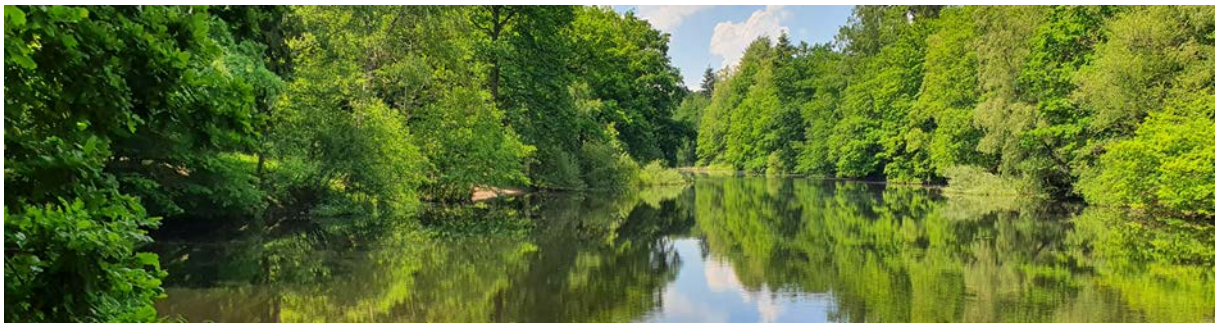
European SME Going Green 2030 Report

Review and analysis of policies, strategies and instruments for boosting sustainable tourism in Europe



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Text and Content:

The ETGG SME Going Green 2030 Report was developed under the leadership of the Centre for Sustainable Tourism of the Eberswalde University for Sustainable Development (HNEE) with the contribution of the following authors:

European and Global Chapter, Summary and conclutions: Martin Balas, Heike Dickhut, Dagmar Lund-Durlacher, Cinzia de Marzo, Herbert Hamele, Gordon Sillence and Anna Tenger

National Chapters: Ulrike Pröbstl-Haider, Alice Wanner, Melanie Feilhammer and Barbara Diallo-Strobl (Austria), Elona Pojani (Albania) Elka Dogramadjieva, Mariana Assenova, Gueorgui Stoev and Radenka Mitova (Bulgaria), Jelena Durkin (Croatia), Roncak Miroslav (Czech Republic), Kristof Tomej (Denmark), Pekka Alhojärvi (Finland) Francesca Cominelli (France), Heike Dickhut and Anna Tenger (Germany), Gábor Bódis (Hungary), Cinzia de Marzo, Saverio Primavera and Paola Zuccolo (Italy), Eke Eijgelaar, Paul Peeters, Tamina Reinecke (Netherlands), Krzysztof Szpara (Poland), Jorge Martins (Portugal), Carmen Chasovschi and Simina Manea (Romania), Maria Gordeyeva, Elena Seredina and Anton Mosalev (Russia), Macià Blázquez Salom (Spain), Fabian Weber and Melanie Wyss (Switzerland), Dilek Hale Sipahi Aybar (Turkey)

Editorial work:

Eberswalde University for Sustainable Development – Centre for Sustainable Tourism
Heike Dickhut, Anna Tenger

Picture credits:

Herbert Hamele (Title page)

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1 Introduction

1.1 Background and Intention of the report

Work Package 1 of the Europeand Tourism Going Green (ETGG) 2030 project involves the development and preparation of the **"European SME Going Green 2030 Report"** with the objective of providing an overview of Europe-wide action on the state and development of sustainable tourism at different levels, with a particular focus on small and medium enterprises (SMEs). In addition to information on the political framework for sustainable tourism at global and at European levels, the emphasis of the report is on national chapters that are to describe and analyse the current situation of sustainable tourism in general and of SMEs in particular.

These **national reviews** should cover information regarding relevant stakeholders, policies and strategies as well as activities and instruments linked to sustainable tourism development at national level. Furthermore, they should address core achievements as well as challenges and opportunities regarding the development of sustainable tourism, possibly taking into consideration the implications of the COVID-19 crisis.

More **detailed reports** are to be delivered on the six participating project countries (Austria, Bulgaria, Croatia, Germany, Italy, and Romania). These detailed reports are to be elaborated in cooperation with the ETGG2030 project partners who will contribute, in addition to the analysis outlined above, information on relevant sustainable tourism policies and activities on the regional level as well as information on capacity building systems, funding programmes and other instruments that support SMEs with respect to sustainable tourism.

1.2 Methodology of the report

As described above the main task was to write up a national report on the present sustainable tourism situation of your country that is relevant to SMEs. This report will be incorporated as a national chapter into the overall ETGG SME 2030 Report.

The national reports are to be structured uniformly (see below). They should be up to 10 pages long for smaller countries and up to 15 pages for larger countries, plus annexes including e.g. information sources, list of stakeholders, partners, etc. (Excel Work Sheet, see below). Proper names, e.g. of institutions or organisations, are to be translated and written in English with the original title to be put in brackets written in italics right behind it.

Detailed task description and instructions for the authors of the national reports:

In this following paragraph the tasks and instruction are presented as they have been handed out to the authors of the report in order to asure a consistent procedure.

The task mainly comprises the following steps and assignments:

1.) Conduction of an inventory and analysis of the (sustainable) tourism situation in your country. Following the structure of the national reports (see annex 1) your review should take the following information into consideration (if existent):

- **Political framework for sustainable tourism** and description of the most relevant **policies and strategies** referring to sustainable tourism and SMEs in your country at national level
- **Key stakeholders** including the following organization categories:
    - Governmental bodies and semi-governmental bodies
    - Tourism associations
    - Relevant research and educational bodies
    - NGOs, Sustainable Tourism Networks and Partnerships (with a focus on SMEs)
    - Individual tourism businesses and destinations of particular relevance for their sustainability efforts
- **Specific activities and instruments** for the development of sustainable tourism, again with a special focus on SMEs, covering, among others, the following:
    - Sustainable tourism initiatives, projects or campaigns
    - Marketing and information services supporting sustainability in tourism
    - Tourism sustainability certification systems and awards
- **Summary and conclusions** regarding the national situation in your country taking into account the following aspects:
    - Ambitions and achievements regarding sustainable tourism and the role of SMEs in it
    - Challenges for the development of sustainable tourism and for SMEs
    - Prospects and challenges with regard to the (post-) COVID-19 situation.
    - Recommendations for boosting sustainable tourism for SMEs
- **Reference List**

The document with the structure for the entire report as well as for the national chapters was provided to all of the authors. in annex 1 and may also be downloaded via the link below.

2.) Writing up the report according to the structure provided by bundling the information and summarizing the most essential aspects reflecting a general overview of the sustainable tourism situation in your country. Presentation of selected meaningful examples in your text, where appropriate.

3.) In case the university is located in one of the **participating project countries** the national chapters were elaborated jointly with the respective consortium partner.

4.) In addition to the report document, a **work sheet** (Excel-Document) had to be provided to document any collected data and information.

5.) Taking part in the agreement processes with regard to the draft and final report version, as well as the revion and completion of the report version.

1.3 Structure of the report

The ETGG SME 2030 Report comprises in total five chapters. Chapter 1 introduces the report. The two following chapters (2 + 3) outline the global and European policies for the development of sustainable tourism. In Chapter 4 the national reports of the partner countries are presented. Chapter 5 deals with the post-COVID-19 Future of Sustainable Tourism in Europe including reflections on post-COVID tourism and resilience and sustainability. The final chapter (6) summarized central aspects of the national reports and draws conclusions regarding the future develppment of sustainable tourism and SMEs in Europe.

2 Global Guidelines for the Development of Sustainable Tourism

Heike Dickhut, Dagmar Lund-Durlacher, Gordon Sillence and Anna Tenger

2.1 Principles of Sustainable Tourism

In 2005, the UNWTO published a guide together with the UNEP, in which a total of twelve development goals or principles for sustainable tourism are defined and which are still used worldwide (see Fig. 1). They are briefly outlined below (cf. UNEP/UNWTO 2005):

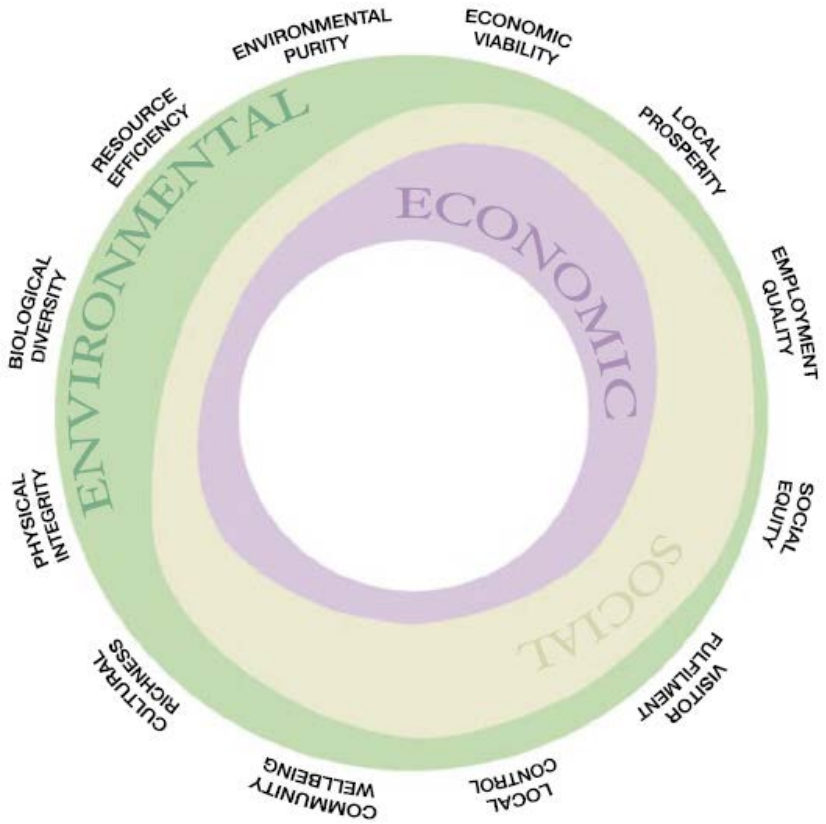

Figure 1: Principles for sustainable tourism (UNWTO/UNEP 2005)

Tourism companies and destinations only contribute to the creation of local or regional prosperity if they act in an economically viable manner. The expenditures of tourist should as far as possible remain within a regional destination; the economic and social benefits should as widely as possibly be distributed within a community and also benefit underprivileged parts of the local population.

The tourism offer must meet the demands of the visitors and be experienced without endangering the health of the guests. Visitors must not be discriminated. When planning and managing tourism the needs of the local population are to be taken into account. The communities also benefit in terms of infrastructural improvements through the develepent of tourism in their region (e.g. health and supply facilities). Exploitation of residents through tourism is prevented (e.g. sex tourism).

The tourism industry respects and promotes the historical heritage of the destination and its original characteristic features (culture and traditions). At the same time, it contributes to the preservation and improvement of the landscape and townscape as well as to nature conservation (protected areas, habitat protection, wildlife protection) and avoids damage to the environment with its activities. The use of scarce or non-renewable resources as well as the emission of pollutants and the contamination of water and landscape is reduced to a minimum in the scope of the development and operation of tourism infrastructure (e.g. hotels) and in the implementation of tourism activities (e.g. transport).

Tourism should create qualified and appropriately paid jobs with the best possible working conditions in a region. Companies should not discriminate employees based on their gender, age, race or similar (for all princiaples see UNEP/UNWTO 2005).

The implementation of the principles of sustainable tourism requires the use of both soft and hard control- and steering instruments. Tourism in a region can only be made more sustainable in the long term if all stakeholders work together at the best of their ability. Important stakeholders here are:

- Tourism companies such as tour operators/agents, transport companies, accommodation and catering establishments, leisure facilities, etc. (Possible control instruments: design of offers and information, voluntary commitments), Actors in sustainable tourism
- Administrative bodies, ministries, parliaments (possible control instruments: funding, legislation, taxes, fees).
- Tourism organisations, lobbyists/interest groups (possible control instruments: information and educational work, projects, initiatives, competitions; aim: influencing politicians, companies and consumers),
- Schools, universities, research institutes (possible control instruments: education, information and educational work in teaching, research) and
- the demand-side (influence: appropriate travel behavior).

2.2 Policies and Strategies for Sustainable Tourism

Strong leadership and effective international policies for sustainable tourism are needed to maintain a positive and intact natural, cultural, social and economic environment for the tourism industry. There are a number of international organizations, governments, and non-governmental organisations which take on this leadership role and have developed a series of guidelines, policy papers and recommendations for sustainable tourism development over the past 30 years. Therefore, a few organizations and tourism stakeholders that operate on a global level to foster sustainable tourism within the frame of specific guidelines will be presented in the following.

Of particular note is the **United Nations World Tourism Organization (UNWTO),** which is the United Nations agency consisting of representatives of the private business sector, tourism associations, tourism authorities and educational institutions which is responsible for

promoting sustainable tourism policies worldwide (UNWTO, n.d.-a), and the **World Travel and Tourism Council (WTTC),** a forum of travel and tourism industry leaders to discuss and formulate global travel and tourism policies to "raise awareness of the full economic and social impact and potential of travel and tourism" (WTTC, 2021a). The UNWTO and WTTC very often work together to respond to current issues, challenges and crises.

As the leading international governmental organisation, the **UNWTO** is responsible for promoting sustainable and inclusive tourism as a driver of economic growth. Due to its 159 member states and thus global reach, the UNWTO provides not only networking and partnership possibilities but rather supports the tourism sector and its development by providing assistance in tourism policy integration, capacity building and knowledge transfer on a global level.

The focus of the UNWTO lies on the major topics “Sustainable Development”, “Competitiveness”, “Innovation, Investment and Digital Transformation”, “Ethics, Culture and Social Responsibility” and “Technical Cooperation”. In addition to that, the UNWTO functions as a global platform for tourism statistics and offers opportunities for training and job creation in the tourism sector via its UNWTO Academy (UNWTO, n.d.-a). Through international conventions, programmes as well as initiatives and publications, the UNWTO contributes to sustainable tourism development on multiple levels. A first milestone on sustainable tourism policies was released together with the United Nations Environment Programme (UNEP) in 2005, the *Making Tourism More Sustainable: A Guide for Policy Makers* (UNWTO & UNEP, 2005). Furthermore, the UNWTO contributed to the development of the first international standard on accessible tourism for all named *ISO 21902 Tourism and related services – Accessible tourism for all – Requirements and recommendations*, published by the International Organization for Standardization (ISO) in 2021 (UNWTO, n.d.-b). Another relevant publication is the *UNWTO Global Guidelines to Restart Tourism* which was published in 2020 by the organisation to assess and visualize the impact of the corona pandemic on international tourism and provide guidelines to cope with respective challenges in recovering. At the same time, the UNWTO started a collaboration with the World Health Organisation (WHO) to form a “*Global Tourism Crisis Committee*” consisting of key UN agencies, the chairs of its Executive Council and Regional Commissions, and private sector leaders. The committee’s purpose is to provide assistance and guidance to the tourism sector while building a foundation for future resilience and sustainable growth (UNWTO, 2020b).

Another relevant stakeholder and driver of sustainable development is **The United Nations Environment Programme (UNEP)** which functions as the leading global environmental authority. The purpose of the UNEP is to “provide leadership and encourage partnership in caring for the environment by inspiring, informing, and enabling nations and peoples to improve their quality of life without compromising that of future generations” (UNEP, n.d.). Besides the already mentioned milestone document *Making Tourism More Sustainable: A Guide for Policy Makers*, the UNEP contributes worldwide on multiple levels to sustainable development including programmes and initiatives linked to sustainable tourism such as the *Global Tourism Plastics Initiative* in collaboration with the UNWTO and The One Planet Network.

The **World Travel and Tourism Council's (WTTC)** mission is to "maximise the inclusive and sustainable growth potential of the Travel & Tourism sector by partnering with governments, destinations, communities, and other stakeholders to drive economic development, create jobs, reduce poverty, security, and understanding in our world" (WTTC, 2021a). The organisation therefore focuses on three key initiatives "*Security and Travel Facilitation*", "*Sustainable Growth*" and "*Crisis Preparedness, Management & Recovery*" and collaborates with public and private stakeholders to foster destination stewardship and enable the growth of travel and tourism (WTTC, 2021b). To contribute to the tourism recovery, the WTTC launched the *SafeTravels Protocol initiative* as well as the world's first health and hygiene Stamp *SafeTravel Stamp* to identify destinations and businesses that comply with global health and hygiene standards (WTTC, 2021c).

The **Organisation for Economic Co-operation and Development (OECD)** is an international organisation that works for better policies and better lives. Its aim is to shape policies that promote prosperity, equality, opportunity and well-being for all. For the tourism industry, the OECD analyses and monitors policies and structural changes that affect the development of domestic and international tourism. A range of reports, policy briefs, articles and digital data provide its members and partners with knowledge that they can use to inform policy decisions in their countries (see OECD). One of its most important publications is the *OECD Tourism Trends and Policies*, the latest edition of which was published in 2020 (OECD, 2020). Considering the most recent challenges caused by the COVID-19 pandemic, the paper *Managing tourism development for sustainable and inclusive recovery* was published which calls for a greater policy focus on the environmental and socio-cultural pillars of sustainability. Five policy solutions were recommended which aim to: i) rethink tourism success, ii) adopt an integrated policy-industry-community approach, iii) mainstream sustainable policies and practices, iv) develop more sustainable tourism business models, and v) implement better measure to better manage (OECD, 2021).

The **United Nations Educational, Scientific and Cultural Organization (UNESCO)** is a global organisation that promotes and contributes to international cooperation and development in education, science, culture and communication and information. As an active participant in the implementation of the global Agenda 2030 Sustainable Development Goals (SDGs), the UNESCO manages international programmes and provides a network to exchange knowledge and ideas regarding educational tools, scientific projects and cultural heritage and equal dignity. **The UNESCO World Heritage and Sustainable Tourism Programme** "represents a new approach based on dialogue and stakeholder cooperation where planning for tourism and heritage management is integrated at a destination level, the natural and cultural assets are valued and protected, and appropriate tourism developed" (UNESCO World Heritage Centre, 2021). In 2016 in collaboration with the UNEP, the UNESCO published the report *World Heritage and Tourism in a Changing Climate* which examines the impact of climate change on tourism and World Heritage as well as provides a basis for taking action (ibid.).

The **Food and Agriculture Organization (FAO)** is a specialized agency of the United Nations whose purpose is to fight world hunger and malnutrition by leading programmes and global initiatives focusing on food access, security and quality for all. The FAO, bringing together 194

member states, operates in over 130 countries and is especially engaged in achieving the common Agenda 2030 Sustainable Development Goals SDG1 “No poverty” and SDG2 “Zero Hunger”. Based on this, the FAO launched the *initiative Hand-in-Hand* that focuses on identifying and supporting countries in need to “accelerate agricultural transformation and sustainable rural development” (FAO, 2021). Via its five Principles “Target the poorest”, “Matchmaking”, “FAO mandate and SDG targets”, “Provide a framework” and “Partnerships”, the initiative strengthens international cooperation and provides countries with the highest rates of poverty and hunger with guidance and support to take action (ibid.). In the context of sustainable tourism, the FAO and the UNWTO collaborate to boost sustainable rural tourism, strengthen rural economies and conserve ecosystems as agreed on in the so called “Memorandum of Understanding” (UNWTO, 2020a).

2.2.1 Sustainable Consumption and Production, the Circular Green Economy and Green Tourism

Worldwide, the tourism industry has a significant impact on the global and local environment, e.g., through pollution and waste, depletion of natural resources and increasing greenhouse gas emissions, and can threaten healthy ecosystems and habitats of flora and fauna that form the basis for tourism activities (UNEP, 2019).

To avert or reduce damage, tourism operations have to be transformed into low carbon and resource-efficient operations along the whole tourism supply chain which requires circular and sustainable production and consumption practices.

The **circular economy model** aims to optimise resource use and thus reduce greenhouse gas emissions, focusing on avoiding waste and using materials, resources and products as long as possible in the entire value chain. Similarly, the circular economy model aims to build and secure human and social capital through the creation of fair jobs and through a more equal and equitable distribution of resources and financial capital. Circular economic practices therefore offer a suitable set of tools for achieving the Sustainable Development Goals and thus for sustainable development (Einarsson & Sorin, 2020).

The principles of the circular economy are effective in all sectors of the tourism industry. In capital-intensive sectors such as accommodation, catering, and transport, the most important lever for circular transformation is circular procurement, i.e., the procurement of equipment and inputs suitable for maintenance, reuse, remanufacturing, and recycling. This enables tourism value chains to transform into low Co_2 and resource-efficient operations.

For service-oriented tourism sectors such as travel agencies and tour operators, the possible lever for transformation is clear market positioning and differentiation oriented towards circularity and cooperation. Targeted storytelling, awareness raising, dialogue with customers, business partners and stakeholders in destinations aim to promote circular initiatives along the entire tourism value chain and thus achieve a positive impact (Einarsson & Sorin, 2020).

The circular economy offers the tourism industry a transition to a resilient and sustainable tourism system and has the potential to significantly optimise resource use and reduce greenhouse gas emissions, while creating competitive advantages for businesses and thus contributing to higher value creation. A significant decoupling of resource use from economic

value creation takes place and a positive contribution is made to the regeneration of natural (through the elimination of waste and negative impacts on the ecosystem) and human capital (e.g., through innovation, learning and skilled jobs). At the same time, higher resource productivity along tourism service chains leads to higher value creation in the form of cost reductions, reduced risks, new product and service innovations, and new revenue streams.

The realization that the long-term goal of a shift towards circularity and sustainable consumption and production patterns (SCP) on a global level requires commitment and international cooperation of both developed and developing countries, led to the adoption of **the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns (10YFP)** at the UN Conference on Sustainable Development (Rio+20) in 2012. Covering the period 2012-2022, the 10YFP shall enable the UN member states to develop, exchange and thus multiply innovative and effective approaches to accelerate sustainable consumption and production. To ensure the implementation of the 10YFP the multi-stakeholder partnership **The One Planet Network** was formed. Through its six programmes *Public Procurement*, *Buildings and Construction*, *Tourism*, *Food Systems*, *Consumer Information*, and *Lifestyles and Education*, the One Planet Network functions as a platform to guide, measure, and monitor the worldwide shift to SCP patterns (The One Planet Network, n.d.-a).

After the adoption of the Agenda 2030 Sustainable Development Goals (SDGs) and a Mid-term Review of the 10YFP, the Network published the 5-year strategy "*One Plan for One Planet*" for the period 2018-2022 to strategically address and implement the transformation towards sustainable consumption and production in alignment with Goal 12 of the Agenda 2030.

Part of this strategy is *The Sustainable Tourism Programme* of the One Planet Network supporting initiatives which decouple tourism's growth from the increased use of natural resources and promoting circularity and sustainable consumption and production as keys to advance the 2030 Agenda (UNEP, 2019). Besides **The Global Tourism Plastics Initiative** that aims at reducing Tourism's global plastic pollution, a major focus of the Sustainable Tourism Programme lies on the restart of the tourism sector due to the recent challenges of the COVID-19 pandemic. Therefore, the **One Planet Vision for a Responsible Recovery of the Tourism Sector** promotes and recommends actions for supporting a more sustainable and (crisis-) resilient tourism sector in pandemic and post-pandemic times (The One Planet Network, n.d.-b).

The document *Indicators of Success* of the One Planet network not only demonstrates the process and methodology to achieve a worldwide shift towards SCP patterns, it also provides "a breakdown of the concept of SCP into more tangible elements or 'SCP impact areas' such as biodiversity protection and sustainable land use, energy efficiency, greenhouse gas emissions reduction, water use efficiency and waste reduction (World Tourism Organization and United Nations Environment Programme, 2019, p.7).

The *Indicators of Success* methodology served as well the *Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies* that was released by the UNWTO and UN Environment Programme to advance the integration of Sustainable

Consumption and Production into tourism policies by recommending five strategic approaches, "including using the SDGs as a guiding framework and prioritizing SDG 12 for multiplier effects, outlining SCP policy instruments to pave the way towards implementation, supporting the regular and timely measurement for effective implementation, incorporating geospatial data to visualize the interactions with the environment and embracing other innovative approaches, particularly circularity" (World Tourism Organization and United Nations Environment Programme 2019, p. 60-67). Furthermore, the report "presents for the first time a global assessment of the presence of SCP policy instruments in national tourism policies and sets – therefore, a baseline" (World Tourism Organization and United Nations Environment Programme, 2019, p.6).

2.2.2 Tourism and the Agenda 2030 Sustainable Development Goals (SDG)

In 2015, the United Nations established the Agenda 2030 for Sustainable Development and the 17 Sustainable Development Goals (SDGs) which provide a new and comprehensive vision for sustainable development until 2030. Their predecessors, the eight Millennium Development Goals (MDGs), were in place from 2000 to 2015 and all had specific, measurable targets across a broad spectrum of poverty reduction, human development and environmental sustainability. The SDGs differ from the MDGs, although they build on them both conceptually and institutionally. The scope of the SDGs is broader and they aim to engage multiple interests and actors from the public and private sectors as well as civil society (Hwang & Kim, 2017). The 17 Sustainable Development Goals (SDGs) are further refined to 169 targets which address economic, social and environmental aspects. As the SDGs are not legally binding, governments are supposed to create national frameworks for achieving the 17 goals. The primary responsibility for reviewing progress towards the goals lies with the individual countries, which requires high-quality, easily accessible and timely data collection. Though the SGDs are universally accepted by various governments, their success relies heavily on activities and collaboration with the business sector and civil society (Woodbridge, 2015). Multi-stakeholder partnerships are key to the successful implementation of the SDGs. Such stakeholder groups work across sectors including governments and engage in projects, initiatives, advocacy, knowledge sharing, and monitoring of the 2030 Agenda. Prioritising sustainable production and consumption also has a positive impact on the success of the SDGs. This can be achieved by developing sustainable and inclusive economic models. Successes within the SDGs, which are particularly cross-cutting, can best be achieved through effective vertical integration i.e., cooperation between all levels of government and involvement of key stakeholders (Woodbridge, 2015).

The major challenges for the successful implementation of the SDGs are, on the one hand, the likelihood that national governments only focus on the goals that are in line with their existing development agenda and thus miss the integration potential associated with the SDGs. On the other hand, collecting, analysing and disseminating data to monitor the achievement of the goals is a major hurdle for many countries (Woodbridge, 2015).

Three SDGs explicitly mention sustainable tourism.

In SDG 8 “Decent Work and Economic Growth” the **Target 8.9** states “By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products” which refers to tourism’s contribution to job creation and also recognizes tourism as one of the driving forces of global economic growth (UNWTO, 2015, p. 2).

Goal 12 of the SDGs generally addresses the issue of "sustainable consumption and production". A tourism sector that adopts "sustainable consumption and production patterns" (SCP) can play an important role in accelerating global change towards sustainability. This reflects **Target 12.b** of SDG 12, namely to "develop and implement tools to monitor the impact of sustainable development on sustainable tourism that creates jobs and promotes local culture and products" (UNWTO, 2015, p. 1).

As already mentioned, the “Sustainable Tourism Programme” (STP) of the One Planet Network aims at developing such SCP practices.

Within SDG 14 “Conserve and sustainably use the oceans, seas and marine resources for sustainable development” the **Target 14.7** states “by 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism”. This means that tourism development must be a part of “Integrated Coastal Zone Management in order to help conserve and preserve fragile marine ecosystems and serve as a vehicle to promote a blue economy” (UNWTO, 2015, p. 1).

UNWTO also considers that tourism may be relevant in many more goals and targets beyond those that explicitly mention sustainable tourism. The private sector in tourism plays an important role in the implementation of the SDGs. While the private tourism sector can internalise and contribute to all 17 SDGs, its activities mainly relate to SDGs 1, 4, 8, 12, 13, and 14., which deal with "No Poverty", "Quality Education", "Decent Work and Economic Growth", "Responsible Consumption and Production", "Climate Action", and “Healthy Marine Ecosystems. Some tourism businesses have also recognised that aligning business objectives with the SDGs can lead to greater efficiency, cost savings and competitiveness (UNWTO & UNDP, 2017).

2.2.3 Networking, Clustering and Knowledge Transfer - The Need for Collaborative Action

If the 80s and 90s were all about desktop computer networking, and the 00s and 10s gave us online information-sharing communities, then the 20s and 30s are proving to be the age of network clustering and the full development of a global knowledge economy. This has been recognised at the global level since the beginning of the Millennium when the UN's **World Summit on Sustainable Development** promoted the concept that sustainability cannot be achieved without collaboration between government, business and civil society stakeholders.

For **knowledge transfer** Nicolopoulou (2011) proposes a theoretical framework in the domain of sustainability, which consists of three perspectives: intergenerational, collaborative innovation, and diversity. In this model, the intergenerational perspective takes into account that different generations may have different viewpoints towards sustainability, whereas the collaborative innovation perspective is about transferring “[…] knowledge from a more

'developed' context, into a 'developing' context […] proactively seeking to engage local stakeholders in the 'problem identification' as well as 'solution creation' space" (Nicolopoulou, 2011, pp. 530-531). Lastly, the diversity perspective looks at the extent to which human resource management (HRM) practices are in line with and/or supportive of sustainability knowledge transfer practices (Nicolopoulou, 2011).

A case example is the **'Tourism Research Innovation and Next Generation Learning Experience' (TRIANGLE)** initiative (Gunter & Zekan 2019). TRIANGLE is a so-called Knowledge Alliance originally established in 2017 between four higher education institutions from different EU member countries, as well as three non-academic partner institutions (European Commission, 2017a). These Knowledge Alliances are funded by the European Commission through 'Key Action 2: Innovation and Good Practices' within its Erasmus+ Programme (European Commission, 2017b). Their goal is: "to foster innovation in and through higher education together with businesses, and beyond, contributing to new approaches to teaching and learning, entrepreneurship in education, and the modernisation of higher education systems in Europe" (European Commission, 2017b, Key Action 2: Innovation and good practices).

For **collaboration and networking**, the **UN World Summit on Sustainable Development** in 2002 developed the concept of **'Type 2 Partnerships'** for the implementation of Agenda 21, based on the complex formula of '**Tripartite Partnerships'**. This evolved in 2012 at **Rio20+** - into the concept of '**Voluntary Initiatives for Sustainable Development'**. In 2015, as part of the Millennium Goals update and merger with Agenda 21 process, this concept was updated in **Agenda 2030** through the development of **SDG 17- 'Partnerships for the Goals'** which has initiated the era of collaborative networking at all levels of territorial activity:

'A successful development agenda requires inclusive partnerships — at the global, regional, national and local levels — built upon principles and values, and upon a shared vision and shared goals placing people and the planet at the centre.'

There are three global sustainability networks outlined below.

The One Planet Network

As already mentioned, The One Planet Network has been the UNs main collaborative multi-stakeholder response in the tourism sector, being a joint effort between the UNWTO and UNEP to involve a range of civil society NGOs in a global networking and knowledge transfer programme. It has become an SDG 12 hub in terms of sustainable consumption and production (SCP) in tourism.

'The One Planet Sustainable Tourism Programme supports the transition towards a circular economy as a pathway for the sustainable development of tourism'. The One Planet Sustainable Tourism Programme aims to accelerate sustainable consumption and production (SCP) in tourism policies and practices to address the challenges of pollution, biodiversity loss and climate change. It promotes knowledge sharing and networking opportunities to define collective priorities and identify solutions.'

Global Council for Sustainable Tourism (GSTC)

The **GSTC** is the world's leading collaborative network supporting the development of tourism sustainability through certification. The GSTC is an independent NGO organization composed of national and provincial governments, travel companies, hotels, tour operators, NGO's, individuals and communities – all looking to implement third party-assessed sustainable tourism. Since 2009 it has been able to bring the qualitative debate on what is a sustainable tourism business into a series of 37 quantitative criteria with over 150 indicators covering governance, economic environmental and cultural issues (see the Industry Criteria for Hotels and Tour Operators). The GSTC now also provides a set of destination criteria for territorial management that supports MSME sustainability certification processes.

The Travel Green Planet Initiative

Ecotrans, the European Network for Sustainable Tourism Development, has spent over 25 years working with the UN, EU and national governments to make tourism more sustainable through the implementation of *multi-stakeholder, multi-sector and multi-level sustainability knowledge transfer* based on ICT networking. Having created the world's largest **3rd party certified sustainable tourism market place** (with currently over 16,000 certified businesses globally) on its knowledge networking platform **Tourism 2030**, they launched the **Travel Green Planet Initiative** at the ITB in 2019 to both upscale their EU work to the global level and develop an international cluster of tourism stakeholders with an interest in tourism supply chain certification. The initiative has developed an innovative **Travel Green App and Mapping System** for destinations to map certified businesses on a local to global scale in the 2020 – 2030 Decade of Implementation of Agenda 2030 and share the information to cluster participants and travellers alike (see Destinet).

In the framework of the **European Tourism Going Green 2030** project the Tourism 2030 Portal is being developed as a **local- to-global tourism SCP supply chain certification clustering tool**. Information is collected collaboratively through the clustering process and provides b2b, b2g and b2c knowledge transfer in the form of local to global maps of a country or region's MSME development of certified sustainable and responsible tourism offers (see Destinet https://destinet.eu/who-who/destinet-users).

