaries:	Local communities, local/ international tour operators, destination management organizations, provincial government, national tourism administrations.
Outputs/ deliverables:	The TMP document; <ul style="list-style-type: none">• SWOT analysis;• Baseline study on the natural environment, social and economic structure;• Community Involvement Plan;• Monitoring and evaluation system for control of success and adaptation measures; and• Knowledge on biodiversity and tourism generated.

5.04 Development of Biodiversity-based Tourism Products

Objective:	Create sustainable tourism products that increase the socioeconomic welfare of the local community and destination, as well as being in line with the principles of sustainable use and conservation of biological diversity (using the 'Guidelines of Biological Diversity and Tourism Development' of the Convention on Biological Diversity, CBD).
Methodology:	<ol style="list-style-type: none"> Fact finding mission (feasibility study) Baseline study <ul style="list-style-type: none"> Natural and cultural assets data collection; Tourism infrastructure analysis; SWOT analysis; Gap analysis; and Database creation. Local community consultation, stakeholders and local tour operators identification Product matching <ul style="list-style-type: none"> Market potential (current and future market trends; Local community capacity and potentials; and Tourism product potential. Identify and select target market Design the biodiversity tourism package (including business and investment plans) Develop marketing strategy with: <ul style="list-style-type: none"> local community; tour operators; and other stakeholders. Marketing campaign for the biodiversity product Biodiversity product launch Establish system of monitoring and evaluation of product
Duration:	Depending on available information and cooperation structures: 1 - 3 months.
Target beneficiaries:	Core stakeholders of local communities, local tour operators, destination management organizations, national tourism administrations, provincial governments, private sector.
Outputs/ deliverables:	A sustainable tourism product that is distinctive and competitive; one which takes into account the conservation of biodiversity, encourages sound economic development in line with the guidelines of the CBD, preserves the local culture, traditions, and local community ways of life.

5.05 Training and Capacity Building on Tourism and Biodiversity

Objective:	Transfer of knowledge to target groups working in tourism and biodiversity management. The acquired skills will provide the target groups with a better understanding of the interdependence between tourism and biodiversity and how to implement biodiversity-based tourism products. Instruments and mechanisms which are necessary at local level for selforganizing participatory tourism will be part of the training.
Methodology:	<p>Workshop approach: The knowledge transfer will be achieved by using thematic, interactive workshops.</p> <p>The transfer focuses on the following user groups:</p> <ul style="list-style-type: none">• staff of administrations;• hotel staff, tourist• information points;• local tour guides; and• community hosts. <p>1. Training local entrepreneurs</p> <p>Capacity building and knowledge transfer for local businesses involved directly or indirectly in the tourism sector</p> <p>2. Training of governmental administrations at national level on interlinking the thematic fields of tourism and biodiversity</p> <p>3. Awareness raising of tourism issues within the local community</p> <p>An approach based on raising awareness and support for tourism and Biodiversity among the local communities.</p> <p>This encourages local community participation during product development.</p> <p>4. Community workshops</p> <p>Courses that provide local communities with knowledge on tourism at the international, national, and local levels. These include courses such as language skills, communication styles and conflict resolution.</p>
Duration:	Courses will be tailored according to target group and site specific needs. Duration can vary between 2 and 6 days.
Target beneficiaries:	Local communities, tour operators, national tourism and conservation organizations/agencies, territorial governments, destination management organizations, the private sector.
Outputs/ deliverables:	<ul style="list-style-type: none">• Knowledge generated and utilized about tourism and biodiversity;• Training methodology and material disseminated; and• Effectiveness of training and improvement of training measures monitored.