2.3 International Milestones of Sustainable Tourism

This chapter highlights the major milestones in international cooperation on sustainable tourism and state the respective outcomes (political papers, declarations, programmes, etc.):

Table 1: International Milestones and outcomes regarding sustainable tourism

Year	Milestone	Outcomes relevant for tourism
1992	United Nations Conference on Environment and Development	Rio Declaration on Environment and Development, Agenda 21 (defining sustainable development)
1995		"Lanzarote Charter for Sustainable Tourism" (WTO, UNEP, UNESCO, EU)
1996/99		"Agenda 21 for the Travel & Tourism Industry": Towards Environmental Sustainable Development "Global Code of Ethics for Tourism" (UNWTO,

Year	Milestone	Outcomes relevant for tourism
		WTTC)
1997	International Conference of Environment Ministers on Biodiversity and Tourism, Berlin	Berlin Declaration on biological diversity and Sustainable Tourism
2000	Millenium Summit	Millennium development goals (MDGs)
2002	International Year of Ecotourism	Québec Declaration on Ecotourism
2002	World Summit on Sustainable Development, Johannesburg, South Africa	UNWTO sets up the Sustainable Tourism for Eliminating Poverty (ST-EP) Initiative
2004	Seventh meeting of the Conference of the Parties, Kuala Lumpur, Malaysia	International Guidelines for Sustainable Tourism in relation to biodiversity (CBD/CSD)
2006	UNEP Governing Council, Dubai	Launch of the International Taskforce on Sustainable Tourism Development (ITF-STD) as part of the Marrakesh process
2007	Second International Conference on.Climate Change and Tourism, Davos, Switzerland	Davos Declaration on climate change (UNWTO/UNEP/WMO)
2008	IUCN World Conservation Congress, Barclona, Spain	Foundation of the Global Sustainable Tourism Council (GSTC) and introduction of the GSTC-Criteria
2011	First Annual Meeting of the Global Partnership for Sustainable Tourism (UNEP/UNWTO)	Official launch of the Global Partnership for Sustainable Tourism (GPST) as a successor to the ItF-STD
2012		Green Economy Report including a chapter on tourism
2014	World Travel Market (WTM), London	Official launch of the 10 YFP Sustainable Tourism Programme
2015	United Nations Sustainable Development Summit 2015	Agenda 2030 and Sustainable Development Goals explicitly mentioning tourisms

Source: Own compilation, referring to Beyer et al. (2017)

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3 European Policy for the Development of Sustainable Tourism

Gordon Sillence, Cinzia de Marzo and Herbert Hamele

3.1 Policy Guidelines and Strategies for the Development of Sustainable Tourism

The European Union has positioned itself as a global leader in sustainable tourism, but it is their overall sustainable development strategies that provide an overarching policy framework for the European tourism sector to be developed in a sustainable and responsible manner. This report chapter restricts itself to identifying those policies that specifically relate to MSME (Micro Small and Medium Enterprise) sustainability at European level. Furthermore, it takes into account the impacts of the coronavirus pandemic and its devastation of the industry, seeking to emphasise practical measures tourism stakeholders can take to support the European MSME transition from unsustainable practices to greener and more socially equitable economic performance.

Owing to the many and diverse sectoral and thematic issues related to sustainable tourism, relevant policy guidelines and strategies are produced by several directorates, following almost two decades of economic, environmental and culturally oriented policy lines that link the EU to the UN global agenda for sustainable development (originally conceived **as Agenda 21 in 1992** and now reformulated in 2015 as the **2030 Agenda** with is widely published 17 **Sustainable Development Goals** [SDGs]). Europe has embraced these goals and strives to reflect them in the renewal of existing policies that are applicable to the current socio-economic climate.

For the purposes of this MSME-focused report, the EU's contemporary overarching guidelines and strategies are best viewed via the implementation of three current key pillars of EU policy interventions at this point of the UN's 2030 Agenda, namely:

- the European support for the Agenda 2030 Sustainable Development Goals,
- the European Green Deal and
- the EU's Post-COVID-19 Recovery Funds.

All three give guidance to member states on how national stakeholders apply the EU's structural funds set aside for European regional development, and other EU sector- or thematic-specific programmes which have been fully augmented by the EUs socio-economic support strategies for its sectors, regions and citizens.

Additionally, there are several cross-cutting sectoral and thematic policies that affect tourism SME recovery opportunities, and readers of this report should be aware of the multiple sustainability implementation opportunities of combining tourism with all other economic sectors in order to use sustainable tourism development as a vector of overall sustainable development. Policies for tourism sustainability can involve key regional policies as well as sector and thematic issues. The following list offers a non-exhaustive range of policy areas that can be combined with planning and implementing sustainable tourism activity.

Sectoral

- Agriculture farming and food policy

- Communications - digital economy ICT (Information and Communications Technology)
- Construction – built environment and spatial planning
- Energy – renewables
- Transport – inter modal systems
- Waste management - circular economy
- Education and training for entrepreneurial development – EU knowledge economy

Thematic

- Environmental concerns regarding pollution, climate change and biodiversity,
- Labelling and certification for sustainability
- Social inclusiveness
- Trans-boundary developments in the EU

A selection of policies and initiatives covering these issues are highlighted in more detail in the following section on activities and instruments for sustainable tourism, where this report attempts to bring together EU guidance that will allow tourism SMEs to recover from the sudden and unforeseen collapse of the sector in March 2019 at the outset of the global pandemic, when border closers, citizen lock downs and restrictions. Knowledge of such policies will provide greater insight into how to shape regional economies and sector development in the coming decade in a more coherent, joined up manner.

3.2 Key Stakeholders

This policy guidance is aimed at those with an interest in the sustainable development of tourism, i.e. the stakeholders in the industries and destinations where tourism takes place. At the heart of tourism sustainability are the tourism related MSMEs themselves, which are centreed in but not confined to the tourism sector alone, as, for example, food suppliers, energy providers, transport companies, etc, are all connected to tourism sector development. Therefore, it is useful to take a territorial as well as sectoral approach to identifying which stakeholders are key to boosting tourism SME sustainability, and a cross-section of destination stakeholders provide the mosaic of activities that EU policy targets.

Importantly in this mix of stakeholder interests, given the nature of the task of sustainable development implementation and how it has been defined by the COSME process, sustainability information providers in the training and education sectors must be included in such a listing, alongside private and public sector business support organizations. To include such a diverse grouping of actors, the **ETGG Going Green 2030** project has defined a tourism SCP certification cluster development methodology that identifies such stakeholders and brings them together at the appropriate territorial level.

The following generic listing of stakeholders reflects those public institutions and organizations who would best endorse and represent such a cluster at the EU level.

EU Commission (DG Growth, DG Regio, DG Environment, DG Mare, DG Education and Culture, DG Clima, DG Connect, DG Transport

Regional Policy Macro regions (Adriatic and Ionian, Baltic, Danube, Alpine) and other related policies such as Mediterranean, EaP countries (Azerbaijan, Ukraine, Moldova, Belarus, Georgia, Armenia) and Black Sea area.

Country Level

- National Economic Ministries
- National Environmental and ecological transition Ministries
- National Training & Education systems
- National Ministries of technology and digital transition
- Protected Area Management Bodies
- Certification bodies (public and private)
- National Councils for Sustainable development
- Regional Coordinating Committees
- Local Authorities
- Chambers of commerce
- MSMEs
- Travelers and visitors
- Researchers, experts, consultants,
- NGOs

Specifically, the following bodies reflect the European stakeholder dealing with different type of tourism (sustainable, rural, maritime, cultural, eco-tourism, accessible, wellness &spa, nautical, city and transport) across Europe, which can be complementary with the others listing above:

- European Travel Commission – ETC (lead of European Tourism Manifesto)
- European Travel Agents' and Tour Operators' Associations – ECTAA
- European tourism association – ETOA
- EUROCHAMBRES
- Professional Association of experienced Tour Managers – IATM
- The European Technology and Travel Services Association – ETTSAμ
- European Network for rural development- ENRD
- EUROGITES
- European Network for accessible tourism- ENAT
- European Alliance for Responsible Tourism and Hospitality – EARTH
- OITS – Organisation international du tourisme social
- European SPA association- ESPA
- Conference of Peripheral Maritime Regions - CPRM
- Cruise Lines International associations- CLIA
- Insular European network of chambers of commerce- INSULEUR
- Baltic Sea Tourism Forum
- FARNET
- Observatory on tourism for islands economy- OTIE

- EUROPA NOSTRA
- International Institute of Gastronomy, Culture, Arts and Tourism – IGCAT
- European Cultural Tourism Network - ECTN
- EUROCITIES
- IRU
- The European Cycle route network- EUROVELO
- EUROPARC FEDERATION
- Network of european Regions for a Sustainable and Competitive Tourism- NECSTOUR
- MEDPAN (Mediterranean Protected Area Network)

3.3 Activities and Instruments for sustainable tourism at European Level

The following section identifies and lists key policies that can be used by destination and business administrators and civil society to formulate national, regional and local approaches to MSME support. The name, source, date, reference, and a brief description are given for each policy.

COVID-19 Recovery

Name of Policy: Establishing a European Union Recovery Instrument to support the recovery in the aftermath of the COVID-19 crisis

Source of Policy: Council Regulation

Date of publication: 14.12.2020

URL link to policy source

Brief description in relation to SME green development

'The support under the instrument established by this Regulation (the 'Instrument') should in particular focus on measures to restore labour markets and social protection as well as health care systems, to reinvigorate potential for sustainable growth and employment and support their transition towards a green and digital economy, to provide support to businesses affected by the impact of the COVID-19 crisis, in particular small and medium-sized enterprises, as well as support for investment in activities that are essential for strengthening sustainable growth in the Union including direct financial investment in enterprises, measures for research and innovation in response to the COVID-19 crisis, for capacity building at Union level to enhance future crisis preparedness, for maintaining efforts to ensure a just transition to a climate-neutral economy, and support for agriculture and development in rural areas in addressing the impact of the COVID-19 crisis.'

This plan aligns all the following instruments and polices to meet the immediate pandemic crisis whilst also continuing to develop medium- and long-term sustainability through the following policies:

Sustainable Development Policies

Name of Policy: *Next steps for a sustainable European future: European action for sustainability*

Source of Policy: Commission Communication

Date of publication: 22.11.2016

URL link to policy source: COM (2016)739

Brief description in relation to SME green development

'The circular economy (SDG 6, 8, 9, 11, 12, 13, 14, 15) offers a transformative agenda with significant new jobs and growth potential and stimulating sustainable consumption and production patterns. Focus on resource efficiency and minimising waste in a context of rapid global resource depletion gives the EU a competitive edge and stimulates innovation. It creates local jobs, at all skills levels and with opportunities for social integration. The transition to the circular economy offers a chance for Europe to modernise its economy, making it more future proof, green and competitive.'

Name of Policy: *Key European action supporting the 2030 Agenda and the Sustainable Development Goals*

Source of Policy: Commission Staff Working document

Date of publication: 22.11.2016

URL link to policy source: SWD (2016) 390 final

Brief description in relation to SME green development

'With its circular economy package, the EU aims to address economic and environmental concerns by maximizing efficiency in the use of resources, covering the whole value chain and through innovation, thereby enabling the development of **new markets and business models**. As such it contributes to sustainable economic growth.'

NB The overarching sustainable development policy line has recently been updated in the *EU Sustainable development report 2020*

Name of Policy: *Setting up the multi-stakeholder platform on the implementation of the Sustainable Development Goals in the EU*

Source of Policy: Commission Decision

Date of publication: 22.05.2017

URL link to policy source: C (2017) 2941 final

Brief description in relation to SME green development

'The multi stakeholder platform provide a forum for exchange of experience and best practice on the implementation of the Sustainable Development Goals across sectors and at local, regional, national and Union level, where stakeholders can engage in debates about sustainable development and provide information about related successful initiatives, mobilising expertise of key sectors.'

Environmental Policies

Name of Policy: *The European Green Deal*

Source of Policy: Commission Communication

Date of publication: 11.12.2019

URL link to policy source: COM (2019) 640 final

Brief description in relation to SME green development

'The EU has the collective ability to transform its economy and society to put it on a more sustainable path. It can build on its strengths as a global leader on climate and environmental measures, consumer protection, and workers' rights. While the circular economy action plan will guide the transition of all sectors, action will focus in particular on resource-intensive sectors such as textiles (including tourism), construction, electronics and plastics. Reliable, comparable and verifiable information also plays an important part in enabling buyers to make more sustainable decisions and reduces the risk of 'green washing'. Companies making 'green claims' should substantiate these against a standard methodology to assess their impact on the environment, setting circular economy standards, including efficiency standards and standards for less waste and greater re-use. An expansive view of circularity might suggest that it comprises transformations towards sustainable energy and jobs as well as towards sustainable food, land and ocean. The **Circular Economy Action Plan** sets the right priorities covering product design, production, marketing, waste and recycling. It aims to integrate a broad range of existing policy instruments, including the **Eco-design Directive, the EU Ecolabel, and EU Green Public Procurement criteria**.'

Name of Policy: *Closing the loop - An EU action plan for the Circular Economy*

Source of Policy: European Commission Communication

Date of publication: 02.02.2015

URL link to policy source: COM (2015) 614 final

Brief description in relation to MSME green development

'The **circular economy** will boost the EU's competitiveness by protecting businesses against scarcity of resources and volatile prices, helping to create new business opportunities and innovative, more efficient ways of producing and consuming. **Food waste takes place all along the value chain: during production and distribution, in shops, restaurants, catering facilities**, and at home. Addressing the measurement issue is an important step towards a better understanding of the problem, a coherent monitoring and reporting as well as effective exchange of good practices across the EU. Awareness campaigns are needed to change behaviour. The Commission supports awareness raising at national, regional and local levels and the dissemination of good practices in food waste prevention.'

Climate Change & Tourism

Name of Policy: *Stepping up Europe's 2030 climate ambition investing in a climate-neutral future for the benefit of our people*

Source of Policy: Commission Communication

Date of publication: 17.09.2020

URL link to policy source: COM (2020) 562 final

Brief description in relation to MSME green development

Achieving 55% greenhouse gas emissions reductions will require actions in all sectors, including tourism. EU policies have been put in place, or are being reoriented to contribute to the 'do no harm' principle and the transition to climate neutrality. Mainstreaming of climate policy objectives into other EU policies is a key enabler and will allow for an inclusive transformation based on a just transition. EU citizens, businesses and social partners require increased certainty and predictability on the pathway towards climate neutrality. Therefore, the Commission is amending its proposal for the first European Climate Law today, adding a 2030 target of at least 55% net greenhouse gas emissions reductions compared to 1990.

Name of Policy: *Climate friendly travel*

Source of Policy: Annual ambitious report: Baseline 2020 for climate neutral 2050

Date of publication: September 2019

URL link to policy source

Brief description in relation to MSME green development

'To drive the agenda forward, goals and ambitions at the global and sector level are essential. With this in mind, SUNx will produce a Registry of Climate Friendly Travel – an inventory of climate neutrality systems used by the international community generally and by Travel & Tourism organisations specifically to move to a 1.5°C target in 2050. The Registry will show community and company plans for greenhouse gas reduction as well as changes over time while the annual report will highlight good practice examples of systems and programmes.

Name of Policy: *A Clean Planet for all A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy*

Source of Policy: Commission Communication

Date of publication: 28.11.2018

URL link to policy source: COM (2018) 773 final

Brief description in relation to SME green development

The transition also requires further scaling-up of technological innovations in energy, buildings, transport, industry and agriculture sectors. It can be accelerated by breakthroughs in digitalisation, information and communications, artificial intelligence, and biotechnology. The expansion of new systems and processes, with cooperation across sectors, is also required. A good example of such system-oriented approaches is the circular economy, which will harness

a range of advanced solutions and **foster new business models**. It will also require cooperation at different levels among regions and among Member States to maximise synergies by pooling resources and knowledge together.

Name of Policy: *Governance of the Energy Union and Climate Action*

Source of Policy: Regulation (EU) 2018/1999 of the European Parliament and of the Council

Date of publication: 11.12.2018

URL link to policy source: Official Journal of the European Union L 328/1

Brief description in relation to SME green development

Article 11: Multilevel climate and energy dialogue - Each Member State shall establish a multilevel climate and energy dialogue pursuant to national rules, in which local authorities, civil society **organisations, business community, investors and other relevant stakeholders** and the general public are able actively to engage and discuss the different scenarios envisaged for energy and climate policies, including for the long term, and review progress, unless it already has a structure which serves the same purpose. Integrated national energy and climate plans may be discussed within the framework of such a dialogue.

Environment – Biodiversity

Name of Policy: **LIFE Programme for Environment and Climate Action (LIFE)**

Source of Policy DG Environment LIFE-2021-2024

Date: July 2021

URL: Circular Economy and Quality of Life - Standard Action Projects (SAP) (LIFE-2021-SAP-ENV)

Nature & Biodiversity - Standard Action Projects (SAP) (LIFE-2021-SAP-NAT)

The LIFE Programme covers both Nature and Biodiversity and s climate change though measures taken to create the circular economy: 'The aim is to facilitate the transition toward a sustainable, circular, toxic-free, energy-efficient/climate-resilient economy and toward a toxic-free environment as well as to protect, restore The LIFE Programme also covers Nature and Biodiversity and improve the quality of the environment.'

Tourism Sector-Specific Policy

Name of Policy: *EU strategy for sustainable tourism*

Source of Policy: European Parliament Resolution

Date of publication: 25.03.2021

URL link to policy source: (2020/2038(INI))

Brief description in relation to SME green development

'The EU Parliament calls on the Commission to encourage Member States to temporarily set reduced VAT rates on travel and tourism services, accompanied by a special **stimulus package**

for all micro enterprises and SMEs for the 2020-2024 period to foster the transition towards a more digital and sustainable tourism ecosystem. Furthermore, it calls on the Commission, together with the European Investment Bank, to establish sufficient dedicated support for the decarbonisation of the tourism sector, for digitalisation and for innovative projects, and the conditions of **access for micro enterprises and SMEs to InvestEU**, so that new skills can be acquired and more quality jobs created and notes that their uptake requires adequate **funding for tourism establishments, in particular micro enterprises and SMEs**.'

NB Please note there is a full tourism funding online guide at
https://ec.europa.eu/growth/sectors/tourism/funding-guide_en

'This online guide highlights the wide range of funding programmes financed by the new budget, Multiannual Financial Framework 2021-2027, and Next Generation EU. With these resources and this guide, we're supporting the move towards a more digital, sustainable and inclusive EU. The guide will help you find appropriate funding. It contains links to relevant EU programme websites with the latest developments (such as annual work programmes or call for proposals) and further details per programme. For inspiration, you can also see concrete project examples funded by previous EU programmes.'

Regionally-based Cluster Policy

Name of Policy: *Recommendation Report*

Source of Policy: Commission Communication – European Expert group on cluster development

Date of publication: 2021

URL link to policy source: http://www.europa.eu; Homepage | European Cluster Collaboration Platform

Brief description in relation to SME green development

'Many traditional SMEs are less successful in adopting green business models than larger companies. They suffer from limited capacities, resources, time and available knowledge to invest and deal with the related regulations and standards. At the same time, many innovative SMEs have a strong potential to develop breakthrough green solutions, but they often have difficulties in finding the right financing and partners **Clusters can be useful in helping SMEs** to meet the above challenges. They can support SMEs in finding the right funding in terms of debt (loans, guarantees) and equity instruments. They can assist in opening the doors to new markets (both within Europe and globally), and in partnering with multinationals and large corporates to develop demonstration projects of their green solutions. Clusters can also help innovative SMEs exploit the business opportunities based on the increasing demand for green products, technologies, services and business models

Transport Policy

Name of Policy: *Tourism and transport in 2020 and beyond*

Source of Policy: Commission Communication

Date of publication: 13.05.2020

URL link to policy source: COM (2020) 550 final

Brief description in relation to MSME green development

Within the sustainable and digital transition, SMEs will need particular attention. As announced in the recent SME Strategy, the Commission will work with networks across Europe such as the Enterprise Europe Network, the European Clusters Alliance and European Digital Innovation Hubs to **support sustainability and digitalisation and help local tourism companies become more resilient and competitive**. This requires cross-sectoral linkages, interdisciplinary knowledge flow, stronger connections and capacity building to ensure accelerated uptake of product, services and process innovations. These networks shall also connect tourism with other industries to accelerate uptake of new solutions, foster cross sectoral investments in tourism ecosystem with ICT, renewable energies, health and life sciences, agri-food, maritime, cultural and creative industries, including the media sector.

Transboundary, Cross-border Policy

Name of Policy: *Europe's moment: Repair and Prepare for the Next Generation*

Source of Policy: Commission Communication

Date of publication: 27.05.2020

URL link to policy source: COM (2020) 456 final

Brief description in relation to SME green development

Europe must focus on enhancing its strategic autonomy, economic security and potential for job creation. The Commission is proposing a new Strategic Investment Facility to support cross-border investments to help strengthen and build European strategic value chains. It will incentivise European industrial and business leadership in several key ecosystems, notably those linked to the twin green and digital transition. This will strengthen the Single Market, underpin the new EU industrial strategy4 and contribute to a more circular economy.

Certification, labelling and benchmarking

Name of Policy: *Reference document on* ***best environmental management practice*** *- BEMP, sector environmental performance indicators and benchmarks of excellence for the tourism sector under Regulation* (*EC*) *No 1221/2009 on the voluntary participation by organisations in a community ecomanagement and audit scheme* (*EMAS*)*.*

Source of Policy: Commission Decision

Date of publication: 15.04.2016

URL link to policy source: Official Journal of the European Union L 104/27

Brief description in relation to SME green development

'Best Environmental Management Planning - BEMP - is to undertake an assessment of the most important direct and indirect environmental aspects associated with the organisation,

and to apply relevant performance indicators and compare with relevant benchmarks of excellence. Applicability This BEMP is applicable to all tourism actors, including destination managers, tour operators, accommodation providers, food and drink providers, transport operators and activity providers. This BEMP is also fully applicable to small enterprises.'

Name of Policy: *Research for TRAN Committee - European Tourism Labelling*

Source of Policy: European Parliament- TRAN Committee

Date of publication: 2018

URL link to policy source: Research for TRAN Committee - European Tourism Labelling - Think Tank (europa.eu)

Brief description in relation to MSME green development

'Quality labelling in the EU Currently, there is no database on quality labelling schemes in the EU. Based on the Centre for European Policy Studies (CEPS) study for the EC, it is reasonable to estimate that there are up to 100 labels related to quality in the EU, covering aspects such as culture, recreation, hygiene, and other elements along the quality value chain. Quality labels have been created in the tourism sector both by public authorities and by private organisations. It is possible to identify some general trends in the criteria for quality labelling. These tend mainly to concern services provided rather than organisational issues, with customer satisfaction surveys seen as very important in improving quality standards. Human resource policies are also seen as a significant element of the criteria for quality labelling.

Name of Policy : *The implementation of the Circular Economy Action Plan*

Source of Policy : European Commission Report

Date of publication : 26.1.2017

URL link to policy source : COM (2017) 33 final

Brief description in relation to SME green development

Food waste is a key area in the circular economy and should be addressed at many levels along the value chain. The Commission launched a stakeholder's platform on food waste prevention, made progress in developing an EU methodology to measure food waste, and prepared EU guidelines to facilitate food donations and the use former foodstuff as feed. The platform will be the key forum at EU level to support all players in identifying and taking actions needed to achieve the Sustainable Development Goals commitment to halve food waste per capita by 2030. It gathers 70 members representing public authorities and all actors along the food value chain, including food banks and other NGOs.

3.3.1 Initiatives and projects

European level tourism SME sustainability initiatives and projects are largely driven by European Commission funding programmes, although many private sector initiatives also exist, specifically in the field of corporate social responsibility and risk assessment. DG Grow, DG

Regio, DG Education and Culture and DG Environment stimulate several projects and initiatives which can be found via their programme project lists.

Commission's Regional SME support

The Commission's DG GROW and REGIO has been making the horizontal links between many of these Directorate's programmes, and the COSME programme is specifically focused on support MSME sustainability. Fostering synergies with Eurostat via the Commissions Virtual Tourism Observatory work can be seen in the Cluster Collaboration Platform, which supports MSME development through specific regionally based clustering of multi-sector stakeholders to develop improved MSME supply chain and market access.

COVID 19 Resilience for the tourism ecosystem

Currently a commission consultation is in process based on the Staff Working Document "*Scenarios towards co-creation of transition pathway for tourism for a more resilient, innovative and sustainable ecosystem"*. Stakeholders have been invited to reflect and contribute to the scenarios for 2030 and list key enablers for the transition of the tourism ecosystem. (cf DG GROW website until 15 September 2021 see also their online survey.)

CSR - Responsibility and Reporting Requirements

Name of Initiative: *Proposal for a Directive of the European Parliament and of the Council as regards corporate sustainability report*

Source: Commission Communication

Date of publication: 21.04.2021

URL link to policy source: COM (2021) 189 final

Brief description in relation to SME green development

'The Non-Financial Reporting Directive (Directive 2014/95/EU, the NFRD), amending the Accounting Directive, was adopted in 2014. The European Commission committed itself to proposing a revision of the Non-Financial Reporting Directive in the European Green Deal and its 2020 Work Programme.6 The European Green Deal aims to transform the EU into a modern, resource-efficient, and competitive economy with no net emissions of greenhouse gases by 2050. Better data from companies about the sustainability risks they are exposed to, and their own impact on people and the environment, is essential for the successful implementation of the European Green Deal and the Sustainable Finance Action Plan. By making companies more accountable for and transparent about their impact on people and the environment, this proposal can also help strengthen relations between business and society. It will also create opportunities for companies, investors, civil society and other stakeholders to radically improve the way sustainability information is reported and used thanks to digital technologies.

Multi-stakeholder collaboration across European Member States – the Tourism Manifesto

Name of Initiative: *Call for action: accelerate social and economic recovery by investing in sustainable tourism development*

Source: European Travel Commission- Tourism Manifesto

Date of publication: 9.02.2021

URL link to policy source

Brief description in relation to SME green development

'The "renovation wave of tourism businesses" - Support the development (e.g. consultancy assistance and support) of tourism businesses' roadmaps, introducing science based targets – setting greenhouse gas emission reduction targets in line with climate science – to achieve carbon neutrality by 2050 and secure future-proof growth (with a focus on aviation, cruises, tour vehicles, leisure activity providers, accommodation and offices, including retail facilities). In parallel, pilot and upscale next generation technologies to drive both a sustainable as well as a digital transformation.

International Action for Agenda 2030

Name of Initiative: *Proposal for a new European Consensus on Development Our World, our Dignity, our Future*

Source of Policy: Commission Communication

Date of publication: 22.11.2016

URL link to policy source: COM (2016) 740 final

Brief description in relation to SME green development

'The EU and its Member States will work with the domestic and international private sector, including employers' and workers' organisations, to promote responsible, sustainable and effective approaches. The private sector should engage in responsible and sustainable activities that contribute to the implementation of the 2030 Agenda. The EU and its Member States will promote the mobilisation of private resources for development in areas with significant transformation potential for sustainable development, including sustainable agriculture, clean energy, resilient infrastructure, health, green and circular economy and digitalisation.

Clustering Policy



Figure 2: The Tourcoop cluster being developed at the EU level to Support SME Sustainability through the COSME programme

Initiative TourCoop

To diversify the EU tourism offer, the European Commission has offered co-funding through the COSME programme to sustainable transnational tourism products. Six projects are being co-financed under the 2019 call for proposals 'Boosting sustainable tourism development and capacity of tourism SMEs through transnational cooperation and knowledge transfer' (COS-TOURCOOP-2019-3-01). To make best use of the EU funding and to create synergies these projects are working towards:

- sharing research into post COVID-19 sustainable tourism sharing tools and good practice examples
- sharing dissemination channels and events
- agreeing in country strategies where necessary
- formulating a common set of tools and services in a post project clustering process
- and piloting the European Sustainable Tourism Cluster as a driver for achieving the SDGs

3.3.2 Certificates and Awards Operating in Europe

This section lists those certificates that can be used by SME and destination stakeholders operating in Europe (see also Certification chapter in "European Tourism Labelling")

Table 2: Sustainable tourism labels in Europe for accommodation and camping [2017] (Hamele/ECOTRANS, 2017)

Name	No. certified in Europe (estimated)	GSTC recognised[1]	GSTC approved[2]
GLOBAL	**9,598**	**8**	**2**
Biosphere Responsible	30	1	1
EarthCheck	150	1	1
eco hotels certified	115	-	-
Green Globe	150	1	-
Green Growth 2050 - Travel	15	1	-
Green Key	1,500	1	-
Green Pearls Unique Places	50	-	-
Green Tourism	1,200	-	-
GT Active	33	1	-
TourCert	5	1	-
Travelife	350	1	-
TripAdvisor Green Leaders	7,000	-	-
EUROPEAN	**2,946**	-	-
BioHotels	90	-	-
Blaue Schwalbe	100	-	-
Certified Green Hotel	107	-	-
ECEAT Quality Label	1,300	-	-
ECOCAMPING	240	-	-
European Ecolabel for tourist	789	-	-
Green Brands	10	-	-

[1] GSTC recognized: "GSTC regonized means that a sustainable tourism standard has been reviewed by GSTC technical experts and the GSTC Assurance Panel, and deemed equivalent to the GSTC Criteria for sustainable tourism." (GSTC 2021)

[2] GSTC approved: "GSTC accredited means that a Certification Body (CB) awards certification according to processes that comply with international standards and good practices." (GSTC 2021)

GreenSign	60	-	-
Nordic Swan	250	-	-
NATIONAL	**3,904**	**3**	**-**
Austrian Ecolabel for Tourism	220	1	-
Bio-Siegel Germany	100	-	-
David Bellamy Conservation	587	-	-
DEHOGA Umweltcheck,	88	-	-
ECO Certification, Malta	22	1	-
écogîte France	644	-	-
Ecolabel Czech Republic	9	-	-
EcoLabel Luxembourg	40	-	-
Eco-Lighthouse, Norway	1,200	-	-
Eco-Romania	45	-	-
Ecotourism Norway	1	-	-
Gites Panda, France	227	-	-
Green Certificate, Latvia	89	-	-
Green Choice, Greece	7	-	-
Green Star Certificate, Turkey	121	-	-
HI Quality & Sustainability	3	1	-
ibex fairstay, Switzerland	57	-	-
Legambiente Turismo, Italy	300	-	-
Slovenia Green	14	-	-
Small and family run „ECO	4	-	-
VIABONO, Germany	126	-	-
TOTAL	**16,684**	**13**	**2**

4 Europe-Wide Action on Sustainable Tourism – National Reports

4.1 Albania

Elona Pojani
(As of August 2021)

Tourism is recognized as one of the main engines of the Albania's economic development. According to the Economic Impact Report of 2018 of the World Travel and Tourism Council (WTTC), the tourism sector recorded a direct contribution of $ 1.12bn, accounting for about 8.5% of the Gross Domestic Product (GDP). Including indirect multiplier effects, the total contribution of the sector is accounted at $ 3.47 billion, or about 26.2% of the GDP. In terms of employment, the tourism sector employs directly about 7.7% of the total labour force in Albania. Indirectly, during 2017, the tourism and travel industry generated a total of 291,600 jobs, accounting for 24.1% of total employment. Investments in this sector accounted for about 7.5% of all investments in the country (MTE, 2019).

The sector has experienced a constant growth since 1990, with a few bad years. For example, in 1997, the highly destabilized political, economic, and social situation of the country, following the collapse of pyramid schemes, affected tourism figures. The 2020-2021 pandemic period had major drastic impacts on the global tourism industry. The impact was evident as well in Albania that experienced a shrink in one of its most high developing sectors of the decade.

Modern tourism policy is a relatively new concept in Albania. The country's history defines among other issues also the tourism framework development. During the communist period, Albania was an isolated country. Its tourism sector was controlled by the state through the state enterprise specialized in domestic and foreign tourist service "Albturizmi". Albturizmi was established in 1955 with headquarters in Tirana and branches in different districts of the country (Fjalori Enciklopedik Shqiptar, 1985). During this period, international tourism was practically non-existent. In fact, within 1960-1990, Albania only accounted for 1.6% of all foreign tourists visiting the Balkan Peninsula (Humolli & Vishi, 2016). Domestic tourism was basically the only category of tourism. However, tourism within the country was also limited, restricted to honeymoons or summer vacations, due to the centralized, demographic movement policy and insufficient income of the population (Ciro, 2019).

With the collapse of the communist regime and the shift towards a free market economy, the tourism sector began to enhance. Self-isolation and curiosity to see the most secluded places in Europe drew regional and international tourism attention. At the same time, increased incomes (including remittances) and increased modes of transport and frequency impacted the growth of domestic tourism, which accounted for about 76% of the overall tourist numbers for 1993 (Humolli & Vishi, 2016). At the same time, the process of development of policies, laws, and institutional framework for tourism, began its path. The process was very dynamic and not always successful. In fact, the market-economy area saw a very chaotic development in the tourism sector and an inability of the law, especially in the first decade after the fall of

communism, to prevent damage. The main problems were related to the absence of territorial plans, which led to illegal buildings, lack of potential to implement sector strategies, high level of informality and low capacities in terms of infrastructure to support tourism and human resources (Ciro, 2019). Nowadays, there is a clear evidence of negative impact, some of it irreversible, brought by uncontrolled sprawling development along the coastal zones of Durrës, Golem, Sarandë, and to a lesser extent, in Velipojë and in Vlorë. These developments are associated with reduction and pollution of coastal resources, loss of the terrain from untreated sediments of waste, pollution of the sea from direct sewage discharge, loss of scenic landscapes and seascapes, loss of free spaces in exchange of residential buildings, erosion of coastal areas due to unsuitable constructionsn as well as reduction of biodiversity and natural habitat. Such developments have also exerted negative social impact by fading out the local traditions and converting the local economy into a monoculture type of development. Last, but not least, conflict over resources ownership has become part of the everyday Albanian discourse (Pasko, 2016).

This report presents an overview of the tourism sector in Albania, focusing especially on the issues of sustainable tourism and the role of SMEs in the sector.

4.1.1 Political framework for Sustainable Tourism

The first time that a Ministry of Tourism was created was in 1991, and it was named “Ministry of Domestic Trade and Tourism”. In 1993, the Ministry of Tourism was established. After that, the Ministry in charge of the tourism sector has been re-organized on many occasions during the transition period. Currently, the Ministry of Tourism and Environment is responsible for the tourism sector.

Besides the institutional framework development, legislation in the field of tourism began to take shape after 1990. The first law dedicated to tourism passed in pluralist Albania was Law No. 7665, dated January 21, 1993 ‘For the development of priority areas in tourism’. The law focused on the ‘stimuli’ concept, providing definitions on the typology of activities, persons, areas, and structures considered as fundamental in stimulating tourism development in the country (Ciro, 2019). Importantly, the law introduces the concept of the Committee for the Development of Tourism, an inter-ministerial structure designed to govern this sector. Further, the law sought to encourage foreign investments based on the provisions of Law No. 7594, dated August 4, 1992 ‘On Foreign Investments.’ The second Law on Tourism passed in 2007, defining, among other things, a regulatory framework for the management of the tourism sector and the development of standards for touristic products and services. In 2015, the new Government, showing high support for the development of the sector, started drafting new strategies, project and programmes in support of tourism. A new Law “On Tourism” was approved in 2015, addressing numerous issues raised by the business community and tourism experts and introducing, for the first time, clear definitions of key concepts, procedures, certifications, and licenses for business entities operating in the tourism sector, along with a classification of accommodating structures. The law was followed by a new law, No.114/2017 ‘Amendments to the Law No. 93/2015’, which introduced legislative incentives to facilitate the construction of luxurious four- and five-star hotels and resorts. On the legislative level, other

particular laws have the purpose to promote investments in the tourism sector, agro-tourism and urban and rural development. The Law No. 55/2015, 'On Strategic Investments' aimed specifically at increasing investments in strategic sectors, which included energy, agriculture, tourism, and natural resource extraction (as per Article 8). The law is expected to create the preconditions required for the attraction and retention of strategic investors and a 'fast track' for the processing and approval of strategic investment projects. A Secretariat of the Strategic Investments Committee (AIDA) is responsible for approving the status of each potential strategic investor and orienting potential investment interest from abroad. The law also foresees the creation of a Register of Strategic Investments (Law No. 55/2015b, Art. 10), where all completed strategic investment projects are listed.

The legislation was supported by the development and implementation of strategies in the field of tourism. In total, 6 strategies have been developed, the newest of which is the 2019 Strategy for the Sustainable Development of Tourism 2019 – 2023 (MTE, 2019). Previous strategies covered a longer period of time, but all of them were discontinued half-way, either because new parties came to power, or because they were substituted with new versions. All the strategies, despite their forward-looking aims and goals, including sustainable tourism, were not realistic considering the other developments in the country, especially those related to the real estate sector. This, among other issues, caused their discontinuation and replacement with newer versions.

The current 2019 strategy promotes and supports the development of sustainable tourism. It includes a total of 5 sessions: Analysis of the current situation in tourism sector, Strategy vision, Policy and Specific Goals, Financial Sources and Implementation and Monitoring.

The first session analyses the tourism sector, defining its role in the economy of the country, the components of Albanian tourism, as well as the sector problems and challenges. It defines three categories of tourism products: Coastal Tourism, Natural Tourism and Thematic Tourism. It further analyses the contribution of the sector to the economic development of the country, projecting the long-term direct contribution of the sector to the GDP to reach 9.3% in 2028, while total contribution (direct and indirect) is projected to reach 28.9% of the GDP. An interesting analysis of the problems and challenges of the sector defines the following issues:

- Lack of accommodation capacities and lack of qualitative accommodation
- Lack of popular hotel "brands" and tour operators
- Lack of tourist infrastructure
- Lack of standardization and systems of classification
- Short tourism season
- Informality in tourism activities
- Solving the problem of ownership
- Lack of private capital investment hinders consolidation of the sector
- Lack of training of employees in the tourism sector
- Limited connections between air and sea transport
- Poor infrastructure at destination
- Lack of development of an offer included in a tourist destination

- Poor use of Information Technology.

Addressing these issues and the challenges they pose, the second and third sessions define the vision, mission, aim, and goals of the strategy for development of sustainable tourism. It presents a generic vision of the strategy, elaborated as follows: “Albania, as a hospitable, attractive and authentic destination, for sustainable development of country’s economic, natural and social potentials”. Its strategic goals are divided into four distinct groups: ‘Creation of new development industries and clusters as well as consolidation of the tourism offer and creation of new products’, ‘Increasing the added value and impact of the sector on the economy and employment’, ‘Development of new products and services in tourism, as well as improvement of their quality’ and ‘Improving the image of the country and promoting authentic local products’ (MTE, 2019). The economic outputs of the implementation of this strategy include ambitious goals regarding the contribution of the sector to the economic development and employment, the amount of revenues generated by the sector, the foreign direct investments that the sector could attract and the contribution of the public investments in tourism in the 5-year horizon of the strategy.

The fourth session of the strategy defines the financial strategy for achieving the strategic goals. Considering the limitations of the state budget, donor funding in the form of grants or loans, as well as all other financing types of capital and technical and operation assistance are considered in the financing strategy.

The final session of the strategy defines responsibilities and tools to implement and monitor the achievement of each specific goal. The Thematic Group on Tourism and Culture Development along with the Prefectures of the Regions, headed by the deputy minister at the Ministry of Tourism and Environment, based on the Prime Minister's Order No.157, dated 22.10.2018 “On taking measures for the implementation of a sector-wide/cross-sectoral approach, and the establishment and functioning of an integrated sector/cross-sectoral mechanism”, will take over the implementation and monitoring process. The main monitoring tool will be the Performance Evaluation Matrix, which will provide a clear overview of the progress made in achieving each strategic goal, measured through measurable indicators. This matrix will include the baseline value, annual benchmarks, final goal and method of verification.

In addition to the main strategic document for sustainable tourism development, tourism development was also upheld as a strategic sector in the other following strategies prepared in 2015 (MTE, 2021):

- **National Strategy for Development and Integration 2015-2020**: The document lists the main challenges facing the sector, including the implementation of standards, the quality of tourism services and facilities, the development of tourism products, the lack of cooperation and effective coordination between actors that are or could be an integral part of the tourism industry. Specific challenges include: (1) the need for greater integration of tourism planning and tourist destinations; (2) addressing weaknesses related to the range and quality of tourism products; (3) developing a more favorable legal and institutional environment for the absorption of domestic and

foreign private investors; (4) the need for a more comprehensive and strategic approach to tourism development in Albania, to ensure sustainability and to ensure income and employment opportunities; and (5) the need for the adoption and implementation of the "National Cross-cutting Tourism Strategy" (Keshilli i Ministrave, 2016).

- **The General National Territorial Plan 2015 – 2030**: The plan presents tourism as one of its key development priorities and objectives. It integrates the concept of sustainable tourism. The map of the tourist potential within this plan illustrates areas which are classified as 'Areas of National Importance' for the values they have in the planning and sustainable development of the territory (NTPA, 2015a).
- **Integrated Cross-Sectoral Plan for the Coast 2015 – 2030**: The plan provides a development vision for the coastline, adopting a sectorial development approach differentiating areas of tourism, environment, transport, energy, agriculture, and culture (among others) as well as urban development in the territories administered by municipalities. The plan's stated aim is to strike a balance between the need for private investments and the need to develop sustainably, particularly related to tourism in historical and cultural heritage, and protected natural areas (NTPA, 2015b).
- **Cross-Sectoral Strategy for Rural and Agricultural Development 2014-2020**: The document's stated aim is rural tourism development and other activities related to tourism such as cultural tourism, natural tourism, mountain tourism, and summer tourism, among others (Ministry of Agriculture, 2018). The document foresees special support to rural tourism activities, targeting economic development through diversification of economic activities. Some of the strategies for this purpose are the improvement of tourism potential through the development of agritourism and rural tourism, investments in improvement of commercial services, investments in production of traditional products and other economic-financial services, support for incubators for traditional rural products, promotion and marketing of rural areas, improvement of transport services, and development of fairs and local festivals. In addition, a special emphasis is given to the development of social and human capital through the creation of rural networks and local action groups, as well as through the support to the civil society groups in rural areas, vocational training for young people and women, and promotion of cultural heritage, traditions and style of living in the village (Council of Ministers, 2018-1).
- **Cross-Cutting Strategy Digital Agenda of Albania 2015-2020**: This strategy sets out the strategic objectives concerning the digital agenda of Albania, particularly connected to tourism development on two levels. The first is the electronic governance and delivery of interactive public services, including tourism. This implies the development of a national e-Tourism programme and the establishment of a hotel register, tourist resources and products, cultural inheritance, a tourism portal, and coverage of tourist areas with free Wi-Fi service. The second is the development of electronic communications in all sectors, including tourism. This aspect incudes the improvement

of national infrastructure of the information and communication technologies. This will be achieved by the increase of access to a high transmission speed, of at least 100 Mbps in 50% of families, and at least, 30 Mbps for the whole population and the growth of population percentage that uses the Internet from 50 % at the end of 2013 to 90% by the end of 2020. Such developments will enable more access to the interactive public services, including those related to tourism (Ministry of Innovation and Public Administration, 2015).

- **Sectorial Strategy of Transport and Action Plan 2016-2020**: Approved in November 2016, this strategy focuses on the connectivity/accessibility aspect of tourism, aimed at integrated models of combined coastal tourism (sun and sand), cultural tourism (archaeology and cultural heritage), and natural tourism (ecotourism) (Ministry of Infrastructure, 2016).
- **Business Development and Investment Strategy 2014-2020**: The Business and Investment Development Strategy 2014-2020 is the main document for the identification and implementation of the national policies for the promotion of business investments for the period 2014-2020. The strategy is important for the tourism businesses that operate in Albania, over 90% of which are categorized as SMEs. This document has been drafted on the basis of the findings and a detailed analysis of the indicators and identified needs during this period. The Business and Investment Strategy is part of the National Development and Integration Strategy. The Strategy is in line with the principles of the Stabilisation and Association Agreement (SSA) and its chapters, with its 91 articles "Promotion and Investment protection" and article 93" small and medium size enterprises", linked also with principles of the Small Business Act/ SBA. In the frame of the new economic model and in harmony with the SEE 2020 strategy, in 2020 Albania sees itself as a country that has developed and improved the business climate, an open competitive market, development of industrial SMEs and an attractive investment destination and an inclusive and sustainable growth. The strategy is horizontal in nature and does not focus on supporting selected industries and enterprises. It outlines the road map for businesses to develop and improve their competitive skills, develop innovation of products and services, promoting long-term sustainable growth in international markets and creating conditions for attracting foreign investment. One of the main pillars of the strategy is the focus on policies oriented toward business climate and SMEs (Ministry of Economic Development, Trade and Entrepreneurship, 2014).
- **Other Strategies**: Other policies, programmes and strategies that affect the tourism sector are Strategy for Integrated Border Management, Strategy for legal education of the public, as well as other policies and programmes in the field of biodiversity and nature preservation and cultural tourism promotion.

4.1.2 Key Stakeholders

The tourism sector is of interdisciplinary nature. The stakeholders of the sector include Governmental bodies and semi-governmental bodies, Tourism associations, Individual tourism

businesses, NGOs in the field of tourism, and relevant research and educational bodies. Next, a brief analysis of each of the stakeholder groups is given.

4.1.2.1 Government bodies and semi-government bodies

Ministry of Tourism and Environment: The Ministry of Tourism and Environment's mission is the development and implementation of policies that target environmental protection, sustainable use of environmental resources, protection of nature and biodiversity, sustainable management of forests, monitoring of water resources' quality, and development and implementation of tourism policies. The fields of action of the ministry include the tourism sector. The Ministry is responsible for the development of sustainable tourism through:

- Promoting investments in the field of tourism
- Developing and monitoring of the standardization system in the sector and lifelong education of businesses in the tourism field
- Promoting tourist products and destinations
- Coordinating and collaborating with other state institutions and local government units

Other specific functions are delegated to the institutions of dependence.

The National Tourism Agency: The National Tourism Agency activity is based on Law no. 93/2015, "On Tourism", DCM no. 298, dated 20.04.2016 and other legal and sub-legal acts in force. The National Tourism Agency is a public entity with the status of legal public, budgetary entity. It operates as an institution under the Minister responsible for tourism. The National Tourism Agency exercises the following functions and competencies:

- Implements marketing policies in the field of tourism, promoting Albanian tourism at national and international level, to create the image of Albania as a tourist destination in the international market
- Provides information for visitors, travelers and tourists about tourist services offered, tourist products and destinations, activities and other useful data
- Promotes the product and tourist destinations inside and outside the country, cooperating with regional tourism offices, local government and other bodies operating in the field of tourism
- Promotes investments in priority areas for tourism development, cooperating with other public institutions to encourage investment in the country
- Initiates and promotes tourism projects, according to its field of activity, obtaining the prior approval of the ministry responsible for tourism
- Proposes, designs and distributes promotional materials, in accordance with the trends of the tourism market
- Implements the national tourism development strategy and the national marketing strategy for the tourism sector
- Proposes to the Minister responsible for tourism the amendment of laws and bylaws in the field of tourism, arguing the reasons related to these proposals

- Monitors, improves and updates the official website of the Albanian tourism promotion
- Collects the revenues realized from the lease agreements, for the areas given in use for the development of tourism, and makes their disbursement in accordance with the provisions of the legislation in force
- Controls the implementation and fulfillment of the criteria for the existing lease agreements and for the development agreements, related to the "stimulated person" entities

The National Coastal Agency: To achieve a better management and protection of coastal natural resources as well as the promotion of the country as a tourist destination, with the decision of the Council of Ministers no. 31 dt 22.01.2014, the National Coastal Agency was established. It is organized at two levels:

- At the central level, through the central directorate
- At regional level, through four regional agencies

The Agency mission is protecting and developing a sustainable coastal area environment, through monitoring and controlling of the existing potential of the coastal and marine area including environmental assets, as well as controlling of tourist activities throughout the territory of the Republic of Albania for the purpose of sustainable tourism development. The functions and competencies of the Agency include:

- Ensuring performance in coastal areas
- Implementing of integrated management of the coastal area
- Promoting investment in the coastal area
- Coordinating important programmes and development projects for the integrated management of the coastal area
- Ensuring the sustainable development of tourism, through inspection and control of tourism activities

The National Environmental Agency: The National Environment Agency is a central public institution under the Minister, which exercises its jurisdiction throughout the territory of the Republic of Albania, through the central office and regional branches in the regions, which are the Regional Directorates of Environment. The National Environmental Agency is financed from the State Budget and its own resources and has independence in decision-making and performance of its functions, provided by law. Its roles and functions are related to the protection of the environment and natural resources, and approval and monitoring of the activities of private entities, ensuring compliance with environmental protection standards. Its range of activities affects the tourism sector. By setting the rules of environmental responsibility by which every subject that affects the environment must comply, the Agency also controls the activity of tourism businesses which exploit environmental resources, such as tourism businesses located in protected areas and blue economy activities.

National Agency of Protected Areas: The Agency aims at the management, protection, development, expansion and functioning of protected areas, which today constitute about 18% of the territory of Albania. It manages the network of protected areas and other natural

networks such as Natura2000 according to the drafted management plans and monitors and inventories the flora and fauna in these areas. A very important aspect of its activity is the generation of revenues, which in return are used for investments in the same areas. Its activities affect the tourism sector as protected areas are important tourism attractions.

Other government and sub-government bodies: other institutions which directly or indirectly deal with the tourism sector include other ministries, which activities, programmes, policies and strategies affect the tourism sector and other sub-government bodies, such as agencies, inspectorates and special task forces, whose functions affect the field of tourism. In addition, regional branches of the national agencies listed above are part of the local government units in charge for management, monitoring and implementing programmes and activities at local level.

4.1.2.2 Tourism associations

Based on data from the Ministry of Tourism and Environment over 15 tourism associations are established in Albania. The main associations are the **Albanian Tourism Association** and the **Union of Albanian Tour Operators**. The role of these associations is very important in the tourism sector. Their aims and goals include the communication with state institutions, for influencing legislative and policy development in relation to tourism and businesses of this sector, lobbying and protecting the interests of members, organizing trainings and other awareness raising activities to any interested member, and addressing complaints and problems arising from unfair competition.

4.1.2.3 Research and educational bodies

Several research institutions address tourism in their research activities, projects, plans and programmes. Education institutions have contributed to the awareness raising and knowledge development in the field of tourism. There are currently 67 higher education institutions in Albania, of which 17 are public institutions. Among 355 accredited programmes of studies in Albania, ten are in the field of tourism, tourism management, rural tourism, and sustainable tourism (ASKAL, 2021). Usually, tourism curricula are developed within the departments of marketing in each institution. University researchers have produced a significant number of studies in the field of tourism and sustainable tourism.

Besides higher education institutions, many NGOs either in the field of environment or tourism operate in the country and have implemented many research programmes, awareness activities, and other projects and programmes, contributing to the development of the field, and particularly sustainable tourism. 30 NGOs have targeted tourism, environment, and sustainability as their main activity, based on their name and their main theme (the number is observed from the registered NGOs in the Agency for Civil Society).

4.1.2.4 Individual tourism businesses and destinations of particular relevance

The tourism sector is very important in the economy of Albania. A great deal of the business potential of the country and of the services sector is focused on tourism activities. Most of the businesses operating in tourism sector are small or medium enterprises. Very few

accommodation entities have the status of large enterprises. Currently, based on data from the Ministry of Tourism and Environment, the categories of tourism businesses operate in Albania are presented in Table 3.

Table 3: Tourism Businesses in Albania (*MTE, 2019; 2021*)

Business category	**Number of businesses**
Travel Agencies	562
Tour Operators	162
Tourist National Guides	156
Tourist Local Guides	78
Tourist Guides for special activities	69
Tourist Honorary Guides	3
Agro-tourism operators	20
Accommodation Structures[3]	1351[4]/1471[5]
Total capacity of accommodation structures/number of rooms	30504
Total capacity of accommodation structures/ number of beds	69341

An important category within tourism businesses is the Agro-tourism. Agrotourism and rural tourism are activities which have a high development potential for rural areas in Albania. Many villages of Albania have started operating farms that provide services in agrotourism and have achieved very good economic and social achievements in a short time (Thethi, Voskopoja, Dardha etc.). Their efforts in promoting sustainable tourism in Albania have been recognized by the government, which has foreseen a special approach toward business activities in agro-tourism. Within the Cross-Sectoral Strategy for Rural and Agricultural Development 2014-2020, an important emphasis is given to the support of such businesses. The strategy foresees the establishment of the Albanian agrotourism network within the programme of “100 villages”, which will be supported with financial and fiscal instruments. Such support is expected to rise the number of agritourism enterprises in Albania and will contribute to the increase of the employment in rural areas, create a special destination and "brand" of agritourism in Albania, along with other tourist offers, as well as maintain the cultural heritage and traditional values of the Albanian village. The programme will target support for about 27 new agrotourism

[3] The number include the following categories: Hotel, Hostel, Motel, Bed and Breakfast, camping, care centre. Hotels make up 65% of the total. The number should be treated with caution, because a lot of informality in accommodation services exist in the country. In addition, data from different sources are contradictory. In fact, the same figure is declared 2437 in National Strategy for Tourism.

[4] Certified by the MTE (MTE, 2021)

[5] Total businesses that applied for certification (MTE, 2021)

enterprises and 150 inns. The support will also aim at the improvement of farms and livestock stalls for the purposes of agrotourism and rural tourism (Council of Ministers, 2018-1).

4.1.3 Activities and instruments for the development of sustainable tourism

4.1.3.1 Sustainable tourism initiatives, campaigns and projects

Tourism has gained national attention in the government policy, especially in the last decade. Since 2015, many programmes, project and incentives have been developed for stimulating the tourism activity.

The National Program for Urban Renaissance was a nation-wide programme piloted during the 2013-2017 governing mandate aimed at the physical revitalization of main urban centres, implemented in about 70 cities at an estimated cost of approximately 440 million USD. While the main focus of the programme was the improvement of the appearance of the cities, it brought many effects to the enhancement of business sector and touristic visits. Within the new revitalized city centres many small new enterprises have been opened, creating jobs for families. Many have transformed their homes into guesthouses (ATSH, 2021).

The Integrated Program for Rural Development started in 2017. The government shifted its focus to rural development through an exclusive, nation-wide programme dedicated to the development of rural space in 100 villages across Albania. With each of the 61 municipalities represented by at least one village, the programme promises a coordinated approach to rural development by aligning public investments with donor and private investments in villages that have a rich cultural and natural heritage and subsequently high potential for tourism to develop.

Besides the development of particular strategies in support of tourism development, several fiscal and administrative incentives were also introduced, aiming specifically at the growth and attraction of foreign investments in the sector. Ciro (2019) offers a summary of these incentives. Reduction of the value added tax (VAT) for all accommodation structures, from 20% to 6%, was one of the most important incentives. Starting from 2018, the revised VAT level was offered to all services provided in five-star hotels and resorts granted ‘special status’ by the government. In addition, accommodation structures holding the status "four / five-star hotel / resort, special status" and which are holders of an internationally registered trademark "brand name", were exempted from profit tax for a period of 10 years. In the agrotourism area, the law has foreseen financial support for the establishment of agrotourist businesses. A certified entity as ‘agritourist in line with the DCM No. 22, dated January 12, 2018, benefits from VAT reduced to 6% for the services offered in the hospitality sector, namely accommodation and restaurant, and a significantly reduced profit tax from 15% to 5% (ATSH, 2018 and Drejtoria e Pergjithshme e Tatimeve, 2018). Both tax reductions became effective in January 2019.

Two administrative incentives were approved based on the Law No. 55/2015 ‘On Strategic Investments’. The assisted procedure aims at assisting prospective investors by facilitating the process of securing the necessary documentation, following coordinating, assisting, monitoring, and, at times, representing the strategic investment. The procedure also foresees support in the form of enabling infrastructure by making state owned property available to

strategic investment development and implementation (Law No. 55.2015). This procedure is available only to the strategic investors in the tourism sector, investing the equivalent of at least 5 million Euros and generating at least 80 jobs. In addition to all facilitations foreseen under the 'assisted procedure', the special procedure is designed to create all necessary preconditions, including expropriation of private property and approval of contracts by the parliament of Albania (with the consent of the Council of Ministers) to vouch for an increased guarantee of the legal relationship between the investor and the Government of Albania. The eligibility criteria for the exclusive support that comes with the special procedure includes strategic investments valued at 50 million Euros or more with an impact in economy, employment, industry, technology, and regional development (Ciro, 2019).

4.1.3.2 Marketing and information services supporting sustainability in tourism

The use of information technologies in the tourism industry is limited. Except for sporadic cases, usually with the help of international organizations, the provision of digital services to tourists is still underdeveloped (MTE, 2019). Some support means and programmes for implementing Information and Communications Technology (ICT) in tourism are foreseen in the Cross-Cutting Strategy Digital Agenda of Albania 2015-2020. The government has set out some goals of the digitalization of tourism services, especially those related to the transport sector. The first is the electronic governance and delivery of interactive public services, including tourism. This implies the development of a national e-Tourism programme and the establishment of a hotel register, tourist resources and products, cultural inheritance, a tourism portal, and coverage of tourist areas with free Wi-Fi service (Ministry of Innovation and Public Administration, 2015). The second is the development of electronic communications in all sectors including tourism. A third goal affecting tourism is the development of the electronic platform of eTransport, as an operational and financial management system, for intercity road passenger transport. The Ministry of Infrastructure and Energy and the General Directorate of Road Transport Services launched this project, in cooperation with the National Agency for Information Society. It is expected to create a new standard of travel experience with intercity transport lines, based on European best practices. According to statistics, 93% of the total flow of passengers per year use intercity road transport by bus, constituting the largest flow of passengers after air, sea and rail transport. Among the benefits of the e-Transport platform, the possibility of access by foreign travelers and tourists through the web / app and robotic electronic devices for ticketing, lines, timetables, as well as the possibility of interaction with the entire network of other local and regional transport services is pointed out (DPSHTRR, 2021).

4.1.3.3 Sustainable tourism certificates and awards

As pointed out in the National Tourism Strategy 2019-2023, accommodation facilities and other tourism service providers are not classified according to the standards for the services they provide. In addition, there are still no sustainable tourism certificates and awards in Albania. The only certification that is implemented is the agro-tourism certification. For the certification of the providers and the issuance of the certificate "Certified agro-tourism subject", an evaluation commission is set up at the ministry responsible for tourism, consisting

of 5 members, 3 of which are representatives appointed by the minister responsible for tourism and 2 by the minister responsible for agriculture and rural development. Based on the decision-making of the commission, the minister responsible for tourism issues the certificate "Certified agro-tourism entity". The certificate is issued for a period of 5 years. The model of the certificate is approved by a joint order of the Minister responsible for tourism and the Minister responsible for agriculture and rural development. In case of finding a violation of the criteria of this decision by the relevant municipal bodies, the tourism inspectorate, or the competent bodies for inspection of food and hygienic conditions, the commission, based on the request of the bodies finding the violation, may take a decision to suspend and/or revoke the certificate "Certified agro-tourism entity". The provider whose certificate is suspended/revoked, may not use it in its premises or in its trade name. The provider can apply again for obtaining the certificate if the criteria set by this decision are met (Council of Ministers, 2018-2).

The implementation of categorization for accommodation facilities and sustainable tourism certificates are important steps that will guarantee the quality level of the operators and the services provided by them, as well as ensure the regulation of the tourism market by promoting the attraction of international hotel brands and tour operators. Recognizing the limited development in this regard and the complexity of the issue, the MTE has foreseen to implement a standardization methodology in the medium term.

4.1.4 Summary and conclusions

4.1.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Tourism has been recognized as one of the driving forces of Albania's economy - providing jobs and income to thousands of families. Travel and tourism affect all sectors of Albania's economy, stimulating the growth of small and medium-sized enterprises in other sectors – creating more jobs and income along the way. Albania has shown progress in the path toward promoting and developing the tourism sector, as well as sustainable practices within it. However, still the sector is faced with many challenges and the achievement of sustainability seems far along the way. Despite the higher efforts of the last year to monitor and orient tourism development towards sustainability, much damage created during the first two decade after the fall of communism is irreversible.

4.1.4.2 Challenges for the development of sustainable tourism and for SMEs

Compared to other Mediterranean countries, the development of tourism in Albania is still far from the potential represented by the country's natural, historical, and cultural assets. Infrastructure, accommodation capacities, quality of services, the tourism offer, and products are all factors that have inhibited the sustainable and consistent development of tourism in Albania, leaving room for uncontrolled and chaotic development that has kept this industry in operation, but endangering its sustainability in the long run (MTE, 2019). The chaotic process of developing tourism facilities, the disregard of the law, and the high informality of the sector, the conflicting development priorities, and the incomplete and inconsistent data on the

tourism sector hinder the potential of the sector and validation of its progress. Many development priorities go in opposite direction to the sustainable tourism goals. This is the case for example with the small HPP development plans in Albania. Such HPP are projected within protected areas, and their development threatens the biodiversity and environmental values of the areas (REC, 2015).

Despite the vast development in legislation and strategies in the field of sustainable tourism, the level of implementation is very low. In a 2017 report on the effectiveness of policies for the strategic development of tourism, the State Supreme Audit Institution (2017) found that the bylaws for Law No. 93/2015 were slow to follow, which resulted in the failure to establish some key institutions, as foreseen by law. The National Strategy on Tourism lists a number of current and future challenges and does not propose any concrete actions on how to address them. Another issue with the content of the strategy is its focus on international tourism, shadowing the promotion and support of domestic tourism, which represent the most important portion in the sector.

Under these observations, the achievement of sustainable tourism as a development that meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future still has a long way to go in Albania. The four arguments for intra-generational equity in the sustainability debate cited by Bramwell (1998) are very important when discussing sustainability in the tourism sector for Albania. First, it is the local community, especially the disadvantaged social groups, who bear highest costs of the damages of development. Second, poverty encourages unsustainable practices in order to seek quick revenue to meet immediate needs. This issue is evident in Albania, especially in the first decade after the fall of communism. Third, high charges for the use of some scarce resources tend to exclude poorer people. And lastly, it is hard to justify caring about fairness to future generations without extending this concern to people in society today. Under the conditions of a less developed country, any society has the primary responsibility toward providing economic prosperity for its fellow members.

4.1.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The COVID-19 crisis has posed further challenges to the tourism sector. The crisis curtailed global international travel demand and lead to a collapse in tourism industry ahead of the summer season in 2020. The crisis had major impact on the employment rate, especially in particular sectors of the economy. Earlier assessments foresaw a decline in the international tourism industry between 45-70% in 2020 (OECD, 2020). In 2020, the UNWTO predicted that globally international tourist arrivals could fall by as much as 30 percent (WB6CIF, 2020).

In the Western Balkan Region, Montenegro and Albania tourism and transport industries were hit harder than other countries, as the revenues from these sectors exceed 20% of GDP in both economies. In fact, in 2019, Albania was the leading country in the region in terms of the number of tourists arriving and of value of international tourist arrivals (WB6CIF, 2020).

The first confirmed COVID-19 case in Albania was reported on March 9, 2020. Consequently, the government adopted some of the toughest lockdown measures in Europe. The parliament adopted amendments on April 18 to the penal code, legislating harsh punishments for those

breeching the lockdown or quarantine. The state of natural catastrophe, under which more severe measures were in power, lasted until June 23, even though gradual reopening of the economy started since mid-April based on a strategy prepared by the Ministry of Health. On June 1, Albania removed all domestic restrictions to movement and travel and reopened its country borders after virtually shutting them since mid-March. Maritime passenger transport resumed on June 22 and airlines resumed flights on a lighter schedule since mid-June 2020. Most businesses opened, including bars and restaurants with outside seating areas. Public transport was allowed to resume in June. However, the reopening led to a spike in new infections, with the number of active cases and victims rising fast in the second half of 2020. Large gatherings continue to be banned and funerals are restricted to family members.

In June 2020, the Ministry of Health issued a protocol for anti-COVID measures to be followed by touristic businesses (especially accommodation entities) during the touristic season 2020. Albania was one of the destinations that lifted the travel restrictions to continue tourism (UNWTO Sixth report on travel restrictions, 2020), allowing tourists from all countries and nations to enter without restrictions. However, since international travel remained limited, in 2020 the tourism sector benefited mainly by domestic tourists. In 2021, international tourism would start to rise again. Most recent data from the Statistics Institute in Albania show that the number of foreign nationals entering Albania during the first half of 2021 is 1,687,919, increasing by 2.2 times, compared to the same period of 2020 (INSTAT, 2021).

The government has adopted two support packages for people and businesses affected by the COVID-19 pandemic of a combined size of Lek 45 billion (2,8% of GDP) consisting of budget spending, sovereign guarantees and tax deferrals. In particular, small businesses/self-employed that were forced to close activities due to the COVID-19 pandemic were targeted in these packages. The first package adopted on March 19 through a normative act had support measures of Lek 23 billion (1,4% of GDP) through a combination of spending reallocations, spending increases and sovereign guarantees to support affected businesses. The second package adopted on April 15. As of September 3, 2020, more than 94% of the overall budgeted direct support measures had been paid out while the take up for the first guarantee scheme was 59% and for the second scheme 42%. A third smaller support package was adopted on August 13, providing an additional minimum wage to public transport workers who resumed work one month later than the rest. The measure costing Lek 135 million is embedded in the existing transport budget. The government has also adopted tax deferral measures allowing all large companies (except banks, telecommunication, public enterprises and other essential businesses) to defer payment of profit tax for the second and third quarter of 2020 in 2021. Tourism, active processing, and call centres can defer payments for the rest of 2020 to 2021. Small businesses with turnover below Lek 14m will not pay profit tax for the rest of 2021 (WB6CIF, 2020).

In summary, the COVID crisis halted the progressive rise of the tourism sector, and compromised the ability of tourism activities, most of which are small and medium enterprises, to further progress. Many tourism activities shrank or closed during 2020-2021, and government support has been insufficient to make them withstand the crisis. According to the Albanian Tourism Union, around 5 million overnight stays during the summer season 2020

were cancelled and 1 in 5 trips were cancelled across the region (OECD, 2020). In July 2020, the number of foreign tourists was found to have decreased by 61.5% compared to the previous year (OECD, 2021). In a baseline scenario reported by the WB6CIF (2020), Albania would experience a 20–35 percent fall in tourism receipts for 2020. In the second quarter of 2020, Albania had an economic contraction of 10.2%, followed by a contraction of 3.5% year-over-year in the third quarter. Trade, transport and hospitality services, important branches of Albania's economy, greatly contributed to the recession with a 27% decrease. Tourism, which accounts for more than 20% of Albania's GDP, was consequently one of the most affected sectors by the pandemic.

The COVID-19 pandemic is expected to change the way people travel as well as the tourists' expectations, with a shift from mass tourism to a more individual, tailored experience. Many recommendations have been given to achieve the recovery of tourism sector in the future. Table 3 shows some of these recommendations summarized by WB6CIF (2020) in its report on the Prospects for Travelling and Tourism Sector in the Western Balkans in 2020 (impact of the coronavirus pandemic). The report considers developing sustainable tourism for Western Balkans countries as a key to the post COVID-19 recovery.