5.06 Developing Policy Frameworks Integrating Culture Into Development Through Tourism

Objective:	Provide assistance in developing activities aimed at creating policy frameworks and project documents that integrate culture under all forms – tangible and intangible heritage, living heritage, cultural industries and handicraft, museums – into development process through tourism building on the experience gained through the MDG-F Joint Programmes on Culture and Development which included a tourism component.
Methodology:	Support a series of workshops and vocational training sessions for policy makers, site managers, local and national authorities from different sectors and disciplines and develop and disseminate training material. <u>The themes of the activities include:</u> <ul style="list-style-type: none">• Assessment and mapping of cultural assets• Collecting data on the economy of the culture sector, including tangible and living heritage, cultural industries, handicraft and museums• Culture and development indicators• Assessment of human resources and training needs• Preserving heritage• Promoting and enhancing cultural creation and events• Cultural tourism stakeholders cooperation mechanism• Promote/protect indigenous minorities people culture• Promote private enterprise Enhance governance of culture• Capacity building in tourism services• Involvement of local communities• Develop tourism products and circuits• Reinforce cultural and tourism infrastructure• Develop institutional capacity• Promote women s' development
Duration:	To be defined
Target beneficiaries :	Member States (local and national policy/decision makers), site managers, local communities, tourists, local, national international tourism sector companies, tourist guides.
Outputs/ deliverables :	Policy frameworks, projects documents harnessing the linkages between culture under all forms and tourism for development. Interdisciplinary cooperation frameworks created, local population involved.

5.07 Capacity Building Programmes on Tourism Management at Heritage Sites

Objective:	Provide training to relevant public administrations and the tourism private sector at different levels, conducive to the development of policy and operational guidelines to handle tourists' congestion at cultural and natural heritage sites, as well as to improve the ability of the tourism sector to develop and present their destinations and heritage sites in a more comprehensive manner.
Methodology:	Holding of a workshop building on the past experience of cooperation to support the management of tourism at World Heritage Cultural Sites; and publications on congestion management and communicating heritage, provide the knowledge background. Tourism trends and congestion management; <ul style="list-style-type: none">• Sustainable tourism policies and tools: principles and practice;• Review of key concepts on congestion management;• Impacts and challenges of tourism congestion;• Actions for control of tourism congestion;• Integrated approach to congestion management;• Recommendations for setting management objectives;• Introduction of key concepts of heritage communication;• Current trends within tourism and heritage;• Connecting tourists with heritage; and• Delivering heritage communication within the tourism experience.
Duration:	3 days
Target beneficiaries:	National tourism authorities, private sector and public bodies.
Outputs/ deliverables:	Improved capacities of national tourism authorities, private sector and public bodies responsible for cultural and natural heritage.

5.08 Capacity Building in Tourism Management of World Heritage Sites and Other Sites

Objective:	Provide capacity building to site managers and heritage tourism stakeholders including tourism sector, tourist guides and representatives of the local community on how to prepare a tourism management plan of a site in the double objective of preserving the values of the site and allowing a sustainable use by tourism activities.
Methodology:	<p>Series of workshops and seminars organized. A participatory method associating local stakeholders and trainers will be used.</p> <p>The themes of the workshops include:</p> <ul style="list-style-type: none"> Creating or adapting legal framework with the UNESCO's conventions on heritage preservation as reference Defining shared understanding of the property – including tangible and intangible heritage - by all stakeholders Defining a strategy of tourism development and its goals Considering cooperation tools and methods for associating the Stakeholders Identify the human resources and the needs in capacity building Develop data collecting system on tourism and build an economic model of the site, that includes handicraft and cultural industries products Presentation and interpretation of heritage Defining an accountable, transparent description on how the management system function together with A cycle of planning, implementation, monitoring, evaluation, feedback and adaptation of the plan
Duration:	To be defined
Target beneficiaries :	Member States (local and national decision makers), site managers, local communities, experts, local, national international tourism sector companies
Outputs/ Deliverables :	Improved capacities in tourism management at sites, and in cooperation between heritage preservation and tourism stakeholders for elaborating heritage preservation sensitive tourism policies. Job creation generating revenues for the population. Improved funding of heritage preservation. Improved quality of tourism and increase of revenues of tourism.