Table 4: Policy priorities recommended for the tourism sector (*OECD, 2020; WB6CIF, 2020*)

TOURISM	
	Establish efficient cooperation mechanism between the government, private sector and civil society
	A whole-of-government approach that harnesses synergies across relevant sectors, such as transportation and health, is more important than ever to set strategies to support industry recovery. The current situation also underlines the need to collect timely data in order to inform decision-making and better plan for the type and scale of the immediate impact of the current crisis and the tourism recovery planning.
	Promote the domestic demand for tourism
	In the short-term, the region's economies can foster domestic tourism through the provision of incentives for citizens to spend their holidays in their own economies, such tourism vouchers.
	Emphasise health and safety measures to regain the tourists' trust
	This could include the development of health and safety guidelines for tourism companies, especially for accommodation facilities and restaurants. Guidelines should be also accompanied with targeted training options to advise service providers on how to ensure the health and safety of the visitors in their facilities.
	Introduce targeted marketing campaigns promoting ecotourism
	Given the current health and safety requirements induced by the current pandemic, a shift away from mass tourism can be expected in the short to medium-term. Therefore, the tourism agencies across the region can promote alternative travel destinations, allowing for experiences for individuals/ small groups.
	Reconsider their current tourism policies and define tourism products aligned with new trends
	The region's economies need to diversify their offer and disperse further tourism development to new destinations while emphasising the principles of sustainable tourism development. The region has high potential (natural and cultural heritage) for tourism development, from mass tourism with overcrowded destinations to green and sustainable destinations, offering unique tourism experiences.

4.1.4.4 Recommendations for boosting Sustainable Tourism for SMEs

As Cater (1993) identifies, three key objectives for sustainable tourism that should be incorporated in the process of strategy development are: meeting the needs of the host population in terms of improved living standards both in the short and long term, satisfying the demands of a growing number of tourists and safeguarding the natural environment in order to achieve both of the preceding aims. Farrell (1999) highlights the 'sustainability trinity' which

aims at the smooth and transparent integration of economy, society and environment. In order to achieve such integration, several efforts are needed. Taking into account these objectives, some recommendations for achieving sustainable tourism development in Albania are given next:

Development of strategies in cooperation between sector: Sectorial strategies are inadequate to capturing all the dimensions for achieving sustainable tourism development. Collaboration between institutions of different profiles is essential in drafting and implementing a strategy for tourism. Inter-sectorial cooperation and policy development has higher potential of capturing and achieving sustainability goals.

Create more incentives for development of sustainable tourism sectors: Ecotourism, alternative tourism, responsible tourism, soft tourism, low-impact tourism, community tourism, and so on, are dimensions of tourism whose potential should be assessed and promoted in Albania. Promoting these practices of tourism has also the advantage of creating a better image of the country, as ecotourism practices attract tourists. Many practices and incentives given by the government have primary focus on mass tourism, rather than sustainable tourism (VAT reduction, tax exemption). Therefore, fiscal incentives should be extended to the promotion of softer forms of tourism. Ecotourism practices can be used in addition as a marketing tool or tactic to give businesses a competition advantage. Finally, long term sustainability goals should include both the development of small-scale tourism and the development of sustainable conventional mass tourism and supplement it with all sorts of alternative forms of tourism where and when appropriate. To repair the damage caused by earlier tourism initiatives is an ultimate challenge in this regard.

Develop comprehensive tourism products: Tourism requires three levels of resources: the attractions for tourists, including natural, cultural and purpose-built, the infrastructure and superstructure, to support tourist activities, and the physical and social settings, including the hospitality of the community (Liu, 2003). Albania has lagged behind in building tourist infrastructure such as modern congress centres, amusement and recreation parks, golf courses, marinas etc., without which it is difficult to attract certain segments of tourist demand and to enable year-round tourism expansion. Albania also lacks the centres for mountain and adventure tourism development, entertainment diving centres, bike paths, etc., which will position Albania in the special interest of the tourism market. In the first years after the fall of communism, the main driver of international tourism was curiosity about the country. Such feeling has persisted in tourism community over the years and also was advertised as a reason to visit the country. The untouched nature, the authentic culture, and the diversity of the touristic sites were the main topics of many commercials on tourism in Albania. However, nowadays tourists are becoming more experienced, more critical, more quality conscious and seek new experiences as well as 'good value for money'. Furthermore, tourist destinations across the world are facing increasing competition from other leisure industries and other destinations as well as constantly changing tourist tastes and behaviors. Therefore, the revision of tourism products is a necessity. It is not anymore sufficient to offer just a beautiful coastal site. Additional tourism products such as tours, cruises and rides should support core tourism activities. A strong stakeholder collaboration is crucial in this regard. In particular, tour

operators, travel agents and national tourism organizations are essential entities in developing and promoting sustainable tourism products and touristic destinations.

Enhance a pro-active involvement of tourism stakeholders: Sustainable tourism development requires simultaneously meeting the needs of the tourists, the tourist businesses, the host community and the needs for environmental protection. The effective planning and implementation of collaboration and partnerships among various stakeholders in the process of tourism development is thus required. There is no data on the degree of involvement of stakeholders in the process of strategic development of the sector. Besides stakeholders identified previously in the report, local communities should be invited and serve as the most active promoters of tourism and implementers of tourism programmes. In less developed countries in particular, the local community strives to benefit from tourism development, but are often faced with the inability to participate in the development process (Liu, 2003). A greater level of local involvement in the planning and development of tourism is an essential prerequisite of sustainable tourism. Another reason why the local community should be involved in the policy development process is that it is part of the "tourism product". The locals are those who interact with tourists and their attitudes and behavior constitute the "hospitality resource" of a destination (Smith, 1994). The more the local residents gain from tourism, the more they will be motivated to protect the area's natural and cultural heritage and support tourism activities. By integrating and reconciling these needs and concerns, an improved quality of life can be achieved for the community, while tourists gain satisfactory experiences, the tourism industry makes a fair profit, and the environment is protected for continuous future use (Liu, 2003).

Introducing the concept of demand management: Demand management refers to finding enough tourists to fill capacities. It is often deemed more critical than resource management since tourist demand usually fluctuates more frequently than tourist resources (Liu, 2003). Demand management is important in sustaining tourism resources so that effective marketing can channel tourist demand to places that are more impact-resilient, such as urban and seaside-built environments rather than to more fragile wilderness areas. Visitor management techniques can also be applied to select or deselect tourists, control their flows and influence their behaviour through promotion and education. Such a concept is not integrated in policy development in Albania. However, working upon it, can make tourism strategies more tangible and practical.

Identify and assess the carrying capacity of the sector: The weakest components (the bottleneck) of the industry defines the maximum potential tourism capacity of a destination. Infrastructure and amenities determine the actual or effective tourism carrying capacity while agency and administration normally set the level of the realized capacity in a given period of time. As addressed previously, supporting Infrastructure for tourism activities is very problematic in Albania. However, the carrying capacity include much more aspects: physical, ecological, psychological, social and economic (Liu, 2003). Each of these carrying capacities has different thresholds and different implications for tourism development. Physical carrying capacity refers to the maximum number of tourists that a site or destination can physically accommodate, based on the minimum space a tourist needs, say a couple of square metres on

a crowded beach. Ecological carrying capacity is related to the impacts of tourism on the natural environment and the long-term viability of the natural resources. Psychological carrying capacity is concerned with the perception and satisfaction of tourists, which varies across different types of tourists, holiday forms and destinations. Social carrying capacity involves the sociocultural impacts of tourism that will influence the attitude of the local community towards tourism. Economic carrying capacity has strong connections with the profitability and opportunity costs of tourism development. Therefore, the careful assessment of the carrying capacity under the challenges of achieving sustainable tourism development is essential. As Pasko (2016) also outlines, the calculation of carrying capacity should be done once the development model of a tourist destination is defined. A more specific approach adapted to the principal characteristics of the environment and types of tourism that could develop successfully is needed, in order to address the problems of sensitive coastal ecosystems, specific environmental climate, great wealth of cultural heritage, specific tradition or behaviour of the local population.

Awareness raising among business sectors: Incentives, activities, programmes, and campaigns for awareness raising and educational purposes are extremely important in order to implement any of the strategies and above listed recommendations for the achievement of sustainable tourism. It is through education and knowledge that the interconnection between tourism, the environment and economic development can be captured and actions toward the achievement of sustainable tourism goals can be embraced by businesses, local communities, and government units.

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4.2 Austria

Ulrike Pröbstl-Haider, Alice Wanner, Melanie Feilhammer and Barbara Diallo-Strobl (As of June 2021)

4.2.1 Political framework for Sustainable Tourism

4.2.1.1 National Sustainable Tourism Policies and Strategies

Since Austria is a Federal Republic, the nine independent Federal Provinces have the legislative and executive competencies for tourism affairs. The national level policy is the responsibility of the Federal Ministry of Agriculture, Regions and Tourism but each province has its own tourism strategy and tourism organization.

Sustainability in all its facets is the overarching guiding principle for tourism in Austria. In this regard, it strongly aims to contribute to the implementation of the Agenda 2030 and achievement of the Sustainable Development Goals (SDGs) of the United Nations.

In March 2019, the Austrian Government presented the *Plan T*, a masterplan for tourism on a national level. This masterplan was elaborated in a participatory process with stakeholders from the tourism branch to define suitable measures for the industry concerning a sustainable development. The *Plan T* defines three guiding objectives with three fields of action each, which can be seen as the strategical framework (BMNT, 2019a). One of the key aspects of the plan is working towards greater levels of sustainability, including improving climate-friendly mobility and promoting further use of renewable energy. One field of action (number 6) for example aims to ensure sustainable livelihoods and includes the fields of action 'Positioning Austria as a "green" destination, turning tourism into a "power plant", and creating structures for sustainable mobility and improving connectivity'.

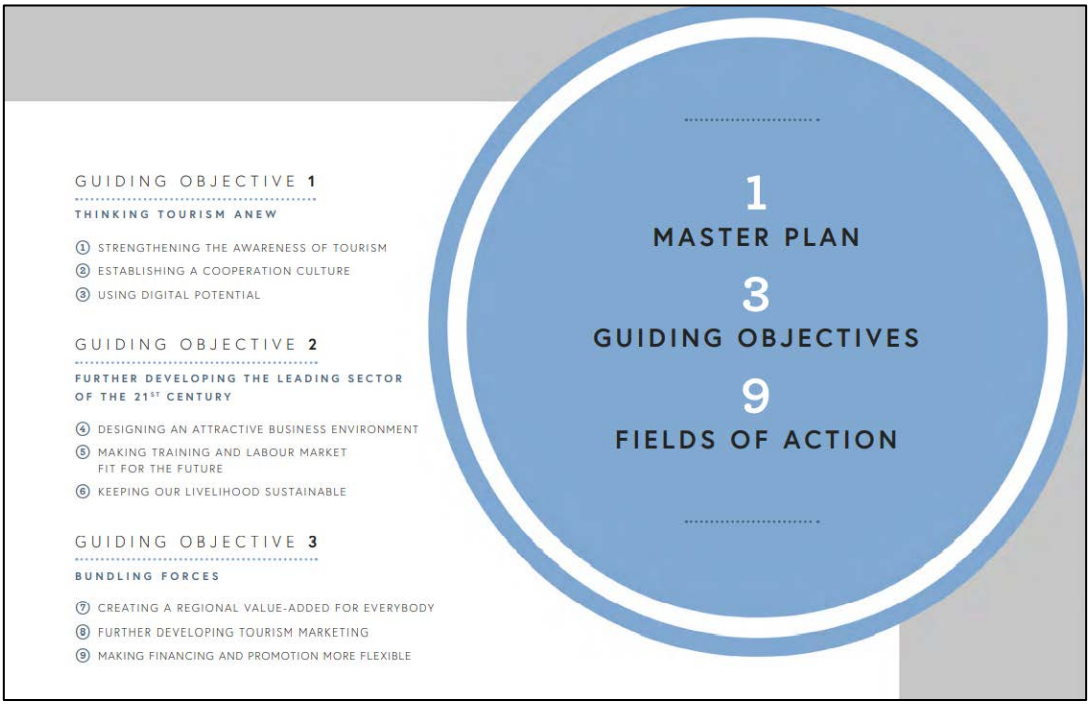

Figure 3: Structure of the Plan T (*BMNT 2019a*)

In addition, the *Action plan 2019/2020* was published as the first annual action plan, which includes 28 measures in bullet points covering the main fields advertising, digital potentials, funding and support mechanisms, rental via platforms, Austria as culinary-destination, action plan for safe alpine pastures (concerning legal security), tourism as a driver for energy transition, initiatives for the job market and new quality of the tourism policy (BMNT, 2019b).

Due to COVID19 the ministry presented a "Comeback-Plan" for Austria's tourism at the beginning of July 2021, to address the steps in order to stay on track for the *Plan T* under these changed circumstances (see also chapter 4.2.4.3).

4.2.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

Policies and strategies for sustainable tourism are also defined on regional level by the respective provinces but also by the local destination management organizations (DMOs). Therefore, it is difficult to give a complete picture here. Hence, we focus on one example only and highlight further regional strategies.

Each province has its own concept and sustainable offers are always included. The following figure shows the concept of Styria which includes besides the discussion on sustainability also threats by over-tourism. In addition, new target groups interested in sustainable tourism are presented. The strategic publications also highlight new energetic solutions, green mobility, the role of certification and regional cooperation.

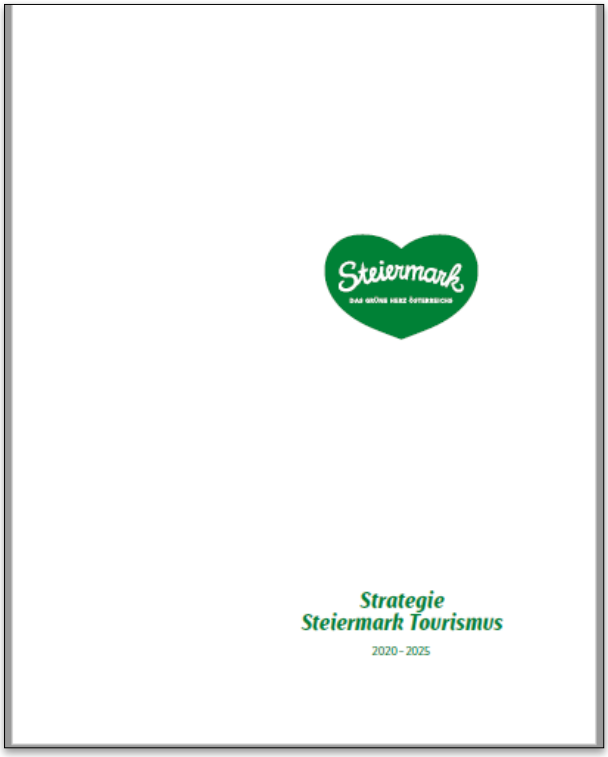

Figure 4: Example for a regional concept (Steiermark Strategiehandbuch)

In addition, various regions provide, often together with hotels and other units, tailored offers (see: https://nachhaltigertourismus.at/) combining regional information and local offers.

4.2.2 Key Stakeholders

Key sustainable tourism stakeholders are found at national, state and regional level. Tourism developments, especially in regard to sustainability are mainly situated at regional level. The most relevant and central stakeholders for sustainable tourism are briefly summarized below.

4.2.2.1 Governmental and semi-governmental bodies

At the centre of governmental stakeholders is the **Federal Ministry of Agriculture, Regions and Tourism** (*Bundesministerium für Landwirtschaft, Regionen und Tourismus - BMLRT*). The ministry's competencies include international tourism issues, coordination of regional politics and spatial planning, innovation, and regional cooperation in regard to tourism development. Furthermore, it functions as a centre for legal advice and supplies funding and grants for tourism development. BMLRT also develops national level tourism policy in Austria. The **Austrian Bank for Tourism Development** (*Österreichische Hotel und Tourismusbank - ÖHT*) supports sustainable tourism through a variety of financial and funding support for the tourism industry. **Statistics Austria** (*Statistik Austria*) collects statistics on tourism and includes sustainability indicators. Figure 4 shows the further organizational structure. Stakeholders on the national level are presented with a red frame.

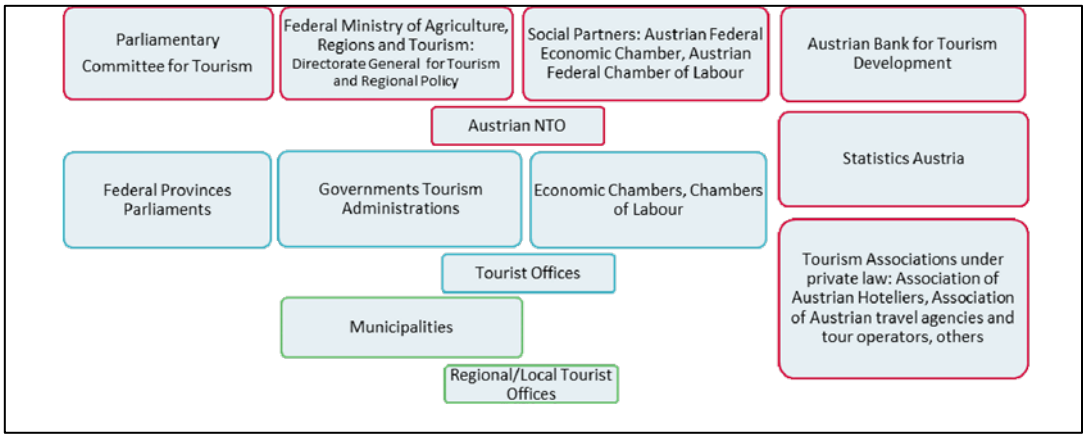

Figure 5: Organizational structure of tourism in Austria (*BMLRT 2021; https://info.bmlrt.gv.at/en/topics/tourism/tourism-governance/organisational-structure.html*)

4.2.2.2 Tourism Associations

Tourism associations in Austria exist at national, state and regional level. These associations include the **Austrian National Tourist Office** (*Österreich Werbung*) at national level along with nine state level tourism associations. State level institutions are very relevant stakeholders who often develop cooperations with relevant institutions in the mobility sector for example Tirol Werbung working with the **Austrian National Rail** (*Österreichische Bundesbahn - ÖBB*) to develop improved public transportation connections. However, it is local and regional associations who are the strongest driving forces in sustainable tourism, as the responsibility for implementation of sustainable strategies lies with them.

Aside from regional associations there are two noteworthy representative associations: the **Austrian Hotelier Association** (*Österreichische Hoteliervereinigung - ÖHV*) which represents

leading resort, corporate and city hotels, and the **Austrian Travel Association** (*Österreichischer ReiseVerband - ÖRV*) which represents predominantly travel agencies and tour operators.

4.2.2.3 NGOs, Sustainable Tourism Networks and Partnerships

The most well-known stakeholders amongst the NGOs in Austria are the **Austrian Alpine Association** (*Österreichischer Alpenverein*) and **Nature Friends** (*Naturfreunde*) with corresponding national and state level chapters throughout the country. Lesser known but also active is the **Austrian Tourism Club** (*Österreichischer Tourismusklub - ÖTK*). All three of these organizations work closely with their members to ensure safe alpine and outdoor activities while also including elements of nature conservation.

In addition to these, the **Transport Club Austria** (*Verkehrsklub Österreich - VCÖ* -) centres its work on efficient, socially equitable and sustainable transportation systems in Austria, develops studies and factsheets and bestows the *VCÖ Mobility Award* to outstanding projects. While their work includes all aspects of transportation, travel and tourism activities are often featured in their work. **Cycling Lobby Austria** (*Radlobby Österreich*) represents concerns and interest of cyclists and has instituted a specific cycling tourism segment focussing on developing and improving the quality of routes and infrastructure for cyclists. Additionally, they cooperate with public transportation providers to ensure multi-modal travel opportunities.

The networks **Alpine Pearls** and **Mountaineer Villages** (*Bergsteigerdörfer*) have both dedicated themselves to topics of sustainable mobility and focus on car-free travel and activities. While both feature destinations predominantly in Austria, the networks also include some destinations from neighbouring countries. The hotel networks **Nature Idylle** (*Naturidyll*) and ***Organic hotels*** (*Bio hotels*) are networks that go beyond a certification, as they are dedicated to a level of connection amongst themselves to ensure knowledge transfer between them. Thus, ensuring sustainability is upheld throughout the network. The ***Hiking Villages*** (*Wanderdörfer*) network focusses on hiking in destinations which seek to maintain ecological and social integrity while simultaneously upholding a typical local character of the destination. Here too, exchange and learning from each other is a characteristic of the network.

Various partnerships further shape the Austrian sustainable tourism stakeholder landscape and play a vital role in sustainable tourism. One such partnership is **Indulgence regions** (*Genussregionen*) which partners local agricultural production with gastronomy and hotels to provide guests high quality culinary experiences which reflect local traditions and culture, thus providing increased sustainability in the product chain. Also common are partnerships between national parks and the surrounding communities for improved destination management and marketing. Examples of such partnerships include **National Park Limestone Alps** (*Nationalpark Kalkalpen*) or **Steyr National Park Region**.

4.2.2.4 Relevant research and educational bodies

Research on certification and sustainable tourism development has mainly been covered by the MODUL University Vienna and by the University of natural resources and life sciences (BOKU) Vienna. BOKU developed specific guidelines for cable car enterprises and the

management of ski resorts based on the *Eco-Management and Audit Scheme* (*EMAS*) (Pröbstl et al 2004, Pröbstl-Haider et al. 2018). Further research focused on the motivation of hotels to get certified, the different content of labels, the motivation for shifting from one label to another and the environmental effects achieved by certified hotels over time (Müller, 2011; Müller and Pröbstl, 2012; Reschl, 2019). A regular update of EMAS registered tourism facilities, related information and support is also provided by the Austrian Environmental Agency (Umweltbundesamt, DI Monika Brom, Stv. Teamleitung, Nachhaltige Entwicklung, Bundesministerium Klimaschutz, Umwelt, Energie, Mobilität, Innovation und Technologie [BMK], Dr. Regina Preslmair, Abteilung V/7, Betrieblicher Umweltschutz und Technologie).

Additional information for guests and interested entrepreneurs is provided by the Ministry on Climate, Energy, Mobility, Innovation and Technology, and can be found under the this link.

4.2.2.5 Individual tourism businesses and destinations of particular relevance

The Austrian tourism presents and highlights several regions and destinations in the context of sustainable tourism development (see ANTO 2020).

Alpbachtal: A local planning bylaw from 1953 makes Alpbachtal's traditional wooden architectural style mandatory for all new buildings, preserving both its heritage and alpine look. This has even led to Alpbachtal being voted 'Austria's most beautiful village'. There are also some 105 working farms in the Alpbach valley, about the same number as 100 years ago – a true 'living history' in these parts.

Gmünd: This once medieval centre in the province of Carinthia is now a unique artistic hub and a fine example of a small town revitalised, assuming renewed identity and cultural relevance. To date, Gmünd, has refurbished some 15 buildings that had long stood empty and now host a collection of galleries, workshops, art studios and special exhibition spaces. Nicknamed 'the artists' town of Gmünd', it is a testament to Austria's dedication to a continuing, self-nurturing arts culture appreciated by locals and tourists alike.

Graz: Austria's second largest city, is a real hotspot for all things culinary, including a number of festivals celebrating its gastronomy, a definite 'to-do' is a visit to one of Graz' many farmers markets that dot the city. 350 farmers from the immediate vicinity guarantee fresh, organic products with very little mileage attached.

Hohe Tauern National Park: The largest protected area in the Alps which is spanning some 1856 km^2 of untouched nature across the three provinces of Salzburger Land, Tirol and Carinthia. The numbers are impressive - 266 peaks over 3,000m, 551 lakes, 279 streams and rivers, and 250 glaciers. A third of all plant species native to Austria grow here.

Innsbruck: The capital of the Tirol is popular for its enviable location which offers the draw of a pedestrian-friendly city with plenty of character lying near incredible mountain recreation. There are over 140 drinking fountains around Innsbruck. Many are real eye-catchers and could be considered art installations in their own right, at least one dates back to 1806. All water is fresh, crystal-clear mountain spring water, rich in minerals, and originating directly from the

nearby Karwendel Nature Reserve. No need for plastic throwaway containers here. Simply reuse, refill and recharge with a taste of Innsbruck.

Kitzbühel: Internationally recognised and synonymous with world-class ski, Kitzbühel has a healthy respect for what makes it such an all-season recreational draw for visitors. Care for its environs has led to its commitment to the 'We Respect Nature' project whereby visible, orange signage denotes areas that are off limits to people whether on a summer hike or exploring off piste in winter. This ensures that local wildlife is not disturbed or displaced, and their habitat is protected and untouched.

St. Johann in Salzburg: This town has long prioritised the conservation of resources and the use of renewable energy. In 2008, it received the highest honour of the e5 programme – a Europe-wide qualification and award programme for municipalities. A free ski bus runs in winter and e-bike rental in the warmer months are just some of the eco-friendly possibilities here.

Other publications highlight engagement in the context of the sustainable development goals, which are in line with sustainable tourism development, which are a special national goal by the Ministry of Agriculture, Tourism and regions (BMLRT, n.d.). The initiative addresses different target groups from the hotel manager, the entrepreneur but also includes student studies.

The **Hotel Retter** in Styria is a pioneer when it comes to climate neutrality in the accommodation sector. Energy efficiency is of high importance for building measures as well as for heating, cooling and also mobility. Agricultural production is part of the hotel, with fruit orchards surrounding the buildings that are eco-certified since 1992 and an eco-certified gastronomy since 2004. The extraordinary effort for sustainability and quality of service had the result of 263 points in an audit of the Green Globe, when 61 points were required for the Austrian eco-label (exceeding the requirements with 267%) (Hotel Retter, 2021).

The **Boutiquehotel Stadthalle** in Vienna also shows extraordinary effort targeting a sustainable offer. Guests who arrive via bike, train or e-car get a 10% discount on the price of their room for example. The building itself is the first zero-energy balance hotel in Europe. The offer further consists of an organic breakfast and a lavender roof garden. The hotel is also available for hosting green meetings (Boutiquehotel Stadthalle, 2021).

The **Castle Thannegg** is an Eco-hotel in Styria with special interest in energy efficiency, alternative energy sources and research on effects of environmentally friendly action on family hotels. As the first hotel in the world, Castle Thannegg counts the CO_2 emissions of guests arriving at their own CO_2 footprint (Schlosshotel Thannegg, n.d.).

Another business worth mentioning is '*der daberer*' which is a biological certified hotel since 1978 (**Biohotel Daberer** GmbH, n.d.) as well as the **Naturhotel Waldklause** which was built in an innovative glue-free solid wood construction and with Tyrolean sheep wool insulation (Naturhotel Waldklause, n.d.). Also, the **Hotel Heffterhof** in Salzburg (City) is a great example for sustainable accommodation and hosting green meetings and events, certified with the Eco Label (Hotel Heffterhof, 2021).

On a regional scale several **online platforms** offer information and lists for sustainable and Eco-certified accommodation and gastronomy in the respective area. See for example:

- **Bio Urlaub Steiermark**
- **Ramsauer Bioniere**
- **Bioparadies Salzburgerland**
- And many others

Others, like **Slowfood Carinthia** (*Slowfood Kärnten*) focus on the sustainable production of food. **Werfenweng** offers sustainable tourism with a special focus on soft/sustainable mobility. With the **SAMO-Card** guests can rent E-Vehicles (from E-Cars to fun vehicles) for a fee of only €10 per person if they choose a Samo accommodation and have traveled by public transport. Other services like a Shuttle to the local train stations and further activities like guided hikes, entry to the leisure park Wengsee or snowshoeing in winter and many more are included. Also, some provinces, like Lower Austria or Carinthia, offer special information and deals for vacations by bike and larger bike tours.

4.2.3 Activities and instruments for the development of sustainable tourism

4.2.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

At national level **klimaaktiv** is an initiative of the Federal Ministry of Climate Action, Environment, Energy, Mobility, Innovation and Technology (*Bundesministerium für Klimaschutz, Umwelt, Energie, Mobilität, Innovation und Technologie - BMK*). The main goal is to decrease greenhouse gas emissions through increasing the market share of climate-friendly technologies and services at high and assured quality. One of the activity fields of *klimaaktiv* is mobility management for the recreation and tourism segment. Here *klimaaktiv* offers advice for different actors in the field (destinations, tourism businesses, tourism organisations but also event planners, protected area managers etc.) and supports them in applying for funding in the field of sustainable mobility (klimaaktiv, 2021 a).

KEM Tourism is strongly oriented towards the successful Climate and Energy Model Regions (*Klima- und Energie-Modellregionen - KEM*) programme. KEM supports regions in making optimal use of their local renewable energy resources, in exploiting the potential for energy saving and in sustainable management. The commissioning of an implementation concept and its implementation by the model region managers are the cornerstones of the programme. The aim of KEM Tourism is to establish the region both nationally and internationally as a model region for climate friendly tourism and thus to encourage the efforts of other actors (Tourismuspresse, 2019). At the moment, there are two KEM Tourism regions in the implementation phase for measures: the region Nassefeld-Pressegger See – Lesachtal – Weissensee in Carinthia and the region Zell am See – Kaprun in Salzburg (Klima- und Energiefonds, 2021 a).

Also the **KLAR!-region programme**, focusing on climate change adaption, supports projects and measures for sustainable tourism. 18 measures for alternative tourism concepts are implemented at the moment. The main goal of the programme is to prepare regions and

municipalities for climate change, to minimise the negative consequences and even utilize eventual chances (Klima- und Energiefonds, 2021 b).

In summer 2020 the Austrian National Tourist Office and the ÖBB (*Austrian Railways*) started the campaign to **rediscover Austria,** a campaign for sustainable domestic tourism. Within this campaign the ÖBB offered special conditions, benefits and tourism packages for "Vorteilscard" holders (APA-OTS; 2020). The **benefit card** (*Vorteilscard*) offers discount up to 50% off the regular ticket price when travelling with the ÖBB and private railways, that are included. A yearly fee of € 66 or €99 has to be paid, but there are special offers for families (€ 19), senior citizens (€29) and everyone under the age of 26 years (€19) (ÖBB-Personenverkehr AG, 2020).

4.2.3.2 Marketing and information services supporting sustainability in tourism

Klimaaktiv, which was already mentioned in the section above, organises conferences and information events like the *Tourism – Mobility – Day* and publishes guidelines, checklists and information brochures in cooperation with the BMK and the Federal Ministry for Agriculture, Regions and Tourism (*Bundesministerium für Landwirtschaft, Regionen und Tourismus - BMNT*) (klimaaktiv, 2021 a).

One of these is the **Online-Guideline for Energy management in the hotel and gastronomy industry**, which can help businesses to get on a sustainable track. The guiding starts with a self-check to determine the status quo. Based on the outcome there are measures for energy saving and renovation listed. Also, options for funding and certification are presented. Additionally, actors can get an overview of Good-Practice-Examples for inspiration and motivation (klimaaktiv, 2021 b).

Another guideline for sustainable tourism focusing on mobility with the title 'How does my tourism destination become sustainably mobile?' ('*Wie wird meine Tourismusdestination nachhaltig mobil*?') presents destinations and operators opportunities to make their offer more sustainable. Measures as well as contact persons and funding sources are displayed (klimaaktiv, 2021 c).

In 2019, the ÖHV started the initiative **'Send a signal** ('*Zeichen setzten'*) focusing on avoiding waste and plastics as well as saving energy in hotels. In 2021, two years after the implementation, the result shows a positive outcome: Three guidelines were published (energy management in the hotel industry (Link see above), waste avoidance and E- charging stations, 106 businesses made use of the offers for energy saving in the gastronomy and kitchen and many more measures were implemented (ÖHV, 2021).

The Austrian National Tourist Office published a **position paper** (sustainability in tourism: in 2012 as a basis for discussions on sustainability in tourism. It outlines the requirements as well as visions for the tourism sector) (ANTO, 2012).

4.2.3.3 Tourism Sustainability Certification Systems and Awards

Certification systems are also perceived as crucial tools to enhance the sustainable development of hotels and tourism enterprises (Müller and Pröbstl, 2012; Honey, 2002; Bien, 2007; Font, 2002). The trend toward environmental or sustainable certification has increased

in the last two decades. By now a large number of voluntary standards have emerged and many companies adopted them (see Bendell & Font, 2004; World Tourism Organization [WTO], 2002) using these various certifying programmes and their sustainability standards (Font, 2002). This overall trend is also true for the situation in Austria where about 60 different certifications can be found with a national, regional or international background (Müller and Pröbstl, 2012). However, this applies not for all types of businesses in tourism in the same way. Overall hotels are more interested than e.g. cable car enterprises or other providers of tourism services.

All certifications have three crucial functions: environmental standard setting, third party certification of these standards and value-added marketing or environmental communication (Müller and Pröbstl 2012). In addition to various voluntary approaches the International Organization for Standardization has developed more generic environmental certifications that do not apply to one industry in particular (e.g. ISO 14001 and ISO14004). In Europe also the Eco-Management and Audit Scheme (EMAS) serves as an environmental benchmark and plays an important role in various branches (Pröbstl-Haider et al., 2018; Pröbstl and Jiricka, 2009).

The instrument of certification is also used by governmental initiatives to improve sustainable development. The Austrian Ministry of Environment developed a certification to enhance the sustainable development in various sectors with a strong focus also on tourism (Lebensministerium, 2005). Later, in the course of the 2015 UN General Assembly, the international community, including Austria, committed itself to implementing the 2030 Agenda on a regional, national and international level. Following this commitment to the 2030 Agenda, the first official step in Austria followed in January 2016 by a resolution by the Council of Ministers, according to which all federal ministries were given the mandate to implement it in a coherent manner. Accordingly, the SDGs are to be integrated as a central element of the 2030 Agenda by the ministries in their respective areas of responsibility (Smutny, 2017).

The labeling of products and services by means of a quality label primarily serves as proof of conformity for compliance with defined requirements and for the aggregated presentation of relevant product or service-related information. Certain standards exist as ‘state of the art’ for the creation of these requirements and for the certification process itself. At the European level, the ISO 14020 - 14025 standards for environmental labels and declarations of the 14000 series of environmental standards of the International Organization for Standardization (ISO) are of central importance. In its ISO 14020 series of standards, the ISO differentiates between three types of environmental labels and declarations as one of the tools in environmental management and thus defines ‘Guiding principles for the development and use of environmental labels and declarations’ (ÖN, 2002: 3). While type I environmental labels are based on certification by external, independent third parties, an *Environmental supplier declaration* (type II environmental label) is by definition an "environmental statement without certification by independent third parties from manufacturers, importers, wholesalers, retailers or all of them others who might benefit from such a statement” (ÖN, 2016: 9).

All types are based in principle on a voluntary basis. Certification by independent third parties is only mandatory for type I markings.

This series of standards also deals with the increasing number of labels which are mainly created for marketing purposes. From a governmental perspective the increase in environmental statements has created the need to develop standards for environmental labels that cover all aspects of the product life cycle that are significant for the environment (ÖN, 2016: 6).

In addition, the ISO 14000 series of standards includes further certification options for companies in the context of the development of environmental management systems. The central standard for this is ISO 14001. In addition, the EMAS environmental management system offers another option for company certification according to specified standards (Pröbstl-Haider et al., 2018).

However, in tourism the number of labels in Austria is increasing (Müller and Pröbstl, 2012). Müller and Pröbstl (2012) highlight that some of the new generated labels (such as BIO-Hotel, Sleep Green or Nature-idyll-Hotels) are not seeking to be dominant in the international market because they positioned their label to a specific regional target group, and in some cases a limited number of members may be an advantage rather than a disadvantage. A good example for this strategy is the label "Nature-idyll Hotel" from Austria. Their members want to position their hotels to clients by committing to environmental management in general, as well as to a specific attractive nature-oriented ambience.

Comparing the various labels applied in Austria one can see that the presentation on the website differs between the labels significantly, and not all sites provide complete information. Therefore, to the tourist, differences between the labels are hardly visible. Müller and Pröbstl (2012) also report differences concerning the controlling. The "Österreichische Umweltzeichen" (Austrian Ecolabel) belongs to the labels, which are intensively controlled. The authors summarize the challenges for tourists in the alpine area as follows:

- **Regional representation**: Some Labels such as the *Bio-Hotels* or the *Austrian Ecolabel* (*Österreichische Umweltzeichen*) are only present in Austria. Tourists from outside Austria may not know the respective background.
- **Substantial methodological differences and levels:** The systematic within the evaluation methodology varies significantly between the respective labels. Some labels define basic criteria and benchmarks which have to be fulfilled by the hotel.
- **Marketing concept and main target groups:** A typical example for a target-oriented certification is the Austrian Group of *BIO-Hotels*. The whole list of criteria is dominated by the concept to attract tourists supporting the concept of organic living (organic food, beverages, cosmetics etc.). The "Nature-Idyll-Hotels" clearly state that they want to attract the so called LOHAS (Lifestyles of Health and Sustainability) clients as their main target group. They do not accept hotel chains as members. These kinds of certificates differ from those open for all type of hotels and each of them is characterized by a different definition or understanding of sustainability. However, some of these labels use the Austrian Ecolabel as a basic requirement for their certification.

Environmental labels (e.g. Austrian Ecolabel, EU Ecolabel) of high standards generally include the entire life cycle. Only in this way can eco-labels serve as a comprehensive instrument in the decision-making process since the influence of products and services on the environment naturally requires a comprehensive approach. “Eco-labels are intended to provide the consumer with bundled information about environmentally friendly products and processes […]” (SRU, 2008: 64).

Since comprehensive certification procedures are associated with a certain amount of time and money, companies are also forced to label their products and services with self-created and not externally verified labels. However, there is often a lack of a holistic view of all environmentally relevant aspects and the information is distorted, as individual positive effects are highlighted by the labeling, negative aspects are not dealt with and thus hidden (Rennings et al., 2008: 93). One result of this development is the now unmanageable number of different labels with all the associated negative effects. There are more than 60 certificates in tourism in the Alpine region (Müller, 2011).

The ‘Österreichische Umweltzeichen’ (***The Austrian Eco-label***)

The Austrian Ecolabel was founded as an association brand in 1990 on the initiative of the Ministry of the Environment. It is based on the graphic design of the artist Friedensreich Hundertwasser and combines the components earth, water, air and nature in its symbolism.

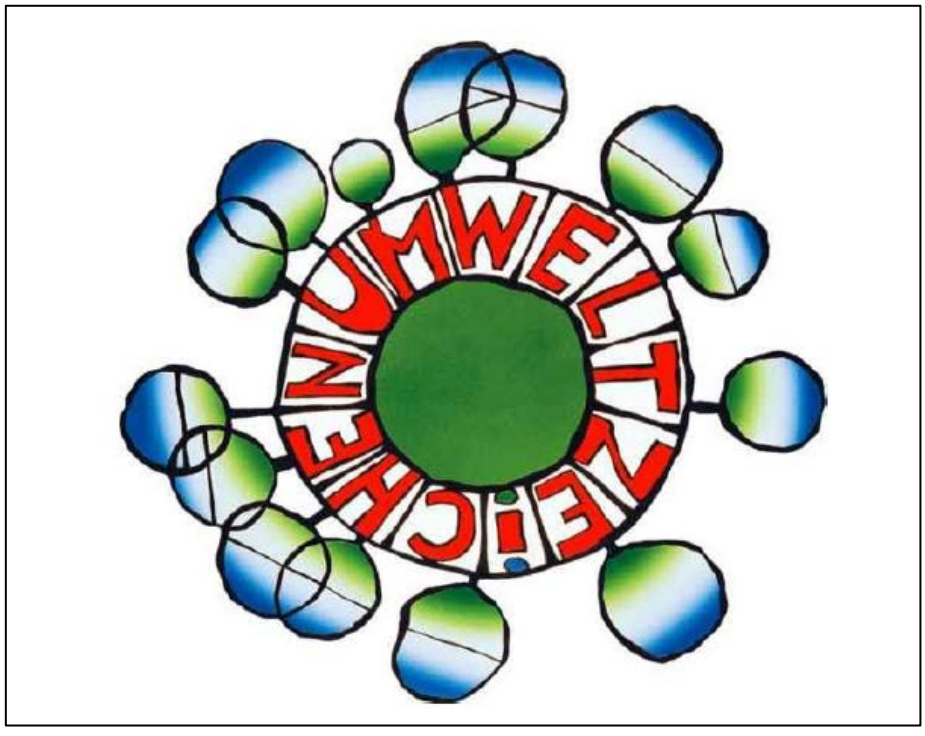

Figure 6: The Austrian Eco-label, designed by Hundertwasser

As an environmental labeling programme of ISO type 1, the Austrian eco-label serves as an independent state seal of approval for the award of environmentally friendly consumer goods and services with an assessment of the entire life cycle. Environmentally friendly in this

context means "more environmentally friendly than the current range of products serving the same purpose" (BMLFUW, 2007). In addition to the comprehensive consideration of relevant environmental aspects, qualitative characteristics with regard to usability, safety, durability and ease of repair are also checked. The primary goal is to influence the demand behavior of the respective consumer-relevant target groups through bundled environmental information in order to give preference to more environmentally friendly products and services. In addition, the eco-label is also intended to encourage manufacturers and retailers to develop more environmentally friendly offers in order to subsequently achieve continuous market-driven environmental effects. As part of a continuous development since its foundation, products and services are currently being awarded in the four overarching categories of products, tourism, education and green meetings & events.

The assessment of a tourism business for fulfillment of the criteria required for the award of the eco-label is carried out within the framework of an independent external appraisal, which is commissioned by the business with a qualified inspection agency and provides for a holistic assessment of the business. An on-site inspection of the operation by an independent testing agency is required to verify that the criteria have been met.

This is allocated to the respective company after receipt of the application can be selected by the company itself from an accredited pool of examiners. Some requirements can be verified by self-declaration and/or the conformity is determined in the context of the on-site inspection. To speed up the process, numerous details can also be entered via a dedicated software portal. The examination time in the company depends on the size of the company and typically requires several hours up to one day. As part of the test, the entire company is inspected. After the end of the test, the company receives a preliminary test result and information about any documents that may still be submitted. The final release of the company for the use of the eco-label takes place after the assessment of the test report of the eco-label test by the *Austrian Consumers' Association* (*Verein für Konsumenteninformation - VKI*) a non-profit organization to represent interests of consumers, strengthen their position and to inform about rights and obligations). In addition to the compulsory selection of a suitable test centre, the certification process also offers the opportunity to consult trained advisors in order to support the company in implementing the measures to obtain the eco-label. A consultant can be called in by the company in advance of the examination, but this is not mandatory. It must be taken into account that the company is not checked by the same person who provides the advice. Consulting services can be a considerable relief for a company in the sense of an efficient and effective implementation of the certification and are funded by chambers of commerce or economic development institutes as well as state governments, depending on the federal state. In addition, a look from the outside often provides important information on how to improve operational processes and suggestions for improvements and savings in environmentally relevant areas. The effort for an external consultation is usually based on the requirements and wishes or on the preliminary and internal work performed by the company. After completion, the entire report sent to the Ministry of the Environment for the issuing of the license agreement and the award certificate. The characters are awarded for a period of four years. Operating costs result from the expert opinion as well as the offsetting

of an application fee (one-off) depending on the size of the establishment and an annual license fee.

The application fee to be paid for an application for the first award of the Austrian Ecolabel also includes the costs for the initial assessment. The annual license fees are used to support the licensees and to finance marketing activities. In addition, the annual license fee is used to cover the costs of a follow-up test.

The database on tourism related certificates based on EMAS showed that only a few enterprises use this certification in Austria (see table 5 in chapter 4.2.4.1).

One ski resort on Austria uses the certification and auditing following EMAS and ISO 14001. In this context the resort in Lech am Arlberg (ISO 14001) and the Schmitten Höhebahn in Zell am See (EMAS and ISO 14001) are good examples and front runners within the branch.

Eco-label - guidelines for tourism businesses

According to the guideline of the Austrian Ecolabel for Tourism and Leisure Industry, accommodation providers, restaurants, conference and event locations, campsites and shelters can be recognized for their commitment to environmentally friendly management and social responsibility. The prerequisite for the award and use of the Austrian Ecolabel is compliance with all relevant laws and regulations of the federal government, the respective federal state and the responsible municipality. The requirements of the guideline to be met are divided into must and should criteria, with the former representing indispensable minimum requirements in the following areas:

- Management and communication
- Energy / water / waste
- Air / noise
- Office / printing
- Cleaning / chemistry / hygiene
- Buildings / construction and living / furnishing
- Groceries / kitchen
- Transport / mobility
- Outside / open spaces

In addition to the required criteria, optional measures (target criteria) must be implemented. Either measures from an example catalog or environmentally relevant personal initiatives can be implemented. A point-based system is used to take into account the target criteria in the various areas. The list of mandatory criteria ensures the comparability. The most extensive possible harmonization with the requirements of the EU Ecolabel at European level should make it easier for companies to obtain the Austrian Ecolabel and the EU Ecolabel within one test procedure (BMLFUW, 2007).

Ecolabelling for green meetings in Austria

Tourism development in Austria mainly in cities such as Vienna, Salzburg and Innsbruck is also significantly linked to conferences and events (Ranacher, 2013; Fritz et al., 2021). Within the

field of green meetings there are two ecolabels that were created in Austria. Ökoprofit was created in 1991 by the Environmental Agency Graz and is a regional label dedicated to sustainability in the meetings industry in Graz, Styria. On a national level there is the **Austrian Ecolabel for Green Meetings and Events**, which is an adapted version of the Austrian Ecolabel for Tourism, see figure 6. The 'Ecolabel Guideline 62 Green Meetings and Green Events' pursues to inform and raise awareness and covers four categories of events, such as congress/meetings, company meetings, trade fairs/exhibitions, seminars, and other events that fulfil the requirements set by the authority (BMLFUW, 2014, 5ff).



Figure 7: The Austrian Ecolabel for Green Meetings (*BMLFUW, 2013*)

The criteria of the governmental run ecolabel are available online and listed in table 5 together with the maximum number of points possible. They are divided into basic requirements, which the licensee has to fulfil in any case and in event specific criteria, of which some can be selected freely. A minimum number of points must be reached, which depend on the scope and size. The evaluation criteria consist of

- Mobility and CO_2 offsetting,
- Accommodation,
- Event venue,
- Procurement, material and waste management,
- Exhibitors/Exhibition stand builders,
- Catering,
- Communication and social aspects (BMLFUW, 2014).

The facility hosting the event has to be a licensee for the Austrian Ecolabel to be able to award the ecolabel for green meetings. The facility, which applies for being a licensee is accountable for the compliance with the criteria, the documentation and the licensing of the events (BMLFUW, 2014).

4.2.3.4 Capacity Building for Sustainable Tourism

Selected courses on sustainability, tourism planning and sustainability are provided within all tourism education opportunities from the university level to the many famous tourism schools in Austria (see Modul University, see University of natural resources and life sciences, Vienna). However, in Salzburg a full programme is offered on sustainable tourism topics.

Capacity building in this context is also provided in the context of the SDGs (see the website by the Ministry of Agriculture tourism and regions and by the agency of environment) (Umweltbundesamt) and the certification agency, when it comes to certification and consulting. Educational offers are also provided by the climate regions and by the related climate fund Austria (Salak, 2016).

In the context of capacity building, it is of high importance to understand the motivation and interest in sustainable tourism. A discussion with hotel managers and their motivation (Müller and Pröbstl 2012) reveals that for the credibility it is important whether it is a governmental certificate or a private one. For some hotel managers the certification by the state has a higher credibility and good visibility for the client. The funding, however, is of little relevance. For the interviewed hotel managers, the credibility is also a part of their personal goals and visions. For an owner and operator of a “Bio-Hotel” the credibility is of high value, because he or she strongly beliefs in this way of living. For this group their personal credibility and the credibility of the label coincide. This leads to high demands toward the certificate and the controlling process. The Austrian example and the interviews with Austrian hotel managers also showed that the high hopes to improve the sustainability by certification are still valid since Müller and Pröbstl (2012) found within certified hotels more satisfied clients, reduced impacts on the environment, an improved market positioning and even positive effects on the motivation of the personnel. Reschl (2019) found that mainly the first certification is of high environmental efficiency compared to the results in the following years. These research findings are important when developing capacity building tools. Instead of highlighting financial savings motivational aspects should be presented and addressed.

4.2.3.5 Financial Support for SMEs in regard to sustainable tourism activities

The Ministry for Agriculture, Regions and Tourism is responsible for the strategic use of budget funds to support activities in the tourism and leisure industry. In addition to federal budget funds, financial resources from the ERP and EU co-financing funds are utilized.

Tourism funding by the Ministry of Agriculture, Regions and Tourism is serving different purposes. One part of the tourism budget is dedicated to funding programmes for tourism SMEs administered by the Austrian Bank for Tourism Development. The main objective of these programmes is to encourage investments, innovation and young entrepreneurs by means of grants, loans, interest subsidies and guarantees. The Corona crisis has shown that sustainable projects and offers are more stress-resistant and less crisis-prone and have further developed Tourism 2020. One of the current funding calls therefore promotes Sustainability and resilience in tourism.

The objective of this funding action is therefore to make the local tourism offer - both for summer and winter - fit for the whole year with a view to the new requirements and guest needs, to jointly develop or expand it in a sustainable way and - wherever possible - to create synergies in order to achieve regional resilience.

In addition to the national budget, all nine Federal Provinces have their own tourism budgets to support specific tourism development programmes.

The Environmental Funding Programme in Austria (*Umweltförderung im Inland - UFI*) is the central promotion of the federal government. Funding is provided for measures that have positive environmental effects (especially CO_2 reductions and energy savings). These include the use of renewable energy sources, increased energy efficiency, mobility measures, but also projects to avoid and reduce air pollutants, noise or hazardous waste.

In addition to the federal environmental subsidies, there are supplementary measures in many federal provinces that support businesses on their way to increasing energy efficiency or converting to renewable energy, either consulting or with investment cost subsidies.

The Austrian Energy Agency offers a funding guide which provides a comprehensive overview of funding for energy efficiency and renewable energies in Austria.

4.2.4 Summary and conclusion on national situation

4.2.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Certification is perceived as a crucial strategy to enhance sustainable and climate friendly development in tourism. The main tourism plan (Plan T) significantly counts on the entrepreneurial initiative. Interested entrepreneurs or event managers are supported with tools and guidelines.

Table 5: Certified enterprises in tourism using EMAS (*data base Austrian environmental agency, Brom, 2021*)

	AT-000515	12.01.2007	St. Virgil Salzburg
	AT-000648	26.06.2014	ZOTTER Schokolade GmbH
	AT-000652	11.07.2014	DIE GARTEN TULLN GmbH
	AT-000661	28.05.2015	Schmittenhöhebahn AG

Recent research also focused on possible benefits and outcomes, covering both biodiversity and the use of resources and other environmental issues. Positive effects are reported for cable car enterprises and ski resorts as well as for hotels.

In ski resorts, the application of EMAS and the related change of the summer management enhanced the biodiversity of plants, insects, and birds on slopes. However, as table 4 shows the number of certified organizations is still limited.

In the dynamic field of environmental policy, sustainability certifications are increasingly confronted with the question of their benefits. The results by Reschl (2019) have shown that in the context of the implementation of the Austrian Ecolabel some significant environmental improvements were achieved in the analyzed hotels. In addition, the results illustrate the potential for improvement of tourist accommodations. The monitoring data (Reschl, 2019) could serve as a basis for further analysis on the efficiency of the Austrian Ecolabel and can be used to identify relevant data to be collected in the certification process, to define a set of meaningful environmental performance indicators, to identify difficulties and potential for improvement of data collection and evaluation and finally to derive recommendations for

further analysis and enable regular data analysis as well as to create guidelines for companies based on benchmarks.

The environmental agency provides only data on the Austrian environmental sign as well as certification by ISO and EMAS. The efficiency of other cooperations is unknown. A study by Müller (2011) however shows that these environmental signs differ significantly concerning the relevant criteria, the certification costs, the membership fees, the assessment, the transparency in the web and reporting duties.

4.2.4.2 Challenges for the development of sustainable tourism and for SMEs

In Austria in tourism, there is a common understanding that strategies must be tailored to the respective levels such as national level, the destination level or the local entrepreneurial level (Pröbstl-Haider et al., 2020). A special attention should also be given to the role of the guest and the communication strategy. Finally recent publications highlight the relevance of a set of general steering instruments (Mostegl, 2020; Pröbstl-Haider et al., 2020) which should be used in combination such as legal and normative instruments, economic instruments, instruments based on behavioral economics, planning instruments and finally facilitation and moderation.

At the national level, various steering measures are discussed. In this context, it is highlighted that the economic system, in which tourism is integrated, is brought to an overall sustainable and climate-friendly course. Examples include an ecological tax reform with the medium-term goal of a full internalization of external costs as well as a national funding policy that financially supports the transition to sustainable, climate-friendly development and makes it economically easier for companies or regions to transition (Mundt, 2011).

However, in contrast to the scientific suggestions highlighting the high relevance of soft instruments based on behavioral economics, planning and facilitation, the political discussion focusses mainly on legal or economic instruments. It is a challenge to change this perception and to show the efficiency of other steering instruments.

Since the development to sustainable tourism also requires a contribution by the guests, there is an agreement that awareness-raising measures must be taken to positively influence tourists in their vacation planning to achieve more sustainable behavior. The current poor availability of information e.g. on the carbon footprint of products and services in tourism means that even environmentally conscious tourists are hardly able to make an informed consumer decision (Pröbstl-Haider et al. 2020). More transparency regarding the greenhouse gas emissions of products and services is needed in order to create a fair basis for the internalization of external costs, and to enable climate-conscious consumers to make an informed decision. In consequence the main information platforms for travelers, such as travel agencies, travel providers and booking platforms (e.g. Booking.com or Trivago) must be significantly improved. This can be achieved, for example, by showing the CO_2 footprint of respective offers, as well as by presenting specific certifications.

In addition, the environmental performance of various providers (e.g. cable car companies) should be better presented on the respective website in order to be used in the decision-making process (Schmied, 2012). Often environmental engagement or certificates are difficult

to find. However, international literature also highlights that information alone is not sufficient to achieve sustainable or climate friendly decision making and behavior. (e.g. Stehr & von Storch, 1995; Becken & Simmons, 2008; Hunter & Shaw, 2006; Sharpley, 2006). In this context one must consider that strict measure to enhance sustainability may affect the overall desired experience by the guest. Therefore, it is perceived as a major challenge for research to understand guests' decision making. The recognition of appropriate system relationships, trade-offs and dynamics is the prerequisite for being able to develop further strategies and adaptation concepts (Pröbstl-Haider et al., 2020).

The relevant literature also shows a significant shift in the methods used to study consumer behavior. Current research therefore suggests concentrating on new concepts that combine research results from psychology, economics and consumer behavior research in order to achieve behavioral changes (Hardeman et al., 2002; Webb et al., 2010; Pröbstl-Haider & Haider, 2013; Pröbstl-Haider et al., 2020). Current research concepts therefore aim to think of alternative concepts going beyond restrictions, environmental information or calls of appeal, and to test and implement them. These approaches include the nudge theory (Thaler & Sunstein, 2009). Nudging in this context is also perceived as a logical development of a changing governance landscape (Baldwin et al., 2011; Levi-Faur, 2011; Bradbury et al., 2013; Kosters & van der Heijdenc, 2015). Appropriate research approaches combining theory and practice are still pending in Austria. It is also unclear whether the promotion of certificates can nudge tourists in the future.

In addition to the above-mentioned changes in the individual behavior of the tourist, there are numerous options for reducing greenhouse gas emissions on the business level, e.g. by changing the systems or operational processes, and generally adapting good business practices. In the past, the main focus was on the supply side, including the improvement of buildings and services through the implementation of renewable energy infrastructure, energy-efficient systems and insulation (BMWFW; WKO & ÖHV, 2015) and the support of individual companies through advice, certification and funding (Pröbstl & Müller, 2012; APCC, 2014; EIW, 2014). In continuing this tradition, the climate fitness of projects to be funded will have to be taken into account. Also, subsidies may have to be restricted accordingly. All efforts to promote certification of companies should also continue to be supported. In the energy sector in particular, considerable savings potential has been demonstrated in the past (Reschl, 2019). However, incentives should make the decision for a detailed certification easier. In this context, many companies in Austria would like to see a facilitated process for the approval of adaptation measures (Pröbstl-Haider et al., 2018).

Bonadonna et al. (2017) report an increasing attractiveness of climate friendly and sustainable tourism products especially for the group of so-called millennials (people who were born between 1980 and 1995) because the topic of sustainability already has a higher priority for this segment.

According to the legal definitions, tourism development and innovation in Austria is clearly a task of the regional tourism associations. Accordingly, the regional tourism associations, as destination managers, should be interested in an increasing number of certified SMEs.

However, in this context we see little cooperation or awareness rising by the regional destination management.

Accompanying measures at the national and European level are absolutely necessary to enhance sustainable tourism offers in Austria in addition to the measures at the destination level. This is particularly true for the mobility and transportation sector, where appropriate taxation and the provision of public transport can create essential conditions for adaptation on the one hand and new product development on the other. The personal trade-off of the travelers will essentially depend on the development of this offer.

4.2.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

While China reported the first case in December 2019, it took almost three months for the global spread of COVID-19 to reach Austria (Kantis et al., 2020). On February 25, 2020, the first two people in Tyrol tested positive for the virus. The first case in Vienna was due to a Viennese lawyer who had been in the hospital for 10 days with flu symptoms at the time of the test. After the 72-year-old man's positive test result, all visitors and 90 hospital employees were quarantined (Die Presse, 2020). By March 5, the situation in Austria seemed to be largely under control, there were only 24 reported infections, most of which can be traced back to stays in neighboring - and already severely affected - Italy (Trescher et al., 2020).

After March 5, there was a rapid spread, for which the well-known winter tourist resort Ischgl is named as the epicentre, after an employee of an après-ski bar infected several guests of different origins with SARS-CoV2, which the virus then returned to their home countries imported (Trescher et al., 2020). After numerous cases in northern Germany, Denmark, Norway and Iceland became known 10 days later, which could be traced back to the ski resort of Ischgl, Ischgl and the surrounding Paznaun Valley were quarantined (Tiroler Tageszeitung, 2020). Due to the increasing number of new infections throughout Austria, nationwide restrictions in the form of a so-called “lockdown” were decided with the aim of curbing the spread of the virus.
After record arrivals in February 2020, a subsequent drop in April, with a difference of 99.7% compared to 2019. The easing of the situation in some main markets such as Germany, the Netherlands and Italy in the course of the summer of 2020 was also evident in the international arrivals. The difference between May and June is particularly significant; In May 2020, only just under 37,000, but in the following month of June, almost 700,000 - mainly German - guests were recorded. Overall, it is noticeable that the rapid decline in arrivals contrasted with a very rapid increase. Despite rising COVID-19 diseases in Austria in July and August, international arrivals in August rose to 65% of the 2019 value, and total arrivals to over 80% of the 2019 value.

Since in 2021 the hotels were closed again, the government developed “State aid packages for tourism companies” in Austria:

During the COVID-19 crisis, targeted measures were taken "to provide security in the ongoing pandemic on the one hand and to support companies in this challenging time on the other." (Safe hospitality; WKO, 2020: 1). From July 1, 2020, an Austria-wide corona test programme for tourism was introduced. This programme made it possible for all accommodation providers to

have their employees tested regularly and at the expense of the federal government (Safe Hospitality; WKO, 2020: 1). In addition, the Austrian federal government offered tourism companies various aid packages that affected companies can access and the purpose of which was to cushion the negative economic consequences that many tourism companies had to suffer:

Short-time work

Short-time work is the "temporary reduction in normal working hours and wages due to economic difficulties" (Corona-Infopoint, WKO, 2020). If an employee was sent on short-time work, the employer only had to pay the hours that were actually worked - the difference to the original salary was largely paid out to the employee by the Public Employment Service if all the necessary requirements were met (Corona Infopoint; WKO, 2020: 1). Working hours were reduced in the short-time working model by a maximum of 70% and at least 20% of the previous working hours. In order to apply for short-time working as an employer, an economic justification was required, which was to be provided by the "Information on the development of sales or other meaningful indicators" (Ibid.). The gross remuneration of the last fully paid month before the application was used as the assessment basis for the remuneration paid during short-time working. The application for the short-time working model was possible for all companies that were affected by COVID-19-related measures.

Fixed cost subsidy

Companies that suffered sales losses of at least 40% due to the COVID-19 crisis between May 16, 2020 and September 15, 2020 were given the opportunity to apply for the so-called fixed cost subsidy. This financial reimbursement for rents, insurance premiums, interest expenses, license fees, electricity / gas / telecommunication costs as well as personnel expenses due to the crisis was available to all companies that had their headquarters or their permanent establishment in Austria or carried out an operational activity "for income from agriculture and forestry, self-employed work or business operations" (Fixkostenzuschuss.at, 2020). Furthermore, companies that applied for the fixed cost subsidy were obliged to "have taken reasonable measures to reduce the fixed costs to be covered by the fixed cost subsidy" (Ibid.) before submitting the application. The application could be submitted to the COVID-19 Federal Financing Agency (COFAG), which carried out the application reviews and finally decided on the eligibility of the companies (Fixkostenzuschuss.at, 2020).

Loan deferrals

The effects that the COVID-19 crisis has on the Austrian labour market can be seen, among other things, in the fact that many people have problems repaying current loans due to their income being reduced by job loss or short-time working. If the borrower "has a lower income or a financial bottleneck due to the COVID-19 pandemic" (Corona-Infopoint, WKO, 2020: 1), it is possible to apply for a free deferral - that is, an extension of the loan period, which the borrower does not causes additional costs. This applies to loans that were taken out before March 15, 2020 and is supported by the Austrian banks - as an application, it is sufficient to contact the bank and explain the reasons for the postponement in more detail (Corona-Infopoint; WKO, 2020: 1).

Investment premiums

In order to promote operational investments - which fell sharply during the COVID-19 crisis – an application for an investment premium could be made. This was an additional payment for "tangible and intangible new investments requiring capitalization" (WKO, 2020). The premium was at least 7% and could be increased to 14% (WKO, 2020) for investments in the areas of "digitization, greening or health / lifestyle".

New initiative for the comeback of tourism

Austria supports the overall strategy by the European Union. In addition, the responsible Ministry started a recovery strategy, which is built on the future-oriented Plan T.

Together with the industry, a wide variety of institutions and experts, it is now to be discussed which course must be set in order to be able to pursue the vision of Plan T under the changed conditions after COVID 19 and to overcome the crisis as quickly as possible. A 5-step process should lead to suitable solutions.



Figure 8: Concept for the recovery of the Austrian tourism branch – "Let's go! – to the comeback of local tourism (*BMLRT, 2021*)

The concept consists of 5 steps and related workshops with the following themes (BMLRT, 2021; info.bmlrt.gv.at):

- May 05, 2021: Tourism - focus on employees
- May 12, 2021: Tourism in the regions
- May 17, 2021: Future travel habits
- May 31, 2021: New financing prospects for tourism
- July 7, 2021: The final workshop will summarize the conclusion and present the overall "Comeback Plan"

The governmental measures were overall quite effective. However, the tourism branch lost many employees during the pandemic situation. In 2020, the summer season with a significant number of inland guests saved the many hotels in Austria especially on the countryside. Conference hotels, city hotels and pure winter tourism destinations depending mainly on international arrivals were more suffering. It is expected that in 2021 the incoming guests mainly from Germany, The Netherlands and Switzerland will lead to sufficient income to maintain the business. In a survey for lower Austria conference hotel managers stated that they needed their financial reserves to survive the pandemic (Mathera, 2021). The efficacy of the recovery strategy is unknown since it has started recently.

4.2.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Sustainable Tourism for SME requires the presence of several supporting factors besides an overall national strategy. Some of the main aspects are listed below:

- National and regional support, promotion and related funding programmes
- Tailored training opportunities which go beyond a fact-based teaching but also addressing motivational aspects
- Regional and local support to find an adequate certification tool, combining marketing issues and sustainable development
- Exchange platforms for SMEs to discuss their special need with their colleagues

4.2.5 References

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4.3 Bulgaria

Elka Dogramadjieva, Mariana Assenov, Gueorgui Stoev and Radenka Mitova
(As of August 2021)

4.3.1 Political framework for Sustainable Tourism

4.3.1.1 National Sustainable Tourism Policies and Strategies

Most relevant strategies and legislation

At the national level tourism is governed by the Minister of Tourism but the state policy in the field of tourism is defined by the Council of Ministers. Currently the major priorities of the activities of the Bulgarian Ministry of Tourism (an independent ministry since 2014) are the inter-state relations in the field of tourism, the regulatory provision for tourism activities, tourism product development, assisting the activities of the regional, local, and professional tourism organizations, national marketing and promotion, market research, analyses, and forecasts for the tourism market.

One of the aims of the special act, regulating the tourist activities in Bulgaria – the **Tourism Act** (2013), is to provide conditions for sustainable development of tourism (including the national resorts) and a competitive national tourism product, although there is no specification of the dimensions of the various aspects of sustainability. The first Tourism Act in Bulgaria was developed and enforced in 1998. Since 2001 many amendments have been made to reflect the dynamic changes on the market and the increased quality requirements of tourists and in 2013 a new Tourism Act was adopted. Thus, new sections were introduced to incorporate the EU directives (package tours and OTAs), but also aiming to establish an integrated tourism information system, to launch classification of tourist attractions (beaches, ski runs, spa centres) and certification of professions (tour and mountain guides, ski instructors), as well as to extend the scope of the municipal programmes for tourism development and the functions of mayors. The provisions of the Tourism Act also define the tourist regions (9 DMOs established in the period 2017-2019) as marketing tourist regions. One of their specified activities is to support the development, introduction and implementation of voluntary systems for assessing the quality of tourist services and the sustainable development of the tourist region.

In 2006, as a result of a PHARE project (originally created in 1989 as the Poland and Hungary: Assistance for Restructuring their Economies (PHARE) pre-accession EU programme) for technical support to the State Agency for Tourism (now Ministry of Tourism), a strategic plan of the agency for the elaboration of a tourism development strategy was prepared. The first National Strategy for **Sustainable Development of Tourism in Bulgaria (2009-2013)** was approved by the Council of Ministers in 2009. The main objective of the strategy was to enhance the competitiveness of the sector through effective use and preservation of resources in compliance with the principles of sustainable development. The strategic aims included ensuring a higher profile of Bulgaria as a tourism destination on the global tourism market, improving the infrastructure at national, regional, and municipal level, the implementation of

international standards and best European practices, product innovations and human resources development, as well as preservation, protection and quality improvement of tourism resources. In 2009 the Council of Ministers also adopted a **Strategic Plan for Cultural Tourism Development**. According to its concept the historical, cultural, and natural assets were considered as a complex local identity of a certain territory, named "LoCuS" (local cultural system), and the plan identified 13 local cultural systems with specific product specialization and development plans.

The current **Strategy for Sustainable Development of Tourism in Bulgaria** (Ministry of Tourism, 2018a) covers the period 2014-2030. The overall objective of this strategy is the sustainable development of Bulgarian tourism, which defines the strategic aims in 4 priorities: 1) creating a favourable general and business environment for the development of sustainable tourism; 2) development of a competitive tourist sector; 3) successful positioning of Bulgaria at the world tourist market; 4) balanced development of the tourist regions. In the recent pandemic situation, there is a call for reworking of the strategy to reflect the change in the objectives and to refocus the activities for the recovery of the sector. Thus, in May 2021 the Ministry of Tourism published a document containing analysis and proposals for long-term development of tourism to help the elaboration of a strategy for tourism development until 2040 and outlining specific priorities and measures that may be embedded in a long-term strategy for tourism development (Ministry of Tourism, 2021a).