5.09 Tourism Specialization: Cultural Tourism

Objective:	To assist countries to better articulate tourism policies within the creative industries policy and to undertake specific measures for strengthening the creative economy, since those sectors are interdependent and can be mutually supportive.
Methodology:	<p>To strengthen the participation of key cultural industries stakeholders in the process of formulation of policy through the establishment of institutional mechanisms to support the development of the cultural industries;</p> <p>To carry out research and analysis on the value and importance of cultural tourism for the expansion of services and goods exports by developing countries;</p> <p>To assist developing country stakeholders in the design of their own Services Development Strategies.</p>
Duration:	Minimum 2 years.
Target beneficiaries:	<p>Policy makers with competence in the area such as ministries of tourism, cultural heritage and environment;</p> <p>Cultural /Creative industries stakeholders and associations working in (art crafts, visual arts, performing arts, heritage sites, publishing and printed media, design, audiovisuals, traditional cultural expressions, etc.);</p> <p>Relevant line ministries and governments institutions (Culture, Trade, Tourism, Technology, Environment, Development);</p> <p>Academia and teaching institutions working in the field of creative industries (Universities, research centers, etc.).</p>
Outputs/ Deliverables:	<p>Country policy-oriented studies to assist governments to articulate a development strategy that can optimize the economic potential of the cultural sectors for job creation, trade expansion and social inclusion;</p> <p>Advisory services aimed at enhancing the institutional and regulatory environment for the development of productive creative capacities, cultural entrepreneurship and trade opportunities;</p> <p>Training for policymakers and cultural industries in the formulation of strategies in the cultural industries;</p> <p>Networking activities to facilitate the exchange of information among cultural industries practitioners and fostering synergies to strengthen domestic supply capacities;</p> <p>National Services Policy Reviews in order to address several key factors for the development of cultural tourism services including the existence of an adequate enabling environment, the availability of an adequate policy, regulatory and institutional framework, and the identification of potential bottlenecks within the supply chain.</p>

5.10 Capacity Building Programmes on Climate Change Adaptation and Mitigation

Objective:	Strengthen the capacity of the tourism sector on adaptation to climate change and application of mitigation measures in order to respond to the challenges that global warming and its related impacts pose to the tourism sector.
Methodology:	<p>Series of workshops and practical seminars, particularly for developing countries and small island states, but also for vulnerable regions (e.g. the Mediterranean) which include:</p> <ul style="list-style-type: none">• Detailed and comprehensive review of research on current and future predicted impacts of climate change on global tourism;• Identification of the particularities of tourism as highly climate-sensitive economic sector;• Analysis of the impacts of climate change at destinations;• Review of potential options for adaptation and mitigation of the tourism sector to climate change, including on key emissions abatement options for transportation (car, air and water transport) and on mitigation measures for the accommodation sector;• Identification of adaptation and mitigation techniques, tools and processes options for mitigation and adaptation suitable to a particular destination; and• Recommendations for establishing an Action Plan that ensures that tourism growth is compatible with new patterns of energy consumption and new scenarios of low carbon economies.
Duration:	3 days
Target beneficiaries:	National and regional tourism authorities, private sector, other stakeholders (e.g. environment authorities, academia).
Outputs/ deliverables:	Improved capacities of public and private sector stakeholders in their efforts of integrating mitigation and adaptation of climate change into their broader institutional, policy and/or national goals, and programs in a practical manner.

5.11 Energy Efficiency and Waste and Water Management in the Accommodation Sector

Objective: Expand uptake of eco-efficient energy, waste and water management technologies in the accommodation sector (notably within SME's) by developing tools and materials to improve management actions and investment decisions in SME's use of energy and water and thus contribute to alleviating the sectorial impact on the environment and reduce costs.

Methodology: Methodologies for the accommodation sector have been developed to assess current practices and needs for energy efficiency (EE), waste and water management; identify and implement key EE and resource efficiency (RE), water conserving technologies, equipment, manufacturers and suppliers in order to facilitate competitiveness and innovation in the sector. Assist the tourism sector and its supply chain in improving its competitiveness and environmental performance through implementation of resources efficiency measures.

Module 1: Promoting RE in the accommodation sector and its supply chain: aims at assisting in the development of RE assessments and implementation for improving competitiveness at enterprise level and the training of national experts in this field. This will lead to enhanced resource productivity, improved competitiveness and reduce negative environmental and social impacts. The focus will be on:

- Benchmarking resource use and developing energy efficiency, renewable energy, and conservation programmes
- Water efficiency and quality management programmes
- Waste management with a focus on waste-to-resource conversion programmes
- Purchasing policies to integrate the use of "green products" (biodegradables, recyclable, non-toxic, etc.)
- Sustainable food purchases and practices

Module 2: develop training for trainers for national training programmes by the national associations.

Module 3: Technical assistance/benchmarking: a pilot project will be undertaken to provide technical assistance to accommodation suppliers and develop the capacity building materials. The pilot test will also build business action plans for energy efficiency/resource efficiency/waste (EE/RE) implementation by participating accommodation which will have their energy and water consumption footprint benchmarked, as well as monitor other indicators such as waste generation.