The strategy also appoints that according to evaluation reports of the European Commission and the World Bank, Bulgaria is at the beginning of the process of sustainable development with inefficient resource management and low level of environmental innovation, high air pollution, deficits in terms of conservation and biodiversity and underdeveloped capacity to adapt to climate change. Climate change is recognized as a serious problem that will deepen in the coming years as Bulgaria is among the most vulnerable countries to climate change in the EU and tourism is among the three sectors in the country that will be mostly affected. For that reason, tourism is one of the sectors considered in the **National Climate Change Adaptation Strategy and Action Plan** (Ministry of Environment and Water, 2019), adopted in 2019, in which sectoral climate change policy for tourism, developed by the Ministry of Tourism, in cooperation with other relevant ministries and government organizations as well as with the private sector, is recommended.

From a territorial perspective, in 2020 a substantial reform was introduced in strategic planning of regional development. Regional and spatial development will be integrated and will cover the development and updating of a system of documents to reduce the imbalance in the development of the national territory, taking into account the territorial potential and ensuring the development of cross-border, transnational and interregional cooperation (Regional Development Act, 2008). One of the basic documents, the **National concept for spatial development for the period 2013-2025** (National Concept, 2020) intends to convert the monocentric model into the desired model of moderate polycentrism, which has not yet been fully achieved. The document considers tourism in the aspect of its territorial development and not as a narrow sectoral planning, but as an element of integrated spatial planning. Tourism development requires rethinking of the exploitation of resources and

counteraction is needed against the established seasonality and uniformity of the tourist product, the quality of the environment and the transformation of the recreational landscapes into urban ones. In addition to the natural components, tourism development must recognize and support the identity, culture, and interests of local communities. Of special importance for ensuring the protection of natural landscapes and cultural heritage and sustainable integrated development of the Black Sea coast is the **Act on the Black sea coast spatial development** (2008).

National programmes and plans for the period 2021 - 2030

During the preparation of the **National Development Programme "Bulgaria 2030"** special attention was paid to the United Nations (UN) 2030 Agenda for Sustainable Development: Transforming our world and the 17 global goals for sustainable development, which are considered as a framework for national development policies, and the National Development Programme itself is the government's response to their implementation. In the National Development Programme "Bulgaria 2030" culture, heritage and tourism at first glance are considered in symbiosis, as they are jointly established as one of the 13 identified priorities (P13. Culture, heritage, tourism). The priority falls in the development axis "Spirited and Vital Bulgaria", which corresponds to the following Sustainable Development Goals - 3 (Good health and well-being), 8 (Decent work and economic growth), 11 (Sustainable cities and communities) and 12 (Responsible consumption and production). However, the approach to the elements of this symbiosis is fragmented and does not presuppose a direct connection between them. No interrelation is established between the three sub-priorities: 1) cultural diversity and access to culture; 2) cultural heritage and 3) tourism and tourist regions. The culture and tourism sectors are treated independently, with no convergence attempt and guidelines for mutually beneficial action. Nevertheless, actions for the development of cultural and creative industries, for the preservation and socialization of cultural heritage will help to ensure a quality tourist experience based on natural resources and cultural and historical heritage. On the other hand, the support for the tourist regions and the better management of the tourist attractions /landmarks will lead to an increase of the revenues and benefits for the local communities from the development of tourism through the utilization of the products of modern culture and local cultural heritage. In this direction it is envisaged to improve the tourist registers, preservation, maintenance and development of the attractions and the related infrastructure, creation of modern visitor centres to the main attractions, marketing of the tourist product and promotion of tourist products with higher added value (Council of Ministers, 2020), as well as the sustainable development of the regions of the country on the basis of the specific local potential.

Tourism was not included in the drafts of the **National Recovery and Resilience Plan** (Next Generation mechanism), (Council of Ministers, 2021), but after discussions and establishment of a special working group by the Minister of Tourism, in the latest version, published on 20th of July 2021, tourism enterprises are included as beneficiaries in the Energy Efficiency Fund within Pillar 2. "Green Bulgaria", Low carbon component. Tourism may also benefit from Pillar 3: "Connected Bulgaria", Transport connectivity component, Investment 7: Green mobility. It is

envisaged that tourism will receive support horizontally and within Pillar 1. "Innovative Bulgaria", Intelligent Industry Component, Investment 2: Programme for economic transformation.

Sustainability reporting

The National Statistical Institute (NSI) provides data since 2000/2001 and elaborates annual publications "Sustainable Development of Bulgaria" (NSI, 2021). The **System of Sustainable Development Indicators** of Bulgaria is a result of a joint project of Eurostat and NSI and the set consists of 10 themes and 64 indicators, which are chosen on the basis of 14 criteria related to data relevance, quality, validity, etc. The indicators affect economic, social, environmental and institutional issues related to sustainable development. The structure of the indicators' set has two levels, 13 key indicators are defined that meet the key challenges to sustainable development both at national and European level. No indicators are directly related to tourism but many of them are crucial for sustainable tourism development.

NSI has also introduced the **Tourism Satellite Accounts** (TSAs) as an internationally accepted statistical system for description, classification, and analysis of tourism expenditure. Application of this statistical system is designed to estimate all expenditure related to tourist trips made before, during and after the trips. On the webpage of NSI data is available since 2008. It is considered that TSAs are not able to generate those variables that determine the impact on the whole economy, through which comprehensive policies can be conducted. In that relation a special report has been recently elaborated for the Ministry of Tourism (May 2021), related to the opportunities for establishing an analytical framework and tools for evaluation of the contribution of tourism to the national economy (Ministry of Tourism, 2021b), providing 24 specific recommendations for improving the existing methodology for reporting.

In July 2020 Bulgaria presented its first voluntary **national review of the implementation of the UN sustainable development goals**, choosing to report on all 17 goals (Voluntary National Review, 2020). The activities for the preparation of the report were assigned to an external to the state administration team of university professors and representatives of civil society organizations. The reason for that is that the country has not developed a national strategy for sustainable development as a separate document, has not agreed on priority goals and has not formed a coordination mechanism to monitor the progress. The process revealed the clear need to build a national mechanism for coordinating the implementation of the UN Sustainable Development Goals with the participation of the government and a wide range of stakeholders. The main conclusion is that, as most other countries, Bulgaria is lagging behind in achieving the goals, especially in the field of education, healthcare, reliable implementation of nature protection legislation, etc.

Implemented policies in relation to COVID-19 pandemic

To support the tourism sector in the conditions of the pandemic, measures have been developed and introduced for the implementation of the following governmental policies:

- Protection of the intermediary sector in tourism through grants; regarding the obligations of tour operators, through legislative decisions the postponement of payments to tourists was achieved, as well as offering vouchers to passengers and tourists as an alternative to reimbursement of amounts paid for cancelled package travel and transport services;
- Job retention and promotion of employment through compensation in the amount of 60% of the employee's insurance income, and financial support for reintegration of unemployed persons; additional monthly compensation was provided for each job retained in the sectors “Transport”, “Hospitality & catering”, and “Tourism”. More than 22,000 jobs in the tourism sector were preserved;
- Promotion of inbound tourism through state aid for inbound tourism charters of EUR 35 per seat of the maximum passenger capacity of the aircraft for each flight;
- Financial support to tour guides;
- Support of domestic tourism through one-time assistance (vouchers) for the use of basic tourist services (accommodation);
- Support of other tourist activities (except accommodation and intermediaries) through tax relief, reduction of fees, rents and concession taxes;
- Development of uniform rules (instructions, protocols) for work and service provision in tourist facilities;
- Crisis programme for national tourism promotion for 2020.

4.3.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

The National Sustainable Tourism Policies and Strategies, as described in the previous section, are complemented by regional and local strategies, plans and programmes that the regional and local authorities are required to adopt pursuant to the provisions of the Bulgarian Tourism Act. Furthermore, the adoption of the new Tourism Act and its entry into force in 2013 have initiated an entirely new process, implementing a concept of tourism regionalisation of Bulgaria into 9 tourist regions, fully covering the territory of the country.

The role of the Bulgarian regions and municipalities for the tourism development of the country

Before going into further detail, it would be meaningful to bring more clarity on the administrative division of Bulgaria and the potential role of each administrative unit in regard to the adoption of sustainable tourism policies, strategies, plans and programmes. The administrative division of Bulgaria consists of 28 districts, which are divided into 265 municipalities (by the end of 2021 this number should be officially increased to 266 after the forthcoming creation of a new municipality, pursuant to the results of a successfully held local referendum).

The 28 administrative regions (districts) of Bulgaria apply the strategies and policies of the central administration at the regional level, by adopting and coordinating district strategies and programmes for tourism development on the territory of the respective district (Tourism Act, 2013). All district strategies and programmes are being elaborated in respect with the

national priorities for tourism development and the marketing strategy of the said district, without neglecting the local tourism resources and necessities.

Furthermore, in accordance with the Tourism Act (2013), each of the 265 Municipal Councils is legally obliged to define the policy for tourism development on the territory of the relevant municipality and to establish a municipal programme for tourism development, that should be compliant with the priorities of the National Strategy for the Sustainable Development of Tourism in Bulgaria 2014-2030, which is being updated every four years (Ministry of Tourism…, 2018a). Such programme should also be compliant with the existing strategies for the development of specific types of tourism on national level and with the district strategy for tourism development.

Those municipalities that have already elaborated such programmes and plans certainly do bring to the fore and are addressing in their respective local strategies and/or action plans issues, such as the preservation and management of the municipality's cultural, historical and natural heritage, the sustainable management of particular destinations, as well as other activities that comply with the three pillars of sustainable development, namely the environmental, social and economic impacts of the municipal tourism programme on the respective territory.

A concept for a new geographic tourism division of Bulgaria deriving from the latest Tourism Act

Probably the most significant aspect of the regionalisation of sustainable tourism activities lies in the adoption of the new Bulgarian Tourism Act that has entered into force at the end of March 2013. The new law has initiated a process that led to the tourism division of the country into 9 marketing tourist regions and aimed the establishment of relevant organisations managing these specific touristic geographical areas. The aforementioned tourism division does not correspond with the regional administrative division of the country, i.e. does not take into account the actual boundaries of the 28 administrative districts, but is in compliance with municipality borders, avoiding that a particular municipality enters in two tourist regions.

For each of the nine tourist regions a specific tourism specialisation has been suggested, such as cultural tourism, eco-tourism, wine, and culinary tourism, hiking and recreation tourism, rural tourism, adventures tourism, sea tourism, etc. The main specialisation corresponds to the natural resources, cultural and historical heritage and/or other peculiarities typical for the respective geographical areas. Thanks to this novelty and if implemented wisely, sustainable tourism could be more easily addressed and facilitated at regional level than it could have been only through the administrative division of the country.

The positive impact of the new tourism regionalisation is still to be examined and assessed. Its concept, as approved by law by the Minister of Tourism, and the Tourism Act both foresee the elaboration of strong marketing strategies for all the 9 tourist regions. The work is still in progress, but this is undoubtedly a new opportunity for all the municipalities within a tourist region, to adapt their policies and strategies for sustainable tourism according to their respective specialisation and thus providing a strong and winning marketing tourism product

that preserves the environment and puts an accent on the good management of the cultural, natural and health tourism offer, among others.

4.3.2 Key Stakeholders

Partnership and cooperation between governmental institutions and various stakeholders in tourism has been adopted as a leading principle in tourism policy in Bulgaria. Coordination is pursued in their actions as well as at different territorial levels, even though achieving it in practice often appears problematic.

4.3.2.1 Governmental and semi-governmental bodies

Three levels of administrative authorities involved in the planning and management of tourism in Bulgaria are clearly outlined (Marinov et al., 2018). The state policy in the field of tourism is defined by the Council of Ministers and the Minister of Tourism is responsible for its implementation at the national level. The district governors implement the state policy at regional level, while the responsible bodies of local administration are represented by the municipal councils and the mayors of municipalities.

The **Bulgarian Ministry of Tourism**, operating as an independent ministry since 2014, has the responsibility of implementing the state policy in the field of tourism and to coordinate the activities of the ministries and other institutions in regard to its implementation. The main functions of the Bulgarian Minister of Tourism are to lay down the strategic objectives and priorities of tourism policy and design programmes for their implementation, to develop and consult regulations concerning the tourism sector and to ensure the legislative framework for the development of Bulgarian tourism as well as to cooperate with the national, regional, and local authorities in the field of tourism. In regard to particular tourism businesses, the Ministry regulates and controls the activity of travel intermediaries and accommodation, catering, and entertainment establishments, etc.

The National Tourism Council (NTC), established in 1998, functions as a public-governmental consultative and coordination body under the authority of the Minister of Tourism. It assists the minister in the implementation of the national tourism policy. The members of the NTC are representatives of tourism-related ministries and institutions, national, regional, local, and professional tourism associations, national resorts and destination management organisations, associations of air, land and water carriers, consumer associations, nationally representative employers' organizations in the country, as well as the National Association of Municipalities in the Republic of Bulgaria.

The mayor has almost the same duties as the Minister of Tourism but at the local (municipal) level, including the categorisation of lower category establishments (one and two stars) and their control. The mayor is in charge of establishing and managing the *Local Tourism Consultative Council*. Comprising representatives of local tourism stakeholders, this consultative body discusses and approves the *Tourism Development Programme* proposed by the mayor, which is afterwards submitted to the *Municipal Council* for a vote. The programme must include measures and activities for the construction and maintenance of infrastructure, the protection of resources and cultural heritage, the establishment of tourist information

centres (TICs) and information provision, marketing research and promotion. Annually the Municipal Council defines the amount of the local tourist tax, which is used for the funding of the Tourism Development Programme.

District governors have very limited functions in the field of tourism administration and planning. Apart from acting as a transmitter, according to the Tourism Act, the district governor is responsible for developing the district strategy and participating in the development of district tourism development programmes, integrating them into the district strategy, and also coordinating their implementation based on national priorities for tourism development, the marketing strategy of the tourism region, and according to local and regional tourism resources and needs.

Relatively new semi-governmental bodies operating at the regional level are the **Tourist Regions Management Organizations (TRMOs)**, stipulated by the Tourism Act (2013) and set after the scheme of nine tourist regions, covering the whole territory of the country, which were officially approved in 2015. The Tourism Act defines tourist regions as marketing regions whose management is linked to carrying out activities in 3 main areas: 1) Creating regional tourism products; 2) Carrying out regional marketing and promotion; 3) Coordination and management of tourism at regional level. All nine TRMOs were launched in the period 2017-2019 and are currently listed in the National Tourism Register. It is expected that creating tourism regions and their management organisations will help fill the existing gap in the management and marketing of destinations between the local (municipal) level, which is quite fragmented and the national level, thus shifting from national to regional marketing, pooling resources and coordinating activities for the development of a complex, diverse and competitive tourism product, and its efficient promotion. However, it is still early to identify particular actions as the role and results of these destination management organisations are yet to unfold. So far, just one of them has a website and eight TRMOs promote themselves through social networks.

Besides the above listed institutions, almost all ministries and a number of state agencies in Bulgaria are related to sustainable tourism development, since their decisions form the economic and tourism policy, and the results of their activity have a direct impact on the tourism business (Assenova, 2003), which is highly fragmented and mostly comprised of SMEs. Among all different ministries, agencies, and their territorial branches, the Ministry of Economy (ME), the Ministry of Labour and Social Policy (MLSP), the Ministry of Finance (MF), the Ministry of Environment and Water (MOEW), and the Ministry of Agriculture, Food and Forestry (MAFF) with some of their agencies and regional structures are key stakeholders in terms of sustainable tourism and SMEs, and exercise specific tourism-related functions.

For example, the **Ministry of Economy** provides financial support to business entities, including SMEs, in the field of tourism, through the EU Operational Programmes "Competitiveness" (2014-2020) and the forthcoming "Programme for Competitiveness and Innovation in Enterprises" (2021-2027). The Ministry is also involved in the development of the National Recovery and Resilience Plan that will allocate considerable financial resources to address the economic and social consequences of the COVID-19 pandemic and build a more resilient and shock-resistant national economy.

A specific key stakeholder in the field of SMEs is the ***Executive Agency for Promotion of Small and Medium-Sized Enterprises*** under the Minister of Economy. The Agency implements measures aimed at maintaining sustainable economic growth, increasing the competitiveness of Bulgarian enterprises, and promoting their development, stimulating entrepreneurship, and supporting technological and innovative industries, as well as the development of public-private partnerships.

The Ministry of Labour and Social Policy together with the ***Employment Agency*** and the ***General Labour Inspectorate Executive Agency*** implement the state policies on labour, employment, equal opportunities, etc. During the COVID-19 crisis, the Ministry introduced several measures aimed at maintaining employment and social assistance regarding, among others, SMEs in the field of tourism.

The Ministry of Finance formulates and implements the governmental fiscal and tax policy through various tax regulations, including local taxes and fees, corporate and personal income taxes, the value added tax, etc., while *the* ***National Revenue Agency (NRA)*** under the Minister of Finance administers taxes and social security contributions, other public and private state receivables and supervises gambling activities. Any change in the tax system directly affects financial results of tourism companies, as well as the cost and price of the tourist product and the overall competitiveness of tourism SMEs.

The Ministry of Environment and Water *(MOEW)* oversees the implementation of the Environmental Management Scheme (EMAS) in Bulgaria that helps organizations comply with legal requirements and improve their environmental performance while saving energy and other resources. However, less than 20 organisations in Bulgaria have been registered under EMAS since 2013, and none of them operates in the field of tourism. MOEW also manages the three national parks in Bulgaria through the National Park Directorates that are regional bodies of the Ministry.

The Executive Environment Agency under the MOEW manages the National System for Environmental Monitoring and maintains the Register of Protected Areas and Protected NATURA 2000 Zones in Bulgaria that is important to tourism SMEs in relation to the procedures of environmental impact assessment and environmental protection compatibility assessment of investment projects, but also in terms of knowledge dissemination and possibilities for specific product development in protected areas.

The Ministry of Agriculture, Food and Forestry widely affects sustainable tourism and SMEs through the implemented policies in all three fields (agriculture, food and forestry) but also provides direct financial support for local capacity-building as well as to tourism-related SMEs to stimulate non-agricultural activities and economy diversification in rural areas through the EU Operational Programme for Rural Development. Through its executive agencies (***Bulgarian Agency for Food Safety***, ***Executive Agency for Vine and Wine***, ***Executive Forest Agency***), the Ministry controls the quality of food, keeps a register of retail outlets where food is offered (including restaurants); controls the wine sector, respectively influences the development of wine tourism; manages nature parks as well as the state hunting farms, which has a direct impact on the development of ecotourism and hunting tourism in the country.

Of particular relevance to green tourism and SMEs in Bulgaria are the protected areas (occupying roughly 5% of the country's territory) and the protected zones under the EU NATURA 2000 network (34% of the county's territory). Among them, national and nature parks draw special attention, since they are relatively large and very rich in various resources for tourism development but are also highly vulnerable to negative tourism impacts. Moreover, their management is strongly involved in tourism planning, establishing partnerships with local communities and tourism businesses, as well as in capacity building for sustainable (tourism) development.

National parks are protected areas of state property and do not include settlements; the ecosystems are entirely of natural origin, with great diversity of plant and animal species and habitats. National parks fall into the II IUCN category. There are 3 national parks in Bulgaria with a total area of 193,000 hectares. They are managed by National Park Directorates - regional bodies of the Ministry of Environment and Water that operate as independent legal entities supported by the national budget.

Nature parks are protected areas including diverse ecosystems of plant and animal species and their habitats, with characteristic and remarkable landscapes and inanimate objects. They fall into the V IUCN category. In a nature park, the ownership does not have to be state-owned and the inclusion of settlements in its territory is allowed. The main goal of their management is the protection and maintenance of biological diversity, providing conditions for tourism development and preservation of traditional livelihoods and original crafts. There are eleven Nature Parks in the Republic of Bulgaria that are managed by Park Directorates established within the Executive Forest Agency under the Minister of Agriculture, Food and Forestry.

4.3.2.2 Tourism Associations

Tourism associations form an important part of the current institutional framework of Bulgarian policy for sustainable tourism development providing opportunities for communication and coordination among different stakeholders and presenting interests of various sectors within the highly fragmented and competitive tourism industry. However, the large number of associations established over the last years result in problematic interaction among potential partners and often hinders dialogue and efficient decision-making instead of facilitating them.

According to the Register of Tourism Associations maintained by the Ministry of Tourism, as of July 2021 there are 219 tourism associations in Bulgaria united in five groups: branch tourism associations (12), local tourism associations (168), product tourism associations (12), professional tourism associations (14), and regional tourism associations (13, excluding the above mentioned TRMOs).

Most of these associations mention sustainable tourism in their statutes and goals but those that are active in promoting sustainable and responsible tourism are relatively few. Among them, several organisations stand out:

The Bulgarian Tourist Union (BTU) is the oldest tourism association in the country established in 1895 with the initial purpose to promote nature beauty and hiking tourism among Bulgarian residents. Since then, it has been constantly engaged in various cultural, educational, and environmental activities. During its 125-year history BTU has developed a wide network of hiking routes (about 2150 km) and mountain chalets (> 200) as well as numerous local associations for hiking tourism throughout the country. The 100 Tourist Sites of Bulgaria

national movement is probably the best-known BTU initiative that is popular among Bulgarians for decades. **The 100 Tourist Sites of Bulgaria movement** was established in 1966 to promote Bulgaria's most significant cultural, historic, and natural landmarks. Each of the sites has its individual seal, which is stamped onto pages of an official passport-like booklet issued by the BTU that can be purchased at a symbolic price. A reward scheme has been developed to encourage collection of as many stamps as possible. Depending on the number of stamps collected, participants may receive bronze, silver, or gold badges. Twenty-five stamps earn bronze, fifty stamps earn silver and a hundred stamps (a complete booklet) earn gold.

The Mountains and People – Bulgarian Association of Mountain Leaders in Bulgaria was established in 1997 as a non-profit organization by individuals and organizations, who share professional and hobby interests regarding nature in the mountains. The aim of the association is to help and encourage the development of sustainable, eco-tourism and outdoor activities in Bulgarian mountain regions. It also aims to promote environmental-friendly behaviour, and boosts the creation and improvement of basic infrastructure, landmarks, and equipment in the mountains to address safety issues. The association has played a significant role in implementing the profession of mountain guides in Bulgarian legislation as well as in establishing the guidelines of mountain guides' education. At present the association has 45 members, who are active mountain guides, working in Bulgaria and abroad.

The Bulgarian Association for Rural and Ecological Tourism (BARET) and **the Bulgarian Association for Alternative Tourism (BAAT)** are national product orientated organizations including local authorities, regional and national environmental NGOs, national parks' administrations, tour agencies and accommodation businesses involved in the development of alternative forms of tourism. They aim to promote and elaborate programmes for alternative tourism development and coordinate the business with national, regional, and local authorities to solve problems in the field. Both organisations were established in the 1990s and have been important participants in sustainable tourism development, but recently BARET has disappeared from public space, while BAAT keeps very active.

BAAT encourages and supports partnerships for the sustainable development of alternative forms of tourism at a national, regional, and local level in order to preserve natural, cultural, and historical heritage of Bulgaria and help the country become a better place for living and doing business. BAAT deals particularly with small business entities – guesthouses and operators of special interest and adventure tours, and has implemented a number of initiatives to promote sustainable tourism in Bulgaria:

- *The **Green Lodge certificate*** issued to guesthouses and small hotels that correspond to ECEAT sustainable tourism label and Eurogites quality standards.
- *The **EcoVeloTour Project*** facilitates development of ST in the Danube region along EuroVelo routes via enhanced and ecologically sound framework of tourism destination management and extending cycling tourism, unfolding neighbouring regions beyond the EuroVelo route.

- *The **Go Responsible Project*** aims to develop and strengthen the key competencies and entrepreneurial knowledge of young people in the field of Responsible Tourism (RT) through mentoring, non-formal education, and training materials.

Another experienced tourism association with a particular focus on sustainable tourism is the **Pirin Tourism Forum (PTF)**. It was established in 1997 as the successor of the three-year Project for Eco and Sustainable Tourism in Pirin and Rila (PREST, 1994-1997) funded by the British Know How Fund. The founders were municipalities from Blagoevgrad Region and the Pirin National Park Directorate. The PTF acted as the regional tourism board for Southwest Bulgaria for about 13 years. At present, it is rather a product tourism association focused on the development of sustainable tourism throughout Bulgaria but also in the border areas of neighbouring countries. It currently initiates the creation of a Bulgarian community for the interpretation of natural and cultural heritage in tourism and education. For now, the community will be an informal civic network including individuals and legal entities wishing to promote the topic of interpretation in the Bulgarian public space, and the PTF will act as its coordinator.

More active tourism associations focused on sustainable tourism development and operating at national, regional, or local level are included in the National Tourism Register of Bulgaria.

4.3.2.3 NGOs, Sustainable Tourism Networks and Partnerships

Besides the above presented tourism associations, key stakeholders supporting SMEs (including those in the field of tourism) are NGOs that have been working for more than two decades to create a better economic environment for SMEs and increase their competitiveness. Such NGOs are the **National Association of Small and Medium Business** and a number of **Regional Development Agencies** operating in different parts of the country. They support SMEs through information services, preparation of business plans and investment projects as well as by providing tax, accounting, and legal advice. Many of them are specialized in the preparation of projects for grants from the EU funds and national funding programmes and provide different kinds of trainings.

Two NGOs in Bulgaria, that are not tourism associations, are particularly focused on sustainable tourism related certification of destinations and SMEs. The **Bulgarian Blue Flag Movement** (established in 1993) carries out various activities and initiatives dedicated to nature protection, environmental education and awareness raising, including the Blue Flag Programme that certifies beaches that meet environmental standards. It has recently started the Green Key Programme aiming to raise the awareness of leisure establishments´staff and clients, to increase the use of sustainable methods of operation and technology, to run ecologically sound and responsible businesses, and thereby reduce resource and energy usage. The **Authentic Bulgaria Association** has been managing certification of cellars, accommodation establishments, and destinations since 2006. It has recently implemented projects introducing pilot certification schemes for tourism SMEs in the cross-border region of Bulgaria, Serbia, and Romania.

Some younger organisations are active in the field of sustainable tourism and SMEs, too. For example, the **Green Synergy Cluster** brings together and coordinates the knowledge and experience of companies, research entities and public authorities interested in the green transition. The cluster is a one-stop shop for green innovation and solutions. Its mission is to support businesses for green growth by providing innovative energy services. Another example is the **Ecosystem Europe Association** that provides consultations on the implementation of the formal environmental management system (EMAS). They also adapt and develop various educational programmes regarding sustainable (tourism) development and deliver out-of-school courses, targeting educators, school, and university students.

In Bulgaria there are environmental and other NGOs that are not explicitly focused on SMEs but have been active for years in promoting green tourism and sustainable tourism ideas, and have established effective sustainable tourism networks and partnerships, as well as successful ecotourism attractions.

ForTheNature Coalition is the largest environmental alliance in Bulgaria that unites more than 30 NGOs and numerous civic groups. They state active position regarding nature preservation against investments in protected areas that often violate the environmental legislation and are particularly involved in causes and actions related to sustainable tourism development, biodiversity protection, and climate change.

Bulgarian Biodiversity Foundation (BBF) was founded in 1997 as the successor of the established in 1994 Bulgarian – Swiss Biodiversity Conservation Programme (BSBCP). For more than 15 years BBF has been working on conservation of biodiversity, encouraging participation of citizens and local communities in managing natural resources and protected areas as well as raising public awareness on the issues of biodiversity and nature protection. Sustainable Tourism is among their key areas of activity through disclosing biodiversity in its social, ethical, cultural, and economic dimensions and presenting opportunities for sustainable business development. BBF has been engaged in the preparation of a number of management plans for protected areas, action plans for endangered species from the IUCN Red List and a number of trainings about biodiversity benefits and sustainable use. It also assists the establishment of 6 information and nature conservation centres in Bulgaria. BBF is a member of IUCN, BAAT, and the ForTheNature Coalition.

The Association of Parks in Bulgaria (APB) works with local communities, environmental and other NGOs, local and central authorities, media, and business to support the sustainable management of natural resources in Bulgaria. Their goals include promotion of the importance of protected areas; support to income generation in parks and surrounding areas; building ecological culture among the population. APB is part of the ForTheNature Coalition and initiates nature conservation advocacy campaigns within the coalition, as well as independently.

A key stakeholder in the field of highly specialized nature-based tourism is **the Bulgarian Society for Protection of Birds (BSPB)**. They are part of BirdLife International and work to protect wild birds and their important habitats, thus contributing to the sustainable use of natural resources and human well-being. By building a network of nature conservation visitor

centres, BSPB develops ornithological tourism and ecotourism in Bulgaria. Currently, they run two visitor centres in Bulgaria providing specialised infrastructure and services for bird watching in areas of exceptional biodiversity.

The Four Paws Foundation works for a world in which people treat animals with respect, understanding and compassion. Most of their projects do not refer to tourism but one of them, mutually funded with the Brigitte Bardot Foundation and implemented in cooperation with the mountain municipality of Belitza in 2000, has been developed as a key ecotourism attraction in Bulgaria - the Dancing Bears Park is aimed at readaptation of previously mistreated bears and stretches over 12 ha at an altitude of 1200 to 1345 m.

Another organisation tightly related to the sustainable development concept is **Slow Food in Bulgaria**. This is a national structure of the international Slow Food movement that promotes local food and traditional cooking. The Slow Food movement started from Italy in 1986 and has spread worldwide striving to preserve traditional cuisine and promote small local businesses and sustainable foods. Bulgaria has been on the Slow Food map since 2004. For the last 15 years, food activists in the country have established a network of local and regional structures and added more than 50 products to the Ark of Taste (an online catalogue of endangered traditional foods). Their activities are aimed at the preservation of local traditions and gastronomic knowledge as well as stimulation of sustainable development by connecting food producers with their consumers (both individual customers and restaurants), thus establishing a bi-directional relationship that will on the one hand create new income opportunities for people in villages, and on the other diversify the food on offer for citizens and visitors to tourist destinations.

4.3.2.4 Relevant research and educational bodies

Formal tourism education in Bulgaria is carried out at three levels (school, college, and university) as well as in licensed vocational training centres. There are several bodies responsible for educational institutions including those in the field of tourism. The main authority is the **Ministry of Education and Science** which approves education programmes at secondary, college and university levels. The ***National Evaluation and Accreditation Agency*** has been set up to control the quality in higher education institutions (HEIs).

In 2002 a system of professional fields of higher education was established, according to which Tourism bearing the Code 3.9 was placed in the professional field of 3. Social, Economic and Legal Sciences. More specific programmes fall under 3.8 Economics (Economy of Tourism) and 4.4. Earth Sciences (Geography of Tourism). In 2010, the Ministry of Education and Sciences commissioned the establishment of a rating system for higher education institutions. It was developed by independent consultants, and draws information from international and national data banks, public opinion polls, and universities' databases.

According to the Register of Higher Educational Institutions in Bulgaria, as of July 2021 there are 14 HEIs officially accredited in the professional field 3.9 Tourism which provide educational services and prepare students in professional Bachelor's degrees, university Bachelor's degrees and at Master's degree level. Among them there is one private college, and the rest are universities – ten public and three private ones. Six universities (four public and two private)

provide PhD programmes in Tourism, Economy of Tourism, or Geography of Tourism and Recreation.

In Bulgaria there is no commonly accepted general framework for study curricula in tourism, and a wide number of programmes in tourism with different emphasis can be found. Generally, a gap is acknowledged to exist between provided higher tourism education and the industry needs (Dogramadjieva, Vodenska, and Marinov, 2016). HEIs are striving to bridge this gap but few of them explicitly focus on sustainable tourism issues in their curricula and courses on offer.

Sofia University "St. Kliment Ohridski" - as the traditions in tourism education in the oldest Bulgarian university are rooted in geography, provided Bachelor, Master and Doctoral programmes emphasize on the system of tourism and its environment, on the territorial aspects of tourism development and the interaction of public and private sector organisations, as well as on tourism analysis and management at a destination level. Education is oriented rather toward generic tourism studies than toward vocational training but also stresses on business knowledge and skills, thus providing comprehensive understanding of the phenomenon of tourism together with promotion of entrepreneurial spirit, which is essential from sustainable tourism development and responsible tourism perspective.

International Business School offers a Bachelor programme in Tourism & Entrepreneurship, but special attention is paid to the issues of sustainable tourism development in their Master Programme in Tourism Management.

South-West University "Neofit Rilski" is the only university in Bulgaria that offers a brand-new Bachelor programme in Sustainable Tourism (launched in 2021).

New Bulgarian University offers a Master Programme in International Alternative Tourism.

University of Forestry offers Bachelor and Master programmes in Alternative Tourism in the Faculty of Business Management.

Agricultural University-Plovdiv is a leading national centre of agricultural science and education in Bulgaria. It has developed a Faculty of Economics since 2006 that offers an interdisciplinary Master programme in Sustainable Use of Nature and Ecological Tourism.

Vocational training in Bulgaria is carried out under the supervision of the specialised ***National Agency for Vocational Education and Training*** which develops a national network of licensed institutions for vocational training of persons over 16 years of age and implements subsequent control over their activity. As of July 2021, the Register of Licensed Centres for Vocational Training contains 477 entities that are allowed to conduct vocational training for various professions in the field of hotel, restaurant, and catering business as well as 299 entities – in the field of travel, tourism, and leisure. However, information on the courses offered over the last years reveals the presence of a limited number of active providers of such educational services. Among them, only the **Vocational Training Centre** affiliated to **the Mountains and People Association of Mountain Leaders in Bulgaria** explicitly deals with sustainable tourism issues.

4.3.2.5 Individual tourism businesses and destinations of particular relevance

According to the National Tourism Register, as of July 2021, in Bulgaria there are 18,492 registered accommodation establishments; 18,564 catering facilities; 4,537 travel agencies and tour operators; 165 Balneotherapy (Medical SPA), SPA, wellness, and thalassotherapy centres, as well as 1,522 licensed freelance tour guides and mountain guides. More than 98% of the economic entities in the Bulgarian tourism industry are SMEs and many of them declare, in one way or another, commitment to the principles of sustainable development and corporate social responsibility.