Duration: 6 months -2 years depending on the scope of the project.

Target beneficiaries : Accommodation sector including; individual hotels, chains, guest houses and hotel and tourism associations.

Outputs/ deliverables :

- Enhanced awareness and understanding by accommodation sector providers about the impact of unsustainable development in the tourism sector and facilitate the possible mitigation and adaptation responses to climate change;
- Enhanced capacities of technical support institutions in providing assistance to the tourism sector on developing and implementing resource efficiency and waste programmes;
- The competitiveness of the tourism sector improved through the economic gains obtained from efficient resource utilization and the delivery of services with improved environmental/social profile.

5.12 Hotel Energy Solutions (HES) - An Innovative Energy Efficiency Toolkit for Hotels

Objective:	Provide an easy to use and online mitigation toolkit to help hotels reduce their carbon footprint and operations costs, thus increasing business profits.
Methodology:	<p>The HES e-toolkit offers the best solutions to enhance and optimize energy performance, calculate the necessary initial investment and the return on that investment, and finally, it compares the results with similar properties. It helps users develop a strategy for reducing energy consumption, energy bills and the environmental impact as well as assisting destinations to be more competitive and sustainable.</p> <p>It provides:</p> <ul style="list-style-type: none"> • free of charge use of a series of tools and materials to help small and medium-sized hotels to plan for and invest in energy efficient and renewable energy technologies (in English only); and • communication tools (video 3D images and e-brochure) to sensitize guests on the importance of energy savings. Adaptation of the existing software is possible based on specific requirements, <p>i.e.:</p> <ol style="list-style-type: none"> 1. Language adaptation; 2. Capacity building workshop; and 3. Regional adaptation (i.e. climate, destination type) and resources (i.e. water, waste).
Duration:	<ol style="list-style-type: none"> 1. Language adaptation: 3 - 5 months 2. Capacity building workshop: 2 weeks 3. Preliminary regional adaptation study: 6 - 12 months
Target beneficiaries:	Small and medium-sized hotels across the European Union; hotels, tourism associations, destination management organizations, national tourism administration, and local communities globally.
Outputs/ deliverables:	The HES mitigation software will empower and guide accommodation establishments to better understand their energy consumption and show how to improve their energy management - how to increase energy efficiency and cut your operational costs. It can assist destinations for new policies and incentives for the operational sector.

5.13 Training for Tour Operators and Guides - Good Practices in Sensitive Environments

Objective:	Build the capacity of tour operators and guides to integrate sustainability into tour operations. This will be done through: Improving the environmental and social performance of tourism professionals working in particular environments (such as mountains, deserts, marine based tours, coastal tourism, tropical forest based tours...); Contributing to the conservation and the economic development of the area and increase Tour Operator attractiveness to increasingly discerning consumers.
Methodology:	<p>Seminar and training workshops</p> <p>Overall strategy: Identify areas of good performance and areas where tourism professionals can take measures to improve sustainability; give examples of good practices in specific ecosystem types; provide assistance to the operators to identify areas of business activity that need improvement and how to choose business partners and suppliers based on sustainability criteria; provide technical assistance.</p> <p>Module 1: Sustainability Overview of the specific area, introduction to the ecosystems and communities. Overview of typical tourism and tour activities in this area, discussion of the nature and potential impacts of tourism in the area. Identify the importance and benefits of adopting good practices</p> <p>Module 2: Good Business Practices Visitor education and interpretation: provide professionals with technical assistance to educate customers; Health and safety: Identify the range of potential risks associated with the relevant tour activities and tourist groups, identify the appropriate safety equipment; Engaging with local communities: provide professionals with recommendations.</p> <p>Module 3: Good Environmental Practices Provide the attendees with specific recommendations and technical assistance as well as tips and example of good practices from worldwide Tour Operators on the following issues: Interaction with wildlife: Resource consumption, energy and water use and transport, Waste generation and disposal, Contributing to conservation, Climate change</p> <p>Module 4: Good Practices for Specific Tour Activities Help identify the specific tourism activities related to the area and their impact on sustainability.</p> <p>Provide professionals with recommendations and technical assistance on how to develop sustainable activities on the area.</p> <p>Module 5: Evaluation and follow-up Evaluate professionals knowledge and expertise, identify gaps and make recommendations; Provide professionals with self-assessment tools; Implementation of "train the trainers" programme; Help identifying national and local agencies to collaborate in long term strategy elaboration.</p>
Duration:	3 to 5 days for a workshop 3 months for preparation
Target beneficiaries :	Tour Operators, Tourism Professionals
Outputs/ deliverables :	A local platform of tour operators established to implement good practices and work jointly with national and local agencies to develop sustainable tourism strategies. Increased generation of positive economic and social impacts. Train the Trainer programme.

5.14 Capacity Building Workshops on Risk and Crisis Management and Recovery Techniques

Objective:	Develop and strengthen the overall capacity to systematically develop crisis management systems for the tourism sector and to effectively use recovery techniques at the regional and national levels.
Methodology:	Workshop on Risk and Crisis Management This workshop addresses the core issues of a systematic approach to manage risks and crises, including the necessary organizational structures, accountabilities, policies and procedures. In an interactive but also didactic way, international and national experts present findings and coach the participants through all necessary steps that efficient risk and crisis management requires. Workshop on Recovery Techniques This workshop addresses the strategies and available instruments for the recovery of tourism destinations. It discusses and trains intensively the advantages and suitability of different recovery strategies and the wide array of possible techniques and instruments.
Duration:	2 - 3 days per workshop
Target beneficiaries:	National tourism administrations, national tourism organizations, civil protection authorities, officials from Ministries of interior-, foreign affairs, as well as the health and private sector.
Outputs/ deliverables:	Support tourism crisis management efforts at national level, and capacity building.

5.15 Development of Sustainable Tourism Campaigns

Objective:	To develop tourism campaigns to raise tourists' awareness on the need to contribute to sustainable development by making responsible holiday choices.
Methodology:	<p>The methodology builds on UNEP's Green Passport initiative to improve the tourism sector's efforts to communicate with tourists about sustainable tourism through campaigns based on sustainability issues. This promotes tourism that respects environment and cultural values, and brings economic and social benefits for host communities.</p> <p>Several consultative meetings and innovative tools make up the methodological approach at a destination level.</p>
Module 1:	develop communication materials for tourists <ul style="list-style-type: none">▪ travel guides▪ websites▪ postcards, leaflet and brochure
Module 2:	execute a field test of the materials in a key tourism destination by developing a local strategy to raise consumers' awareness. <ul style="list-style-type: none">▪ helping tourists minimize their footprints by choosing the least polluting form of transport, finding low-impact accommodation options, improving their energy efficiency at destinations, offsetting the inevitable carbon emissions of their trip, and providing sustainability tips to help improve livelihoods in host communities.▪ This product can be developed in conjunction with several capacity building activities, can work in parallel with awareness raising amongst stakeholders at a destination, and be developed to focus on a number of different target audiences.
(Optional) Module 3:	develop an innovative tool to promote the destination and tourism service and product providers participating in the project. This tool will provide tourists and locals with a selection of good addresses (sustainable /eco-friendly tourism products and services providers whose sustainable approach will be checked), practical advice for responsible travellers, maps and itineraries. Tourism product and services providers participating will receive capacity building on sustainable practices and the advantages of certification as a marketing/motivation tool both on a national and international basis. Participating hotels will receive an initial workshop that will guide them to implement action plans geared towards integrating sustainability.
Duration:	This depends on the size of the project, number of participants and degree to which sustainability has been included in tourism in the destination concerned.
Target beneficiaries:	National and regional tourism boards, private sector, other stakeholders (e.g. Destination Management Organizations, academia). Successfully implemented in; Brazil, Costa Rica, Ecuador, and South Africa. Currently being developed for Israel, French Overseas Territories.
Outputs/ deliverables:	Provision of a comprehensive platform on sustainable tourism products and services. Increased demand for sustainable tourism products and services.