Of particular relevance to the ETGG 2030 project are numerous micro-, small and medium tourism businesses operating in the field of rural, adventure, and ecotourism that have obtained considerable popularity over the last two decades. These are mainly SMEs providing accommodation and catering in destinations of exceptional natural beauty, preserved biodiversity and lively rural communities (often in NATURA 2000 zones, Nature Parks, or National Parks' adjacent areas), as well as tour operators offering specific services or complete packages based on local heritage, active live, and environmental and social responsibility. There is no official statistical data on the number of such companies in Bulgaria, but these are hundreds of micro and small enterprises with 2-3 to 10-15 employees. Several examples of accommodation establishments and tour operators explicitly engaged with sustainable tourism policies that can be considered local leaders and key stakeholders in sustainable tourism development are briefly presented below:

Deshka Guest House is among the first and most successful actors in the field of rural and ecotourism in Bulgaria. It is located in the village of Gorno Draglishte, in close proximity to Rila and Pirin National Parks. Unique services provided by the hosts include traditional food entirely prepared with products grown in their own yard or supplied by relatives and fellow villagers; classes in local cooking and crafts (weaving, spinning a york, knitting); traditional dancing. They are committed to environmental policies: organic waste is given to the pig or composted; photocells and energy-saving light bulbs are installed. They help maintain the construction of eco-trails in the area. Along with other tourists, school groups are welcomed and taught in respect to nature and traditions. Deshka Guest House is a Green Lodge certified member of BAAT.

Odysseia-In tour company is a leading special-interest tour operator for culture, active & adventure tours founded in the early 1990's. It is a pioneer of alternative tourism and responsible travel in Bulgaria specializing in off-the-beaten track experiences with itineraries throughout the country and the whole Balkan Peninsula. The company is a founder of the Bulgarian Association for Alternative Tourism and is tightly related to the Mountains and People - Association of Mountain Leaders in Bulgaria, as well as to other sustainable tourism businesses. Over many years it has initiated and been engaged in numerous environmental causes and in 2015 became the first Bulgarian tourism company to receive the Travelife CSR certification as a recognition for its commitment to sustainable tourism and responsibility.

Traventuria Ltd. offers guided and self-guided hiking and trekking tours as well as highly specialized bird watching and wildlife tours in Bulgaria. It is the only adventure company in the

country that has received Certificates of Excellence by TripAdvisor every year since 2012. Since 2016 the company has offered trips with a cause - responsible journeys outside the stereotypical tourist routes to places of amazing nature and diverse authentic culture. There is an educational focus in each trip and support to small local businesses is provided. Traventuria is a BAAT member.

Balkan Treck Ltd. founded in 2002 has also established itself as one of the leading eco-tourism operators in Bulgaria committed to responsible tourism. It offers wildlife and walking holidays as well as cultural tours in BG. Building close, long-term relationships with the local people and communities, as well as partnerships with some of the most respected and effective local, national and international conservation organisations working in Bulgaria, they make great efforts to ensure that all offered walking and wildlife holidays in Bulgaria are not only of the highest quality, but organised in an environmentally and culturally sensitive manner.

Gabi Tour Ltd. is a company that has been organizing adventures in the Eastern Rhodopes since 2005, thus promoting a Bulgarian peripheral region of exceptional biodiversity and cultural heritage. The company specializes in cultural trips, ecotours, and programmes for mountain biking and kayaking. They are founders of the New Thracian Gold Tourist Network that was established some ten years ago to promote sustainable entrepreneurship and combine organic farming, nature conservation and development of ecotourism. Together, they have developed the Trans-Rhodope cycling route, created tourist guides and maps of the region, etc. In 2015 the company was nominated for the Annual Bulgarian Biodiversity Foundation Awards in the category "Business Supporting Biodiversity" for actively participating in environmental initiatives.

4.3.3 Activities and instruments for the development of sustainable tourism

4.3.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

The described projects, initiatives and campaigns include only those that have been under direct responsibility of the state tourism administration or have been implemented with its public support.

In 2007 the United Nations Industrial Development Organization (UNIDO) and the State Tourism Agency (now Ministry of Tourism), started the implementation of a 3-year Programme for sustainable development of enterprises in Bulgaria, with focus on enhancing local expertise in Cleaner Production (CP) and Corporate Social Responsibility (CSR). The project was financially supported by the Government of Switzerland and the partners of the project included the Bulgarian Hotel and Restaurant Association, the Balkan Institute of Labour and Social Policy and the Stara Planina Regional Tourism Association. The Programme's main priorities were:

- raising awareness about the importance of sustainable development in the tourism sector through training local experts to build national expertise on CP and CSR, and in-plant assessments of Bulgarian hotels applying the two methodologies,
- establishing Bulgarian examples of best hotel practices in CP and CSR to be disseminated widely throughout the country and abroad.

Within the project three training modules with a total duration of 15 days were organized and 40 Bulgarian experts were trained to apply both methodologies (20 in Cleaner Production and 20 in Corporate Social Responsibility). In-plant assessments of selected 28 hotels in the regions of Sofia, the Central Balkan and the Black Sea coast were conducted. Considering the importance of introducing CP and CSR measures in tourism related enterprises from the supply chain, 5 enterprises representing hotels' suppliers - the food industry and supply of foodstuffs, paper and furniture production, have also been assessed. In 2008 and 2009, in close cooperation with the State Agency for Tourism altogether 9 seminars at Destination Management Organizations (DMOs) with more than 250 participants have been organized successfully in the potential tourist regions of Bulgaria with the aim to facilitate the establishment of DMOs in the tourism regions of the country and by now are fully set up. Within the project close cooperation with the Swiss tour operator Kuoni was established, which annually contracts about 100 hotels in Bulgaria. The main tool, on which the cooperation was based, was the Travelife auditing system. The joint activities of UNIDO and Kuoni included trainings in 2009 and 2010 for companies from the accommodation sector (representatives of 25 contracted hotels at the Black Sea Coast participated each year with more than 120 attendees in total), awareness raising initiatives (pre-assessment survey about the perceptions of hotel managers on CP and CSR issues), assessment of Kuoni partner hotels for CP and CSR to facilitate the compliance with the Supplier Code of Conduct, applied by Kuoni for all the suppliers throughout the world.

As a follow-up Bulgaria was selected as a pilot rural destination in the European Hotel Energy Solutions (HES) project in collaboration with the United Nations Environment Programme (UNEP), the World Tourism Organization (UNWTO) and others, and the pre-developed electronic self-assessment tool in energy efficiency of hotels was tested in 30 establishments, located in the Strandzha Mountain.

The State Agency for Tourism was a direct beneficiary of the Regional Development Operational Programme (2007-2013) – Priority axis 3. Sustainable Tourism. To utilize the available funds a Mid-term investment programme was developed as a framework of 13 projects to be implemented in 2 phases. Of special interest is one of the fulfilled projects: "Promotion of quality and sustainable development of tourist enterprises". As a result of that project two fully ready-to-introduce systems for voluntary certification of quality and sustainable development in tourism have been prepared, which for different reasons are not utilized yet. The main issue that could not be resolved was which model to select for the management of the systems.

In the same period tourism enterprises (mainly hotels) could benefit from the financial grants under the Competitiveness Operational Programme (2007-2013) through the programme "Energy efficiency and green economy". About 50 hotels were granted 50% of the amount of their projects to improve the energy efficiency of the hotel facilities.

Bulgaria was involved in the Pilot Testing of the European Tourism Indicator System (ETIS) in the Bulgarian Danube Region in 2014 through the Focal Point Destination Danube of the Danube Competence Centre (set up at the Ministry of Tourism) and funded by the German Association for International Cooperation (GIZ). The methodological approach was fully

implemented also in 2015 in the same region, as well as in Sofia Municipality. The recommendations for improvement were reported to the EC and as a result of the awareness raising the system (partially or fully) was accepted in the monitoring systems of the tourism strategies of Sofa, Rouse and other municipalities. The updated version of ETIS is fully reflected in the monitoring system of the current National strategy for sustainable tourism development.

The Ministry of Tourism participates in the European Destinations of Excellence project (EDEN), contracted by the European Agency for Small and Medium Enterprises of the EC, aiming to promote models of sustainable tourism development throughout the European Union. Under the initiative, two types of invitations are announced. The first type of the calls for proposals involves funding the eligible costs for a national competition to select the excellent national tourist destination on a topic determined by the EC. As a result of the competition, one tourist "excellent destination" and up to 4 runners-up for each participating country are chosen. So far, Bulgaria has successfully participated in five editions of the EDEN project for selection of new little-known destinations – in 2008, 2009, 2010, 2017 and 2019 with altogether 17 selected winners and runners-up (Ministry of Tourism, 2018). The second type of EDEN calls for proposals focuses on conducting promotion campaigns and raising awareness of the best European destinations that have already been selected under the first type of calls for proposals. Bulgaria has already conducted three editions of a communication campaign aimed at promoting the selected EDEN destinations and raising awareness of the EDEN initiative in the periods 2011/2012, 2016/2017 and 2018/2019 (funded by the COSME Programme 2014-2020).

The Ministry of Tourism is a direct beneficiary in the project BG16RFOP002-2.010-0002 “Increasing the capacity of SMEs in the tourism sector by supporting the establishment and operation of the Organizations for management of the tourist regions” under the Innovations and Competitiveness Operational Programme (2014-2020) (Ministry of Tourism, 2018c). The project aims at increasing the competitiveness of small and medium-sized tourism enterprises by raising the awareness of SMEs, the quality of the tourist product and the tourist service, and at improving the capacity of SMEs and facilitate their access and presence on national and international markets through participation in events and exhibitions. The second phase of the project, named “Improving the quality of SME services in tourism through the use of information and communication technologies (ICT) and web-based marketing” started in 2019 with a duration of 3 years.

4.3.3.2 Marketing and information services supporting sustainability in tourism

In 2015 the Ministry of Tourism has developed and uploaded on its webpage a Guide for EU financing of the tourism sector in the period 2014 – 2020 (Ministry of Tourism, 2015). This practical guide aims to help tourism entrepreneurs by raising their awareness of the possibilities for financing activities to improve their product and its market realization through the EU funds and programmes. The guide was updated in 2017. Detailed information is provided on the eligible beneficiaries, including SMEs, and the range of feasible activities. SMEs from the tourism sector are eligible for projects under the Innovation and

Competitiveness Operational Programme, the Programme for Transnational Cooperation Balkans - Mediterranean Sea 2014-2020, the INTERREG Europe Programme 2014-2020 and COSME Programme 2014-2020.

As already mentioned, the Ministry of Tourism is involved in the promotion of Bulgarian destinations of excellence (EDEN destinations) through communication campaigns, including videos, Facebook online games, participation in fairs and exhibitions, fam trips for bloggers, promotional image brochures, integration of the EDEN destinations in the online channels of the ministry, special online platform of the Bulgarian EDEN destinations, online bulletin in Bulgarian and English, etc.

4.3.3.3 Tourism Sustainability Certification Systems and Awards

National Annual Tourism Awards*:* In 2016, the Ministry of Tourism announced the holding of annual awards for various stakeholders in the tourism industry. The aim of the competition is to encourage the development of Bulgarian tourism by promoting tourist sites and destinations, to increase the competition in tourism and the quality of tourist services, to help overcoming the seasonality in tourism, by stimulating specialized sustainable types of tourism and the introduction of innovative practices in the industry. There are 16 categories in which the participants can be nominated. Evaluation criteria for each category are defined, as well as a set of quantitative and qualitative indicators and measures according to which the evaluation is carried out.

Blue flag: The Blue Flag programme is a voluntary certification procedure for beaches and marinas, managed by the International Foundation for Environmental Education (FEE) - a non-governmental organization that includes national organizations from over 70 countries around the world. Its representative for Bulgaria is the Bulgarian Blue Flag Movement. The Blue Flag for Beaches and Yachts programme has a history of over 18 years in Bulgaria. Thirteen beaches and one yacht port in Bulgaria have achieved the blue flag world standard for 2021. In the period 2014-2020 the average annual number of certified beaches varies between 10 and 15.

Green Key: Green Key is an eco-label, whose representative for our country is the Bulgarian Blue Flag Movement, which aims to raise the eco-awareness of employees and customers of hotels around the world in order to use only sustainable work methods and technologies, so that the provision of hotel services to be responsible and environmentally friendly, seeking to reduce the use of resources, water and energy and save significant funds. In addition to hotels, campsites, restaurants, conference centres, amusement parks and entertainment facilities can also be certified according to Green Key standards. Two large hotels in Sofia are currently certified.

Green lodge: Green Lodge is a certificate issued to guesthouses and small hotels that correspond to the sustainable tourism label of the European Centre for Ecological and Agricultural Tourism (ECEAT) and the Eurogites quality assessment standards. It distinguishes holiday facilities that place emphasis of outstanding hospitality, care for the natural environment and traditional representation of ethnographic diversity. The certification is carried out by the Bulgarian Association for Alternative Tourism. The promotion guide for 2009 contains information about 105 B&B and small hotels but currently their number is only 10.

Authentic Bulgaria: The Authentic Bulgaria quality brand is managed by the Authentic Bulgaria Association, which is a non-governmental organization. The programme started in June 2006, and so far, more than 70 of the evaluated over 100 sites have been awarded the brand. Currently 4 hotels, 6 guest houses and one villa are certified. The brand is awarded to accommodation facilities, wine cellars, tourist attractions, routes, settlements and destinations that meet the requirements for an authentic tourist product. The main goals of the brand are to increase the competitiveness of Bulgaria as a tourist destination and to attract more solvent tourists who are looking for high quality services and an authentic, memorable experience.

Travelife:Travelife is an internationally recognized sustainability programme. The Travelife Certification standard integrates both management and performance criteria and is based on leading international sustainability and CSR standards and guidelines. 10 Bulgarian tour operating companies have been awarded the standard, one of which got Travelife Certified status (excellence in sustainability), as well as 19 hotels in the seaside resorts of Bulgaria.

Strandzha Nature Park: The regional brand of Strandzha Nature Park aims to develop local products, agriculture, tourist services based on the sustainable use of natural resources and the "green" public image of Strandzha Mountain. Various sites have been certified, including entrepreneurs in rural and ecotourism, farmers, beekeepers, herb gatherers and others. The regional brand of Strandzha Nature Park is a guarantee of quality for the tourist services and the goods produced within its territory. Seventeen accommodation establishments are currently certified.

PAN-Parks: The PAN Parks (Protected Areas Network) Foundation was founded in 1998 by the World Wild Fund for Nature and the Dutch travel company Molecaten, with the aim of creating national parks in Europe as a network of European wilderness areas where wilderness and high quality tourism facilities are balanced with environmental protection and sustainable local development. It attempted to achieve this through a process of auditing and verification, enabling it by certifying partner parks when meeting particular standards, combined with political advocacy at the local and European level. By the end of 2007, 9 parks from 8 countries were members of the network. Bulgaria was represented by two PAN Parks-certified national parks - Central Balkan and Rila, as well as by several dozen tourist entrepreneurs in their adjacent territory. Unfortunately, due to lack of funds the foundation was closed down (liquidated) in 2014. The European Commission has defined the activities of the Foundation as one of the best initiatives for development and management of sustainable tourism in NATURA 2000 sites.

4.3.3.4 Capacity Building for Sustainable Tourism

On the basis of the sustainability trainings in Bulgaria being identified, the current section aims to outline some common aspects and trends, as well as to serve as a general overview of the situation related to the sustainable tourism trainings in the country.

A. Initial observations on the proposed sustainability training systems for SMEs

Fragmented trainings in the tourism sustainability area in Bulgaria

As outlined in the previous sections, plenty of projects and sustainable tourism activities and initiatives in the country are directly or indirectly linked to sustainable tourism capacity building. This relative abundance is, however, not sufficiently systematised and capacity building is highly dependent on external financing. Their results are often unclear, need further assessment and there is no common policy to address them comprehensively. Furthermore, among all trainings, fragmented as they are, there are really isolated cases of trainings that are exclusively addressed at SMEs (and not individuals) as a training target group. Pursuant to a desk-research of the available trainings systems in Bulgaria, exclusively dedicated to SMEs and to sustainable tourism, only 7 to 8 trainings could be identified. Most of them have been elaborated under EU-funded projects focused on the sustainable tourism topic. Moreover, the capacity building in the tourism sector in Bulgaria is not sufficiently segmented into tourism types (such as environmental tourism, alternative tourism, cultural tourism, ski tourism, etc.). Those segments and such varied tourism offer certainly exist in Bulgaria (as already presented in the report) and are available to the final customer. Nevertheless, the training systems, competences and skills acquired are of a more general character, such as tourism management, hotel management, etc. without taking into account and/or addressing a specific type of tourism.

Project-based trainings

When sustainable tourism programmes were identified, the big majority of them have been conceptualised and made available in the framework of EU-funded projects (Erasmus+ for most of them), some of which led by Bulgarian partners as coordinators and others including Bulgarian partners within the respective project consortiums. As most of the project-based sustainability training programmes have been or are currently being implemented thanks to the Erasmus+ Programme, they allow not only SMEs but also individuals to take benefit out of these trainings.

Online trainings rather than trainings on site, thanks to digital tools

From the training systems being observed, only one has been planned to be conducted *in situ* and has furthermore been planned as a one-time event (training workshop), in the course of implementation of an INTERREG project between Bulgaria and Serbia.

Furthermore, most of the trainings are provided as self-learning and self-examination online tools necessitating registration from the potential learners. Assistance from trainers has sometimes been secured, but most of the time the learners have to rely on their own rhythm and self-organisation management when learning from each module and passing all necessary self-checks in order to receive a certificate and/or the desired knowledge. In most cases, those certificates (when available) are free of charge or obtained after paying a small fee upon completion of a free of charge online training. These certificates are however often not compulsory and sometimes not available if the training is informal and if its main purpose is to raise awareness and/or to just incite learners to use sustainability methods in the management of their tourism business. Two of the trainings are, however, subject to fees or compulsory membership, which requires an investment from the prospective SMEs, which would expect a return on investment as the membership fees might be sometimes high.

Separately from the trainings themselves, it is important to mention that there are tourism SMEs in Bulgaria which already apply sustainable tourism practices without being certified or without passing a training (for instance by encouraging tourists to use towels twice or use water reasonably or buying local food products). However, the certain added value that they are willing to provide in their tourism businesses and also the willingness to target relevant customers' and/or business segments remain scattered as a space and not sufficiently addressed to the public. Many good practices and examples could be presented about the sustainable tourism management in Bulgaria and they certainly exist. However, these examples often remain isolated cases.

Discontinuation and/or lack of maintenance of older training systems

Some of the trainings found appeared as if they were discontinued. The data collection and exploration of the sustainability training systems that were identified showed that some of the online trainings are currently down as e-learning platforms and are not being maintained, which is regrettable. Hence, there seems to be no sustainability in moving those platforms further. Perhaps the lack of further funding is one of the reasons.

Despite the previous observation, there were trainings within the identified projects that served to actually upgrade previous projects and trainings as a knowledge transfer in another context. Some of the transferred modules have served as a starting point for development of the new project's learning and training materials.

B. Specific remarks on the sustainable tourism training spectrum for individuals

Predominance of VET for natural persons over sustainability training systems for SMEs

Another characteristic that is worth mentioning is that Bulgaria has a number of centres for Vocational Education and Training (VET), which focus their trainings on individuals in various sectors, including tourism. The provided VET trainings relevant to tourism, however, are first of all not intended to SMEs *per se* and, secondly, are generally not indented to dig deeply in helping to provide an alternative tourism offer (be it environmental, cultural or both) but are mainly intended to help the trainees to increase their employability and access to the conventional tourism labour market (including marketing, tourism management and low to mid-qualified roles, based on previous education, previous roles in the hospitality industry as a whole, etc.).

Curriculum for students rather than sustainability training systems for SMEs

Another note from the identification work related to sustainable tourism training courses in Bulgaria is that, along with the mentioned VET, several universities in Bulgaria are providing curricula for students in the field of sustainable tourism or more largely in other sustainability disciplines, in order to get them ready for the labour market and offer them labour-related opportunities (or entrepreneurial skills) thanks to proper qualification. The focus, here again, is on individuals in a personal capacity and not as part of employed persons of an SME, whose employees or management might have to pass a sustainability training course. Hence, the capacity building for sustainable tourism in the country remains a personal endeavour that

requires voluntarism from the prospective learners and more generally their specific willingness to acquire new skills and to implement them in their respective business.

4.3.3.5 Financial Support for SMEs in regard to sustainable tourism activities

The COVID-19 pandemic outbreak had devastating consequences on all economic sectors combined, even though some sectors were more affected than others. Two of them have been the travel sector (especially the airline industry) and the hospitality sector. The Bulgarian hospitality sector was not spared either. According to the Employment Agency of the Republic of Bulgaria[6], in April 2020, when the COVID-19 outbreak began to generate its serious impact on public health and economy, the newly registered unemployed persons in the hospitality sector in Bulgaria had increased to over ten thousand people as an absolute value, which corresponded to a 1320.2% (one thousand three hundred and twenty point two per cent) increase compared to the same month of the previous year 2019. Many businesses were forced to cease operations due to the inevitable lockdowns. Supporting these businesses and their employees has clearly become an issue of paramount importance.

Indirect financial support for SMEs in the tourism sector in general

As mentioned in the previous sections of the report, some of the financial support measures related to the hospitality industry consisted of indirect measures that were taken in a COVID-19 context and were directed to the entire tourism sector, regardless of the fact if the eligible businesses were due to perform sustainable tourism activities or not. The entire sector was and is still at stake and has suffered the economic consequences of the pandemic. One of the first support measures for the tourism industry was the reduction of the VAT tax rate from 20% to 9% (reduction operated for hotels, restaurants and catering services, along with the reduction of the VAT amount to 9% for books). Bulgaria has in principle a fixed 20% VAT rate for all goods and services and the reduction of the VAT for the goods and services mentioned above was not welcomed without criticism from some experts and was positively appraised by others. This measure was not new in terms of inception, but the COVID-19 crisis accelerated a process that had started years before the pandemic. In any case, it is for now a temporary measure that has certainly provided some relief for tourism businesses.

Other indirect measures included the reduction of the concession fees on beach concessions (Bulgaria relying much on Black Sea tourism during the summer period). Practically this meant, that if the concessionaire made a reduction on prices for the use of temporary beach infrastructure (such as for umbrellas and/or sunbeds), the concession fees that were due by them would be reduced or even removed in some cases.

Direct financial support for SMEs and funding opportunities in regard to sustainable tourism

Even before the COVID-19 pandemic outbreak, governmental incentives towards sustainability already existed in the form of subsidies and one example is the Law on Employment Promotion in Bulgaria (2002), stating in its Article 55d that for each “green placement” being filled in, the employer’s company shall receive a governmental subsidy for a maximum period of 12

[6] Official website of Bulgarian Employment Agency

months[7]. According to the definition laid down in this law, "green placements" are *placements, which correspond to economic activities, related to the production of goods and to the provision of services, which are contributing to the protection of the environment, according to a list of economic activities approved by the ministers of environment and of labour*. Such incentives do apply for sustainable tourism activities and for the creation of employment in the tourism sector complying with the afore-said definition, as long as the relevant economic activity is on the approved list by the ministers of environment and of labour. However, such support measures are very scattered.

Generally speaking, the financial support for SMEs in regard to sustainable tourism activities is rare and even inexistent. Tourism businesses have to rely predominantly on loans, on other types of debt or equity financing and on EU funding in order to fund their sustainable business initiatives. Private support is sometimes offered by bigger corporations in line with their corporate social responsibility programmes. Most of these private financial support programmes, offered in the form of grant schemes in the fields of environment, education and healthcare, are however destined to the benefit of non-profit organisations having an activity in the afore-mentioned fields. Small grants are also available at municipal level, both for NGOs and SMEs but their impact is very low.

The latest governmental financial support measures were destined for the country's tour operators registered under the Bulgarian Tourism Act as tour operators or travel agents in order to overcome the consequences of the COVID-19 pandemic, but the primary purpose has been to allocate funding in order to compensate travellers that had to cancel their trips due to the lockdowns in many countries and not to support sustainable tourism activities.

Sustainable tourism still not sufficiently demarcated as a separate segment deserving support

In light with the previous observations, the financial support for SMEs in regard to sustainable tourism activities needs upscaling. Sustainable tourism was not sufficiently addressed, and funding was not sufficiently raised even before the COVID-19 pandemic outbreak. The pandemic made the situation even more unclear and complicated, as the recovery of the tourism sector became a national issue in its wider sense. The entire tourism sector needs to be recovered and that is the reason why major opportunities have not been assigned yet for sustainable tourism in a proper sense. It is also true that the post-COVID 19 recovery of the tourism sector not in Bulgaria but globally, offers enormous potential to do it in a sustainable manner. Pursuant to its definition in the Bulgarian Tourism Act (2013), "sustainable tourism" *is any form of development, arrangement or tourism activity that keeps and preserves in the long term the natural, cultural, and social resources and contributes in a positive and balanced way to the economic development and well-being of the people living, working, or residing in those territories.* In a longer term, this definition should be applied and adapted to all types of tourism activities, especially when rethinking the restart of the tourism and hospitality industry in a post COVID-19 context.

[7] Article 55d of the Law on Employment Promotion

4.3.4 Summary and conclusion on national situation

4.3.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

After the turbulent changes in the Bulgarian tourism industry that accompanied the transition from centrally planned to market economy during the 1990s, the tourism sector has been highly fragmented and entirely dominated by SMEs. This has created plenty of new development opportunities in a free competitive environment but has also posed serious challenges to sustainable development in terms of obtaining new skills and expertise, balancing various interests, overcoming existing conflicts and finding ways to partnership and collaboration, effective planning, responsible behaviour, etc.

Since the late 1990s a new model of public tourism policy has been settled in the country, aiming to introduce new approaches and create better conditions for sustainability in the Bulgarian tourism industry (Marinov et al., 2000). Major elements of this new policy include: 1) a shift towards conceptual policy based on medium and long-term planning at national, regional, and local levels; 2) development and implementation of basic tourism policy instruments to support tourism development but also to control it with the reference to the public interest; 3) enhancing the network of policy subjects to promote dialogue among different stakeholders in the face of public institutions, NGOs, and business entities.
Bulgaria has made noticeable advances regarding sustainable tourism and the role of SMEs in it that could be summarized in the following aspects:

- ***Legislation regarding tourism and SMEs has been developed***. Such legislation is connected to a wide range of normative acts but is addressed to the greatest extent in the Tourism Act (2013), the Law on Small and Medium Enterprises (1999), and the Law on Employment Promotion (2002). Important issues of tourism and land use planning are regulated in the Spatial Planning Act (2001), the Act on the Black Sea Coast Spatial Development (2008), and the Regional Development Act (2008), while the Protected Areas Act (1998), the Environmental Protection Act (2002), and the Law on Biological Diversity (2002) deal with environmental aspects of sustainable development.
- ***Sustainable tourism development has been set as a major priority of the national tourism policy.*** It is envisioned in the tourism-related legislation and in all strategic documents at national, regional, and local levels. Strong emphasis is put (at least in declarative form) on overcoming high seasonality and territorial imbalances in the current tourism development, utilizing the existing diverse potential, and creating quality tourism products of higher added value that would contribute to both the preservation of resources and the prosperity of local communities. Climate change adaptation is an emerging theme regarding sustainable tourism planning and policy in Bulgaria, with tourism businesses having a major role to play in applying new technologies and green solutions.
- ***A network of institutional stakeholders has been developed and a range of projects and initiatives in support to sustainable tourism and SMEs have been implemented.***

Key stakeholders include governmental and semi-governmental bodies, tourism associations and other NGOs (business, environmental, etc.) as well as educational institutions and other actors that are particularly active in awareness raising and capacity building for sustainable tourism, destination management and marketing, biodiversity protection and numerous environmental campaigns. As a result of donor projects of international organisations[8] and EU financial support[9] local tourism entrepreneurship has been fostered, a number of new products have been developed, and many destinations have gradually become recognisable, particularly on the rural and ecotourism market. Some projects[10] had a direct impact on sustainable tourism and SMEs in Bulgaria by implementing resource efficiency audit systems, establishing good practices in cleaner production and corporate social responsibility, improving energy efficiency of accommodation establishments, etc.

- ***A number of tourism sustainability certification systems and awards have been introduced***. The Blue Flag Programme, launched in Bulgaria in 1995 to certify beaches, resorts and marinas that meet a set of environmental criteria, was followed by the development of the Bulgarian Inn quality standard for guest houses and small hotels (1998) and the subsequent implementation of the more sophisticated Authentic Bulgaria Quality Mark (2006) and Green Lodge Certificate (2008). A bit later (2008-2010) several regional eco-labels have been developed to certify local products and tourist services based on sustainable use of natural resources in different mountain areas of Bulgaria (Strandzha, Stara Planina, etc.), and more recently (2015-2016) the internationally known Travelife Certification and Green Key eco-label have been introduced in the country as well as the National Annual Tourism Awards.
- ***Increasing number of tourism businesses striving to follow the principles of responsible tourism and sustainable development is observed***. This process is partly due to the numerous projects and awareness raising initiatives that have built a better capacity for sustainable tourism among the supply side over the years but also reflects the increased cautiousness about environmental and social problems among tourists. Such SMEs are providers of accommodation and catering services, operators of various attractions, and travel intermediaries that are committed to environmental and social responsibility policies, try to manage their business in a culturally sensitive manner, and contribute to local wellbeing by fostering local product chains. In fact, many SMEs in Bulgaria apply sustainable tourism practices without being certified.

4.3.4.2 Challenges for the development of sustainable tourism and for SMEs

Despite some indisputable achievements, the Bulgarian policy in support to sustainable tourism development and SMEs suffers serious shortages and is still far from being highly effective. Over a long period of time, it has been strongly dependent on foreign donors, while

[8] British Know How Fund (BKHF), Swiss Agency for Regional Cooperation (SARC), Swiss Programme for Biodiversity Protection (SPBP), US Agency for International Development (USAID), GIZ, etc.

[9] Pre-accession programmes (PHARE, SAPARD), cross-border cooperation programmes, and post-accession funds

[10] Funded by UNIDO, UNEP, UNWTO, etc. and implemented by the state tourism administration or NGOs

the undertaken initiatives have often appeared unsustainable after the expiration of external funding. Therefore, real benefits have not fully met the great expectations of entrepreneurs and local communities (especially in remote, underdeveloped destinations) in terms of the volume and efficiency of tourism demand, and the contribution to local wellbeing and sustainable development (Dogramadjieva and Marinov, 2009).

In a similar vein, the above conclusion refers to the various sustainable tourism certification systems introduced in Bulgaria, that have not led to considerably improved market positions of the certified businesses. Hence, a declining number of applicants for certification and even dropping out of some certification initiatives (e.g. Friends of PAN parks) has been observed over the years.

In a wider sense, the main problems of Bulgarian tourism since the time of socialism, and until nowadays (e.g. territorial imbalances, high seasonality and low value added), are tightly related to the distinct discrepancy between the diverse tourism potential and the one-sided tourism product development, as well as to the contrast between the high level of customer satisfaction with the purely natural and cultural elements of the tourism product on the one hand, and on the other hand - the low quality of services offered and other product elements that require certain cooperation and joint efforts for their maintenance and development. This means that the tourism policy must influence not only the tourist industry in a narrow sense, but also all connected or accompanying activities, as well as its environment (Marinov et al., 2000). Therefore, sustainable tourism development is a matter of shared responsibility among many governmental institutions and a wide range of stakeholders at different levels, which has always been a major challenge, not only in Bulgaria.

In addition, a distinct discrepancy could be noticed between the stated good intentions and political priorities and the real actions of public authorities that are often not in support to SMEs, which are trying to promote sustainable tourism, but to oligarchic circles violating the environmental legislation and the principles of responsible behaviour. For example, despite the well-developed regulations in the field of nature protection, certain problems exist in their practical implementation with construction restrictions being widely abused. Thus, a pronounced conflict between the long term ecological and the short-term economic interests stands in place, while compromises are done mainly at environment's expense. Consequently, after the overbuilding of large sections of the Bulgarian Black Sea Coast, problems like environmental degradation, common infrastructure overload and guest's tranquillity violation have moved to the inner part of the country, damaging regions of precious natural landscapes close to or even within the borders of protected natural areas (Kazachka and Dogramadjieva, 2006).

According to the previously cited evaluation reports of the European Commission and the World Bank (see section 4.3.1 above), Bulgaria is still at the beginning of the process of sustainable development with inefficient resource management and low level of environmental innovation, high air pollution, deficits in terms of conservation and biodiversity and underdeveloped capacity to adapt to climate change.

Current challenges particularly regarding sustainable tourism and SMEs could be summarised as follows:

- ***Lack of clear priorities, consistent long-term policies, and operational goals to assure adequate support and tangible benefits to SMEs striving to develop ST***, e.g. in the field of quality management and marketing, energy efficiency, climate change adaptation, value-chain management and fair trade, etc.
- ***Implementation of isolated projects and "ready-made" decisions***, strongly dependent on external funding and often applying the 'copy-paste' approach without enough consistency with local potential and needs.
- ***Limited direct financial support for SMEs in regard to sustainable tourism activities –*** tourism businesses rely predominantly on loans or other types of debt to fund their sustainable initiatives.
- ***Highly fragmented tourism business with too many NGOs striving to present its interests*** – numerous NGOs are often in counterproductive competition with each other, thus hampering dialogue and effective decision-making instead of facilitating them.
- ***Problematic horizontal coordination and cooperation*** – between the tourism sector and other sectoral policies as well as among various stakeholders within the tourism sector, e.g. public institutions and private businesses; NGOs and official authorities; DMOs and local businesses, etc.
- ***Problematic vertical coordination and cooperation between the different territorial levels*** –national policy sometimes fails to meet the needs of local / regional level stakeholders, while local stakeholders do not always understand higher level policies and in addition, show inclination of searching solutions to local problems at a higher (mostly national) level.