5.16 Ecotourism Policies and Strategies

Objective:	Formulation of an ecotourism policy and strategy to guide all tourism ecotourism development, operations and management in order to meet the country's short and long term objectives and aiming to optimize the economic, social, cultural and environmental benefits stemming from ecotourism. The development of ecotourism, within the framework of sustainable tourism, can have a positive impact on income generation, job creation and education, and thus on the fighting against poverty and hunger, protection of the environment and the promotion of sustainable development, and can contribute directly to achieving the internationally agreed goals, including the MDGs.
Methodology:	<p>Five phase approach:</p> <p>Phase 1 – Preparation of a Report containing a detailed assessment of the current ecotourism scenario in the country, identifying policy constraints and challenges and identifying opportunities and benchmarks for the future growth of ecotourism in the country. The Report to be finalized in consultation with key stakeholders. The issues to be addressed include:</p> <ul style="list-style-type: none"> • Tourism and natural resources management (including on management of protected areas). • Legislation and regulation. • Product development and diversification (profile of nature related tourism products). • Marketing and promotion. • Economic impact of ecotourism and tourism investment. • Tourism infrastructure and superstructure. • Human Resource Development (capacity and skills in natural heritage management and interpretation for tourism) and, • Socio-cultural and environmental impacts of ecotourism. <p>Phase 2 – Formulation of a draft ecotourism policy and strategies.</p> <p>Phase 3 – Organization of a National Forum to receive feedback from stakeholders on the draft ecotourism policy.</p> <p>Phase 4 – Finalization of the ecotourism policy.</p> <p>Phase 5 – Formulation of an Ecotourism Strategy to implement the policy recommendations.</p>
Duration:	3 – 6 months.
Target beneficiaries:	National Tourism administration, provincial governments, destination management organizations and other tourism stakeholders (e.g. parks authorities).
Outputs/ deliverables:	A sound ecotourism policy and strategy for ecotourism development in consonance with sustainable development principles and practices.

5.17 Strengthening of Sustainable Tourism Governance

Objective:	To determine whether and how the policy framework in a country and/or destination facilitates the long term sustainability of tourism and identify gaps and needs for sustainable tourism governance and management, as well as a vision and recommendations for the most appropriate type of mechanisms and guidance for key stakeholders in the country and/or destination on options, scenarios and work plans to strengthen sustainable tourism governance and management.
Methodology:	This service, in principle, focuses on the country level, and if necessary can be concentrated on a particular destination in the country.
Phase 1 – Assessment	The assessment will start with an analysis of existing policy documents, regulations and other relevant written material relating to: tourism development and management, environment and natural resource management, including management of protected areas, -sustainable development policies, poverty reduction strategies, market trends and promotion, resource capacities, operation of tourism enterprises, -governance structures covering planning, development control, tourism operations and activities, direct management and community engagement.
Phase 2 – Field mission	A field mission is undertaken to carry out interviews with key stakeholders in order to investigate the extent to which policies and management in the country and destination are covering the main potential areas for interventions that can help achieve more sustainable tourism, how these policies and processes play on the ground and to identify barriers to their effective implementation. Areas of particular relevance to sustainable tourism include the articulation of overall sustainable development priorities and how tourism may relate to them; the presence of an overall tourism policy and the coverage it gives to sustainability; governance and management structures engaging a range of stakeholder interests, both at a national and local level (responsibility of the day-to-day management of the development process down to the various levels of governance.
Phase 3 – Action planning	Based on the conclusions and recommendations from the assessment, an action plan on sustainable tourism governance and management is prepared in a participatory manner, defining the follow-up activities needed for mainstreaming the long term sustainability of tourism into the policy and regulatory framework of a country/destination.
Phase 4 – Capacity building workshop	Based on the assessment and action plan, a capacity building workshop will be organized in the country/destination for representatives from the public sector, private sector and civil society with a stake in sustainable tourism. The workshop will provide guidance to the key stakeholders to examine options and scenarios for sustainable tourism governance, encourage them to collaborate, and provide with practical tools and examples to start implementing the main interventions proposed in the action plan.
Duration:	Three missions of 1 – 2 weeks (for assessment, action planning and capacity building), spread over a period of 4 – 6 months.
Target beneficiaries:	The public sector, private sector and civil society working in the field of tourism and sustainable development. Indirectly, local people in the destinations who may benefit from an improved sustainability of the tourism activities.
Outputs/ deliverables:	An assessment of the current state of sustainable tourism governance and management in a destination; an action plan outlining proposed actions to improve governance and management mechanisms with a view to facilitating the long term sustainability of tourism; and increased capacity of stakeholders from the public sector, private sector and civil society for follow up of the interventions proposed in the action plan.

Annex 2: Country development policy papers within international frameworks

The following are some of the main documents covering development policy and strategy that are prepared for developing countries in collaboration with international bodies.

The **Regional and Country Strategy Papers** are prepared by the European Union (EU) in consultation with beneficiary countries, involving their governments, regional and non-state bodies and other donors⁹⁵. The strategy papers are based on shared analysis of the specific regional or national problems, constraints and needs, leading to the definition of priority sectors for assistance, in line with existing national development plans and countries' poverty reduction strategies⁹⁶. They include detailed Multiannual Indicative Programmes.

The **Regional and National Indicative Programmes (RIPs/NIPs)**, included in the strategy papers and prepared by the EU in consultation with the beneficiary countries, are multiannual programming frameworks that identify a limited number of focal areas for EU intervention. They clearly delineate the objectives, available funding and areas for programme or project development for the two periods covering the programming cycle⁹⁷. While tourism is increasingly mentioned in the regional strategy papers as potential for development, only few RIPs/NIPs include specific sector-related interventions.

Common Country Assessment (CCA)⁹⁸ is the common instrument of the United Nations system to analyse the national development situation and identify key development issues. Both a process and a product, the CCA takes into account national priorities, with a focus on the MDGs and the other commitments, goals and targets.

United Nations Development Assistance Framework (UNDAF) emerges from the analytical and collaborative effort of the CCA and is the foundation for United Nations system programmes of cooperation. It provides a coherent and integrated response to national priorities and needs as the common strategic framework for the operational activities at country level. Broad screening of recent UNDAF reports⁹⁹ available show that 35-40% countries reference tourism's potential and contribution to development.

Poverty Reduction Strategy Papers (PRSP), initiated by the World Bank and the IMF in 1999 provide countries with 'an assessment of poverty and describes the macroeconomic, structural, and social policies and programmes that a country will pursue over several years to promote growth and reduce poverty, as well as external financing needs and the associated sources of financing'¹⁰⁰. Tourism features as a priority sector in the PRSP of many developing countries. According to Mitchell and Ashley expectations related to the tourism sector's economic benefits are reflected in 80% of PRSPs¹⁰¹.

⁹⁵ Programming - http://ec.europa.eu/europeaid/how/finance/programming_en.htm

⁹⁶ Joint declaration by the Council and the representatives of the governments of the Member States meeting within the Council, the European Parliament and the Commission on European Consensus on Development (European Union, 2006)

⁹⁷ Common framework for joint multiannual programming - http://europa.eu/legislation_summaries/development/general_development_framework/r13007_en.htm

⁹⁸ Definitions as defined by the UNGA and as cited by the official website of the UN-OHLLRS.

⁹⁹UNWTO Working Paper No.01 (draft) UNDAF- Tourism Inclusion and Resource mobilization through DaO Joint Programming, March 2012.

¹⁰⁰Poverty Reduction Strategy Factsheet - <http://www.imf.org/external/np/exr/facts/prsp.htm>

¹⁰¹Mitchell, J., A Ashley, C.(2010) Tourism and poverty reduction: pathways to prosperity, Earthscan, London

The Millennium Development Goals Report (MDGsR) presents data on countries actions related to the MDGs and their completion, addressing targets and indicators to map out the advancements of the process. It includes a number of indicators by which a country is able to evaluate its progress in terms relative to the MDGs. Tourism's contribution to the completion of MDGs (especially MDG 1- Poverty reduction, MDG 3- Gender Equality and Women Empowerment, MDG 8 – Environmental sustainability, and MDG 8 – Global partnership) has been highlighted in recent reporting.

Diagnostic Trade Integration Study(DTIS), the WTO's Enhanced Integrated Framework for Trade-Related Technical Assistance (EIF) 'evaluates internal and external constraints on a country's integration into the world economy, and recommends areas where technical assistance and policy actions can help the country overcome these barriers'¹⁰². EIF is operating in 47 LDC's. A review of 35 DTIS revealed that 30 countries under study prioritised the tourism sector. It concluded that a competitive tourism sector requires a coherent policy framework, efficient institutions, a proactive private sector and a national tourism development strategy that establishes cross-sectoral linkages.

Investment Policy Review conducted by UNCTAD is a framework for a country to attract and benefit from Foreign Direct Investment (FDI). Technical assistance is provided after an assessment report of the policy, regulatory and institutional environment for FDI in the country. To date 33 countries have been or are in the process of being assessed and tourism features in the studies of several countries (i.e. Rwanda, Ghana, Nepal, Tanzania, Benin amongst others).

¹⁰²Country Trade Diagnostic Studies -

<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/TRADE/0,,contentMDK:20615178~menuPK:1574524~pagePK:148956~piPK:216618~theSitePK:239071,00.html>

Annex 3: Areas of Government Influencing the Sustainability of Tourism

The following table lists various areas of government, which may be represented by different ministries or departments, and indicates how their responsibilities have a direct bearing on tourism.

Tourism	Overall development, coordination and implementation of tourism policy. Support for tourism development, management and marketing.
Prime Ministerial office	Tourism's position within the overall balance of policies and priorities.
Finance	Level of budgetary resources allocated to tourism. Tax policy.
Trade	Terms of trade negotiations. Export and investment promotion.
Economic Development	Sustainable development policies. Support for enterprise.
Environment and Natural Resources	Regulation and control of environmental impact. Conservation of biodiversity. Protected area management. Management of resources for ecotourism.
Transport	Accessibility, traffic management and sustainable transport issues.
Culture	Management and preservation of historic sites and cultural heritage.
Agriculture	Rural development and supply chain issues.
Education	Tourism training.
Health	Safety and social security issues, for visitors and employees.
Sport and Recreation	Promotion of attractions, activities, events, etc. Elements of domestic market.
Internal Affairs	Crime and security. Child protection. Immigration and visa requirements
Foreign Affairs	Source country-destination relationships. International and regional relationships in development.

Source: UWTO and UNEP (2005) *Making Tourism More Sustainable*

Annex 4: Value Chain Analysis to measure impact on the poor

Value Chain Analysis (VCA) analyses income flows in the tourism sector in a destination and assesses where and to what extent poor people participate at each point. It focuses on the dynamics of inter-linkages within the productive sector. It identifies opportunities to enhance local economic input and uncovers areas along the tourism value chain where the poor could become more involved, thus providing the basis for recommending pro-poor interventions. VCA also helps in the specification of poverty reduction targets of plans and policies, the collecting of data make a case for intervention to government and development agencies, and in monitoring and evaluation of the impact of the implementation.

An example of a simple VCA output is provided below.

a)	Sub-chain* E.g.:	Accommodation	Food and drink	Curios and craft	Transport, excursions
b)	Approx. turnover in destination per sub-chain per year	US\$....	US\$...	US\$.....	US\$....
	% accruing to local people %%%%
	Approx. income of local people	US\$	US\$	US\$%
c)	Main activities through which local people earn income (with approx income per group per year)	E.g. Hotel workers (US\$) Guest house workers (\$....)	Fishermen (\$....) Farmers (\$....)	Weavers (\$....) Vendors (\$....)	Taxi drivers (\$...) Boat owners (\$...) Guides (\$....)
d)	Conclusions regarding income flowing to poor households in the destination	E.g. relatively low. Some local poor employed in cleaning jobs.	E.g, High for local fishermen; relatively low for local farmers as most agricultural products are bought from outside the destination.	Low, only few weavers.	High for guides coming from poor households.
e)	Main opportunities to increase income earned by local poor		More fresh food supply and speciality food products	Develop tailor-made local crafts	Training of more local guides; developing new excursions

* sub-chains to be included in the table shall depend on the products available in the destination

Source: UNWTO (working document for COAST – Collaborative Actions for Sustainable Tourism – project in Africa)

The steps to take in undertaking a VCA involve assembling information and conducting interviews in the destination¹⁰³. This should cover:

- A broad over view of the economic activity in the area
- An inventory of tourism facilities and services, including places where visitors may spend money such as heritage sites, craft markets and cultural events
- An assessment of the nature of poverty – who are the poor and where are they located
- Identification of types of tourist activity and types of spending (sub-chains)
- Surveys of businesses to investigate their performance, employment, supplies and other contact with poor communities
- Consideration of the visitor markets, including a survey of tourists to gain a picture of their spending
- Aggregation of the results and drawing conclusions.

¹⁰³ A detailed description is contained in UNWTO and SNV (2010b) *Manual on Tourism and Poverty Alleviation: Practical Steps for Destinations*

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