4.3.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

As previously stated in this report (see sections 4.3.3.4 and 4.3.3.5 above), sustainable tourism business initiatives were not sufficiently addressed in the Bulgarian tourism policy and not sufficiently funded even before the COVID-19 pandemic outbreak. The pandemic made the situation even more unclear and complicated, as the recovery of the tourism sector became a national issue in its wider sense. Temporary governmental financial support measures were directed to the tourism sector (hotels, restaurants and catering services, tour operators, tour guides, etc.), regardless of the fact if the eligible businesses were involved in sustainable tourism activities or not.

Yet, the pandemic has raised pending, previously neglected issues regarding green economy and digital transformation, not only in the context of pandemic recovery, but also in terms of climate change adaptation and tourism product enhancement.

In a recent analysis of the Bulgarian Ministry of Tourism (2021a) it is stressed that during and after the pandemic, environmental policies should serve as a fundament of tourism policy in order to promote eco-innovations in tourism enterprises, support the construction of environmentally friendly infrastructure with reduced energy consumption, and assure

overcoming the low resource management efficiency and climate change adaptation of the Bulgarian tourism industry.

In terms of financial support, in the same document it is emphasised that the slow economic recovery increases the risk aversion and leads to tighter funding conditions for vulnerable businesses, which undermines growth and requires increased public spending for direct business support as well as better focusing of implemented measures on the COVID-19 affected sectors and enterprises. The inclusion of tourism enterprises in the latest version the National Recovery and Resilience Plan (20 July 2021) gives prospects but also poses challenges regarding the efficiency of the provided support and linking it to longer-term sustainability solutions.

In terms of product development and COVID-19 induced changes, it is more than ever necessary to stimulate specialised tourism offers that provide better conditions for physical distancing and nature-based activities, highlight unique features of destinations, and add value to tourist experiences. However, dividing the tourism industry into traditional/conventional (i.e. unsustainable) and alternative (i.e. sustainable) must be avoided, since niche/alternative tourism could not replace conventional tourism. Hence, it should be seen not so much as an alternative, but as a valuable adding to the traditional tourism product of Bulgaria.

4.3.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Considering the above conclusions, both conventional and 'alternative' tourism enterprises should be supported to overcome the consequences of the current pandemic but also persuade sustainable development principles and responsible behaviour. Boosting sustainable tourism for SMEs should be directed towards green technological solutions, digitalisation, and product diversification that require not only new investments but also new skills and expertise of both employees and managers as well as improved partnership and collaboration between the public and the private sector.

Specific recommendations in this regard include:

- Orientation of tourism public policy towards green economy and digital transformation of tourism companies and destinations by setting clear priorities and goals regarding environmentally friendly technologies, digitalisation, and resilience to climate change.
- Upgrading regulations to encourage implementation of digital and green technologies as well as other types of innovation in tourism SMEs.
- Development of financial mechanisms to stimulate transformations towards sustainable tourism in compliance with the requirements of the green and circular economy, e.g. providing direct financial support for investments in green / digital infrastructure and relevant skills.
- Awareness raising campaigns to promote the principles and advantages of green, digital, and circular economy among tourism SMEs as well as funding possibilities to start the transformation process.

- Encouraging public-private partnerships and collaboration of SMEs with research and education institutions to support knowledge sharing, innovation, and responsible business management.
- Providing support for jobseekers to acquire new skills for the development of new tourism products and services that meet the principles of green, digital, and circular economy.

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4.4 Czech Republic

Miroslav Roncak
(As of September 2021)

Tourism is an important sector in the economy of the Czech Republic. As many as 238,000 people were employed in the tourism industry in 2019 (Ministry for Regional Development, 2020). Tourism provided greater prosperity and economic growth. The COVID-19 pandemic has completely changed the positive development of tourism in the Czech Republic. Despite the large number of national economic incentives and intensive regional campaigns, which have helped maintain employment and support domestic tourism so far, the results indicate that the COVID-19 pandemic has had a profound negative effect on the tourism industry in the country. The number of foreign tourists arriving in the Czech Republic has fallen dramatically. Many entities in the hotel and restaurant industry have shut down or struggle to survive. A rising unemployment level is expected in coming years. Although the Czech Republic is ranked 8th globally in the achievement of the 17 UN Sustainable Development Goals (Sustainable Development Report, 2020), sustainability and CSR has not been adequately implemented yet in the tourism sector.

In recent years, tourism growth was not economically, socially and environmentally balanced. Until the beginning of the pandemic, the capital of the Czech Republic, Prague had experienced huge problems with overtourism, including overcrowding in the city centre, beer tourism and Airbnb (Roncak, 2019; Kadar, 2018). Furthermore, the negative effects of tourism were visible in the South Bohemian town *Český Krumlov* and at some natural sites. "Natural Wenceslas Square" is a catchphrase used in the Czech Republic, which refers to natural areas with too many tourists in one place. The name derived from Wenceslas Square, one of the most frequented streets in Prague. The capital city and the Czech regions tried to resolve this negative impact on tourism. Prague attempted to promote less-known pedestrian trails to redirect visitors to other neighbourhoods and away from the overcrowded Royal Way. Furthermore, Prague launched an educative campaign similar to the one used by Amsterdam&Partners to target offensive behaviour of tourists in the city. *Český Krumlov* imposed a fee on incoming busses. Most of these actions did not bring a major change in the combat against overtourism. Paradoxically, it was the COVID-19 pandemic that allowed a walk-through Prague without a crowd of tourists. Regarding to changes in consumer travel preferences, this seems to be a unique opportunity to restart tourism in a more sustainable way.

4.4.1 Political framework for Sustainable Tourism

4.4.1.1 National Sustainable Tourism Policies and Strategies

"**CzechTourism** and **Destination Czech Republic 2021–2025 Strategy**" of December 2020 addresses the term sustainability (CzechTourism, 2020). Although it is not highlighted in the context of the four pillars of the tourism product range, one part of the strategy notes that the Czech Republic is supposed to be a destination with centres of sustainable tourism in all of its

regions. The strategy focuses primarily on managing regional dispersion of tourists, prolonging the season or promoting sustainable ways of travel. The assessment indicators define the number of certified rural tourism establishments and the number of destinations that actively monitor the impacts of tourism on the environment and on local communities. However, the issue of destination long-term sustainability is much more complex. Any others of the UN Sustainable Development Goals are not included; a major problem is also their implementation.

A lack of understaning of the complexity of sustainable destination development is evident by the interview with František Reismüller, Director of Foreign Offices and B2B Relations of CzechTourism published as part of the ETC Handbook 2020 with the title "COVID-19 Recovery Strategies for National Tourism Organisations". He only refers to "a new strategy for tourism in the country that aimed to disperse visitors beyond a small number of locations" (European Travel Commission, 2020). For more than 20 years CzechTourism has been trying to attract tourists to Czech regions, yet the share of arrivals in Prague is the highest of European capitals and equals 62 percent (Prague City Tourism, 2020). In the interview it was highlighted that *"some of the overtourism problems we have known, in particular by taking action to improve regional tourism infrastructure, are rethinking the way the Czech Republic is promoted outside the country".* According to Mr Reismüller all of the measures should lead to "a more economically sustainable form of tourism across the entire country" (European Travel Commission, 2020). Thus, the economic factor is the only factor to be considered. Unfortunately, the socio-cultural and environmental impacts of tourism on destination development are not addressed.

The unpreparedness of the Czech Republic to changes in consumer travel preferences towards an increased request for tomore sustainable tourism is evident not only with regard to the 49th position of the capital Prague of the 50 destinations assessed by the Global Destination Sustainability Index 2019, but also concerning the low number of certified businesses within the global Green Travel Maps or the missing GSTC certification. Prague was criticised especially for the absence of a sustainability strategy concerning the Destination Management Company (DMC), missing DMC certification as well as the non-existence of reports on sustainability performance (Global destination sustainability movement, 2019).

The "Travel Green Europe App", which provides responsible travellers with live listings of sustainable tourism certified products, services and destinations around the world, registers only 10 green certified businesses in the Czech Republic. Compared with some of the local competitors in the area of tourism (for example Austria that counts 513 locations in the Travel Green Europe App or Germany with 1,423 locations), the Czech Republic is not competitive in terms of sustainable tourism development (Tourism 2030 DestiNet services, 2021). Contrary to other countries, which carried out online courses for businesses and regional DMO focusing on sustainability tourism practices, the Czech Republic failed to implement any action in this respect in 2020. According to the Travel & Tourism Competitiveness Index 2019 the Czech Republic was ranked 38th of the 140 countries involved, far behind relevant competitive destinations: Germany (3rd) and Austria (11th). Yet the Czech Republic was ahead of other countries of the former Eastern Bloc: Poland (42nd) and Hungary (48th) (World Economic

Forum, 2019). Given the post-COVID changing consumer travel behaviour and the interest of the generation Z (born after 1995) in more sustainable ways of travel, it is expected that countries not prepared for a sustainable restart will drop down the ranking. This can be the case of the Czech Republic. Tourists will seek for destinations that are better adapted to the changes in consumer travel behaviour. This is illustrated by the trend in the key incoming market of the Czech Republic – Germany. According to NIT (2019) almost 56% of interviewees were interested in spending their holidays on sustainable principles (NIT, 2019).

There are several documents, which form future sustainable development in the Czech Republic.

The Strategic Framework for Sustainable Development in the Czech Republic

"Czech Republic 2030" is a strategic framework that indicates the direction that the development of Czech Republic and society should take in the decades to come. It should improve the quality of life in the Czech Republic and direct the country towards a sustainable development in terms of social, economic and environmental aspects. Czech Republic 2030 is the result of a process taking place within the Government Council for Sustainable Development and led by the Department and subsequently the Division for Sustainable Development of the Office of Government of the Czech Republic. The Division was created in 2014 as a coordinating body for the sustainable development agenda that is now in the responsibility of the Prime Minister. This significantly contributes to perceiving its importance and facilitates solving problems and topics beyond Ministries. The document preparation began in 2015 and hundreds of experts were involved. The document has been discussed with more than 100 organisations and institutions from the civic, private and academic sectors. Nine expert committees of the Government Council for Sustainable Development provided major support in this process.

Czech Republic 2030 replaces the Strategic Framework for Sustainable Development from 2010 and other conceptual documents in this field. Its preparation has been influenced by the adoption of the Agenda 2030 for Sustainable Development and its 17 Sustainable Development Objectives created by the United Nations in September 2015 as well as the adoption of the Paris Agreement under the United Nations Framework Convention on Climate Change. Czech Republic 2030 serves as a foundation for the assessment of the development of the Czech Republic and its global responsibility. The document forms a basic framework for other strategic documents on national, regional and local levels. It cannot replace sector documents and it does not aspire to do so. With regard to these documents, it indicates areas that are decisive in terms of long-term development of the Czech Republic. Specific steps leading to the fulfilment of its objectives fall under the corresponding Ministries and the Office of the Government of the Czech Republic. It is desirable that fulfilling the objectives set out in Czech Republic 2030 will also be reflected in regional and local policies and everyday life of all citizens. The strategic framework is not only designed for public administration; all citizens, companies, social partners and not-for-profit organisations are invited and encouraged to actively participate to fulfil its objectives.

Czech Republic 2030 connects two major concepts – quality of life and sustainable development. Quality of life cannot be measured exclusively by economic indicators; on the contrary, evaluating it requires monitoring of other aspects of human life as well, such as health, balance between work life and personal life, education and skills, interpersonal relationships, civic engagement, environment quality, personal safety, and subjectively perceived life happiness. As well sustainability must be monitored and evaluated also in terms of resource and energy intensity.

The document formulates six cross-sectional principles of sustainable development and indicates how to apply them in the creation of public policies. Czech Republic 2030 formulates its objectives across a total of six key areas. **People and society, Economic model, Resilient ecosystems, Municipalities and regions, Global development and Good governance**. Compared to the Strategic Framework for Sustainable Development of the Czech Republic, the topic of governance proved to be an important topic and it has recently been recognised as an autonomous key area. The adoption of Czech Republic 2030 will be followed by an implementation document that shall be linked to further documents indicating specific measures to ensure its fulfilment. The Office of the Government of the Czech Republic shall coordinate this implementation: The Government Council for Sustainable Development and its committees shall have the supporting role of an expert network. The implementation shall also include monitoring of accordance with specific programmes and measures. The set of indicators in Czech Republic 2030 serves to measure the progress in meeting specific objectives and also as a foundation for regular assessment reports processing.

State Environmental Policy (SEP) of the Czech Republic 2030 with a view to 2050

The material "State Environmental Policy of the Czech Republic 2030 with a view to 2050" (hereafter "SEP 2030") was prepared by Government Resolution (UV) No. 1026 of 23 November 2016, with a deadline for submission to the government by 31 December 2020. The new document was approved by the Government of the Czech Republic on 11 January 2021. SEP 2030 formulates goals in the field of environmental protection in the Czech Republic, covers environmental issues in their entirety and sets a strategic direction until 2030 with a view to 2050. SEP takes into account other strategic documents at the national, European and international level, legislative documents, principles of sustainable development and the results of the Evaluation of the State Environmental Policy 2012-2020, as well as the annual evaluation of “Report on the Environment in the Czech Republic”. Predictions of external influences, such as socio-demographic developments, economic developments, global pressures, as well as the impacts of the current COVID-19 viral pandemic, were also taken into account.

The SEP is thematically divided into three areas: **Environment and Health, Climate-neutral and Circular Economy, Nature and Landscape**, and 10 themes (**1.1 Water, 1.2 Air, 1.3 Hazardous Substances, 1.4 Noise and Light Pollution, 1.5 Extraordinary events, 1.6 Settlements, 2.1 Transition to climate neutrality, 2.2 Transition to circular economy, 3.1 Ecologically functional landscape, 3.2 Biodiversity conservation and conservation of natural and landscape values)**. A comprehensive vision for 2050 was formulated for the entire SEP 2030 document and a partial vision for each of the three main areas. The strategic and specific

objectives of the SEP are set until 2030. Measures are proposed for each specific objective, contributing to its achievement. As part of monitoring of the implementation of SEP 2030, indicators and activities implemented by individual responsible authorities (administrators) will be regularly monitored through the Report on the Environment in the Czech Republic and by the new Platform for monitoring the SEP 2030 fulfilment progress, whose members will be administrators and co-administrators of individual specific objectives, members of the Parliament, non-governmental organizations and associations. In 2025, an evaluation of the fulfillment of objectives will be published in the form of a "Medium-Term Evaluation of SEP 2030". The objectives of the SEP will be met through standard measures, examples of which are given for individual strategic objectives. The specific selection and the type of measures will be the subject of valid segment- and sector-specific strategic documents, which must take into account the objectives of the SEP and further elaborate them.

The Urban and Active Mobility Concept for 2021-2030

The Urban and Active Mobility Concept for 2021-2030 (hereinafter the Mobility Concept) was approved by the Czech Government on January 11, 2021, as a strategic document for walking and cycling and as a methodological document for sustainable urban mobility solutions at the local and regional levels. Czech National Cycling Development Strategy for 2013-2020 expired on 31st December 2020).

The Concept addresses the issue of **sustainable urban and active mobility planning (SUMP)** in line with the European Commission's proposals and requirements for urban mobility solutions, and builds on experience with the first-generation SUMPs, previously implemented by towns and cities. The Mobility Concept is basically a methodology for towns and cities to facilitate the development and updating of their SUMPs, which fall under the competencies of local governments. The goal of SUMP, as defined by the European Union, is to help cities develop tools for strategic planning, and change transport behavior towards sustainable modes of transport. This tool helps cities address some of their current problems with air quality, accessibility, mobility, traffic safety, traffic noise, energy efficiency, connectivity of transport system and overall quality of life.

The SUMP development is based on demographic conditions, on national legislation, funding options, exchange of experience, and the awareness level concerning urban mobility and related problems. Understanding purpose is a key precondition to further success. Existing plans often fail to meet minimum quality standards due to a lack of understanding for the concept.

At present, there are severel towns and cities in the Czech Republic that are working on their own SUMPs. With a few exceptions, these towns have less than 50.000 inhabitants, yet pressurized to go through the whole SUMP process in accordance with a current methodology applied in the Czech Republic (which is based on the European one). Mobility plans have been misunderstood in the Czech Republic. Traditional transport planning uses not exactly ideal way to approach SUMPs: General Transport Plans have been renamed to Sustainable Urban Mobility Plans and enhanced public participation is the only innovation. In fact, nothing has

changed and Czech Republic still put prioritiy on transport plans with car traffic. The original purpose of SUMPs has been suppressed.

A SUMP fosters a balanced development of all relevant transport modes, while encouraging a shift towards more sustainable modes. The plan puts forward an integrated set of technical, infrastructure, policy-based, and soft measures to improve performance and cost-effectiveness with regard to the declared goal and specific objectives. It would typically address the following topics: (a) Public transport, (b) Walking and cycling, (c) Intermodality, (d) Urban road safety, (e) Road transport (flowing and stationary), (f) Urban logistics, (g) Mobility management, (h) Intelligent Transport Systems.

Furthermore, the Mobility Concept pays special attention to the connection between **SUMP and Cycling Infrastructure**. Key objectives cover SUMP and cycling infrastructure, communication plan and support of active mobility.

National Tourism Policy of the Czech Republic - 2014-2020 (A new Strategy for tourism development 2021- 2030 and Action Plan 2022-2023 is currently under development)

The analytical part of the Tourism Policy deals, on the one hand, with the internal conditions of the development of tourism in the Czech Republic, and on the other hand, focuses its attention on the external influences that affect the entire system. The introduction devotes space to an analysis of the basic framework within which Czech tourism is developing. This is a European environment that sets the basic patterns of behavior for all the players in tourism. Subsequently, the analysis focuses on the quantitative assessment of trends in the supply and demand of tourism. This is followed by a brief assessment of the external influences of the economic, social, technological and political environments on tourism. The second part of the analysis focuses mainly on performance evaluation of the priorities and measures in the Tourism Policy for the period 2007-2013. In this way the document returns to an analysis and evaluation of internal conditions, focusing on the activities carried out and the processes set for promoting tourism. Individual priorities of the current Tourism Policy are then analyzed in turn. The assessment addresses not only the content focusing on implemented activities, but also the effectiveness of the instruments applied through the national and regional tourism policies, or more precisely, the decision-makers. The analytical part ends with a SWOT analysis evaluating the three core areas of analysis. Firstly, there is an assessment of current trends in the Czech Republic, followed by a detailed analysis of the Tourism Policy in effect up till now, including the decision-makers and policy instruments. Finally, the individual priorities outlined in the current National Tourism Policy are assessed in detail.

The role of the government of the Czech Republic is to create conditions for business development through its sectoral and regional policies. One of these is also the tourism policy, the main aim of which is to increase the competitiveness of the tourism sector and thus contribute to both, maintaining its economic importance on the one hand, and to the development of the labor market by creating new jobs in the tourism sector on the other. Important objectives are to facilitate the preservation of the cultural and natural heritage (socio-cultural and environmental pillar) to which tourism can also significantly contribute. The specific economic and political objectives of the government in relation to the tourism sector

also include the creation of effective tools and support for small and medium-sized enterprises, improvement of tourism infrastructure, and solutions to overcoming structural changes and regional disparities. Overall, it is mainly to increase the competitiveness of the tourism industry. Another significant objective is to reduce the administrative burden on business development in tourism. A prerequisite for effective development of the tourism sector is support for initial and continuing professional education, which leads to increased adaptability of the workforce and improvement in the quality of services provided. The tourism policy in the Czech Republic also involves multilateral support from important stakeholders and tourism activities. This requires having not only a clear idea of how and what the tourism policy can affect, i.e. determining its strategic vision and objectives, but also improving the organization and management of tourism, even at lower levels.

The strategic vision of tourism for the period 2014 - 2020 represents the Czech Republic as a destination:

- With a highly positive international image
- Having high quality and attractive tourist products and programmes
- Offering high quality services from pleasant and knowledgeable service staff
- Offering interesting cultural and historical experiences, sports, appealing natural attractions
- Offering a safe holiday experience for domestic and foreign visitors
- With commonly applied principles of sustainable development in practice
- Offering exciting job opportunities in tourism

Priorities of tourism policy are improving the quality of the tourism supply, tourism management, destination marketing and tourism policy and economic development.

Global objective of the Tourism Policy comprises the following issues:

- Increase the competitiveness of tourism in the Czech Republic within the area and context of Europe
- Maintain the relative economic position of tourism in the national economy (creation of GDP, employment especially in small and medium-sized enterprises)
- Remove or reduce regional disparities, especially in economically weak, problematic regions
- Promote the use of cultural and natural heritage for tourism development, but with guarantees to maintain its quality
- Strengthen the role of tourism in economic and sectoral policies of the state, including the strengthening of monitoring, evaluating and eliminating negative impacts caused by tourism on the natural and socio-cultural environments and on public health

The global objective of the Tourism Policy is to increase the competitiveness of the tourism sector at the national and regional levels and maintain its economic performance as a result of achieving a balance between economic, socio-cultural, environmental and regional development.

In order to increase the competitiveness of the tourism sector, the following strategic objectives of the Tourism Policy should be implemented:

- Enhancing the quality of the tourism supply, including cultivation of the business environment
- Building a structure and cultivating institutions to effectively implement the tourism policy
- Improving the quality of human resources as a key factor in innovation processes
- Improving the access of service providers to tourism markets
- In accordance with the principles of sustainable development, increasing the use of effective tools and innovation in the management and marketing of tourism destinations
- Strengthening the role of tourism in the economic and sectoral policies of the state

The extent to which the global objectives of the Tourism Policy are fulfilled will be monitored through, for example the following indicators: number of nights spent by domestic and foreign visitors, number of people employed in tourism in the Czech Republic or share of foreign exchange earnings from tourism in GDP in %.

According to the tourism policy 2014 – 2020 an attribute of all the proposals is their sustainability. Tourism is, in this sense, a somewhat specific industry. It has a wide range of both positive and negative effects that may, if in breach of the principles of sustainable development, manifest themselves in an uncontrollable and unbalanced way. In terms of socio-cultural and environmental impacts, there is the problem of so-called tourist footprint, i.e. the characteristics of tourism activities degrade their own capital (the attractiveness of the destination for visitors). Sustainability in economic, environmental and social terms has to be the paradigm of all the strategies and activities of the tourism sector.

Strategy of the CzechTourism Agency and Czech Republic Destination for 2021–2025

This document of the CzechTourism Agency serves as well as a strategic guideline for sustainable development assigning the following priorities:

- Stabilization of the sector after the decline caused by the COVID-19 pandemic
- Creation of strategies for development of sustainable forms of tourism in the CR, and development of main products taking into account the specific features of target groups
- Balancing of the unbalanced tourism dispersal in the Czech Republic
- Strengthening of the regions with unused tourism potential, better dispersal of incoming visitors and use of existing capacities
- Promotion of the Czech Republic brand in relation to competitors

The most important pillars of tourism in the Czech Republic include cultural tourism, which plays an essential role for strengthening the Czech Republic brand and provides a strong potential for attracting tourists to regions, reaching distant markets with a low knowledge of the CR, as well as SPA, one of the sectors most affected by the COVID-19 pandemic, with a great potential of development after the pandemic ends (change in travelling preferences,

tourist focus on health care and relaxation, slackening the pace, holiday outside crowds of tourists). Furthermore, the MICE segment is important for tourims, which is as well one of the sectors very much affected by COVID-19 pandemic. It is especially a key product for Prague and big cities, high-income tourists, large potential in terms of accompanying programs and incentives, development of hybrid events. Last but not least the active tourism is to be mentioned as an important pillar for Czech Republic tourism, as it complies with the changes in travelling preferences in regard with the COVID-19 pandemic, focus on holidays outside cities and healthy lifestyle, a positive aspect for regional tourist dispersal.

One of the key topics is the Czech Republic – a destination with sustainable tourism centres in all regions:

- CzechTourism manages the regional dispersal of tourists, assist in preparation of an exclusive offer in each region, develop sustainable forms of travelling.
- CzechTourism digitalizes the tourism offer and make it more effective.
- CzechTourism activities have transformed from adestination marketing to comprehensive destination management of the Czech Republic destination and actively methodically support the transformation of other DMO.
- CzechTourism flexibly reacts to trends in destination marketing. CzechTourism adjusts the marketing mix to the changing target groups of products and effectively measure the results of campaigns and micro-campaigns.
- CzechTourism manages 4 main CR product lines (Cultural, Active, Spas, MICE) and ensure their development and promotion.

Indicators for the evaluation of the destination strategy have been developed. For their measurement the instrument Balanced ScoreCard (BSC) has been used. Main target values for 2025 have been determined: The tourism intensity will grow faster in the regions where the value is lower than the average in the CR in 2019 (in 2019 the following regions were below the average: Zlín, Olomouc, Plzeň, South Moravian, Vysočina, Pardubice, Moravian-Silesian, Ústí nad Labem, and Central Bohemian Regions).The Gini coefficient, monitoring the seasonality in terms of nights spent by foreign tourist in the CR, will not exceed 0.2 (in 2019 it was 0.113 – the best value in comparison with competitors). CAE occupancy rate (net utilization of beds) in the CR, expressed in the annual average, will not decrease below 50% (50.9% in 2019).

COVID-19 Recovery tourism action plan 2020 – 2021

The Czech government has approved in 2020 the **Crisis Action Plan of Tourism** for the Czech Republic 2020-2021. The objective of the Action Plan was to help establish anti-crisis measures that will, in a sustainable and effective way, allow recovery of the tourism sector in the Czech Republic; achieving pre-crisis values and performance on the one hand and minimizing the possible negative effects on Czech regions and Czech operators on the other hand. The Action Plan focuses on the basic steps required for the recovery of the sector both at the end of the crisis and during the subsequent lifting of the measures. Naturally, in some activities these two stages overlaped, especially in the area of financing and supporting employment. The following measures have been identified as crucial in cooperation with relevant professional

associations: a) the reduction of VAT on services; b) increased demand for domestic travel; c) prolongation and modification of the Antivirus program.

Sustainable tourism is one of the pillars of the long-term priority of the Czech Republic. Respective measures – create positive attitudes of residents towards tourism, involvement of residents into decision making procesess in destinations and regarding product development. Such measures will be implemented with help of following activities:

- Support of events for residents (Hotel night, Museum night etc.)
- Promotion campaigns with the aim to increase spendings in tourism
- Conducting research with focus on residents percention of tourism impact
- Key initiative – Domestic tourism support

Strategy of Ministry of Regional Development for support non-state non-profit making organization for 2021 – 2022: Within this strategy there are two important pillars to be mentioned: **Sustainable tourism development** and **sustainable development of regions, cities and counties**. Key partners for sustainable tourism development are the Czech Tourist Club, Foundation for Parnership, Partnership for Urban Mobility and the Czech Mountbike Association (10 mil.CZK/400 000 Euro).

4.4.2 Key Stakeholders

4.4.2.1 Governmental and semi-governmental bodies

Czech Government Council for Sustainable Development (GCSD) (Rada Vlády pro udržitelný rozvoj)

The Government Council for Sustainable Development (the "Council") was established by Government Resolution No 778 of July 30, 2003 as a standing advisory, initiative and coordinating body of the Government of the Czech Republic in the domains of sustainable development and strategic management. The first Statute of the Council was adopted by Government Resolution No 836 of August 6, 2003. In 2006 the Council and its secretariat was moved to the Ministry of the Environment of the Czech Republic. The Council and its horizontal, inter-sectoral importance were fully re-established and the Council was moved back to the Government's Office (Department of Sustainable Development of the Office of the Government) by Government Resolution No. 434 of June 9, 2014. The GSCD serves as the main body for inter-sectoral coordination of: the relevant policies among central administrative authorities; development of the strategic framework 'Czech Republic 2030' and its reviews; the Sustainable Development Goals (SDGs) implementation; biannual reporting on the implementation of the sustainable development strategy in the Czech Republic and monitoring of indicators; methodological coordination of conceptual documents.

Ministry for Regional Development (Ministerstvo pro místní rozvoj)

The Ministry is the methodological and coordination body for all entities operating in the tourism industry. The State Tourism Policy Concept in the Czech Republic for the period of 2014 – 2020 is a mid-term strategic document, which is first and foremost based on tourism development potential in the Czech Republic, and is an indispensable instrument for the Ministry's work in this field. Strategy for tourism development 2021 – 2030 is at the moment in

proces of approval. One of the Ministry's key goals in tourism is to employ a legislative instrument to establish better conditions for tourism development in the Czech Republic. By presenting clear rules, the Ministry intends to improve consumer protection and set forth rules for the operation of tour operators and travel agencies. The Ministry is engaged in the activities of international tourism organisations; the outcomes are presented at international conferences and trade fairs. Through CzechTourism, the Czech tourism authority, the Ministry presents the Czech Republic as an interesting tourist destination both abroad and on the domestic market. The Ministry is carrying out a number of projects financed from EU structural funds which will contribute to the development of tourism in the Czech Republic. Ministry of Regional Development is also co- coordinator (together with Partnership for Urban Mobility) of the project Partnership for Urban Mobility.

Czech Tourist Board – CzechTourism (Česká centrála cestovního ruchu – CzechTourism)
The National tourism board is a client-oriented agency whose goal is to effectively support inbound and domestic tourism, and to actively contribute to creation of a positive image of the Czech Republic abroad. CzechTourism carried out several projects, for example Czech Service Quality systém, DMO certification and Rural tourism and agritourism quality certification.

Ministry of Environment (Ministerstvo životního prostředí)
Ministry of Environment is the central state administrative authority and supreme inspection authority in environmental affairs. Ministry is coordinator of State Environmetal Policy (SEP) of the Czech Republic 2030 with outlook to 2050. SEP 2030 formulates goals in the field of environmental protection in the Czech Republic, covers environmental issues in their entirety and sets a strategic direction until 2030 with a view to 2050. Concerning to sustainable tourism it cover issue of natural heritage protection.

Ministry of Industry and Trade (Ministerstvo průmyslu a obchodu)
The Ministry of Industry and Trade is the most important institutional actor to support SMEs. There are no particular programmes for SME that support the implementation of sustainable principles. But the Ministry provided a so called COVID – 19 Economic stimulus packages to support tourism in the Czech Republic. It provides, for example the following measures: The COVID-Tourism Subsidy program, Antivirus (contribute to employer`s salaries) or Coronavirus compensation bonus. All these programs should help tourism sector to recover ater COVID – 19 pandemics. There is a tendency that foreign representation offices of CzechTourism agency will be part of this Ministry in the future.

Ministry of Culture (Ministerstvo kultury)
Ministry of Culture is directly responsible for protection and cultivation of tangible and intangible culture heritage of the Czech Republic.

Ministry of Transport (Ministerstvo dopravy)
Ministry of Transport is the main body responsible for transport development in the Czech Republic. Ministry is one of the coordinator of Urban and Active mobility conceprt 2021 – 2030. This is a methodological document for sustainable urban mobility.

Ministry of Agriculture (Ministerstvo zemědělství)

The Ministry of Agriculture is the central body of the State administration of agriculture, water management, the food industry and forest management, hunting and fishing outside the National Parks. It supports and ensures the development of organic production in the Czech Republic. It is the guarantor of compliance with the rules on organic production, and at the same time it coordinates financial support for organic farmers within the framework of national subsidies and the Rural Development Programme. It also actively participates in support for marketing, education and training. The Ministry of Agriculture's priorities are protection against floods and drought and support for the development of the water supply and sewerage systems. Water flows are taken care by means of the stateowned enterprises, Vltava River Board, Elbe River Board, Morava River Board, Odra River Board, Ohře River Board and Lesy ČR (Forests of the Czech Republic). The Ministry supports the cleaning of ponds, and provides the main supervision in the field of water supply and sewerage systems for public use with regard to protecting consumers and the long-term sustainability of the sector. It takes care of forests and promotes healthy and high quality domestic products. Ministry of Agriculture carried out several projects concerning to sustainable tourism with focus on sustainable tourism and social responsibility, for example Czech Food product, regional food product and Meet your farmer.

Nature conservation agency of the Czech Republic (Agentura ochrany přírody a krajiny)

Nature conservation agency of the Czech Republic is a governmental body providing nature conservation and landscape protection at the national level; it manages Protected Landscape Areas (PLA), National Nature Reserves (NNR) and National Nature Monuments (NNM) and deals with expertises and other expert/technical activities in nature conservation and landscape protection.

Trade and tourism Union (Svaz obchodu a cestovního ruchu)

Trade and Tourism Union is leading body which represents employees in Trade, Tourism and Service sector. It represents interests of their members, monitors legislative changes and asses economic risks. Implication of sustainable principles for SMEs are discussed in working group for sustainability.

4.4.2.2 Tourism Associations

Czech Tourist Union (Česká Unie cestovního ruchu)

Czech Tourist Union is a professionally oriented organization of employers in tourism that represents members from hotels and restaurants, tour operators, cableways and ski lifts, rural tourism and agritourism and spas. It covers 16 professional tourism associations with 7780 entities. Their project with title "Support of long-term sustainable development on the national level through the tourism supplier" was approved by Ministry of Regional Development in 2018. One specific activitity of the project is the education of tourism professionals in the field of sustainable tourism development. It consisted of four training programs: Social media basic, social media advance course, LinkedIn and Twitter and labor-law relationship.

The Czech Association of Hotels and Restaurants (Asociace hotelů a restaurací České republiky)

The Czech Association of Hotels and Restaurants z.s. (hereinafter referred to as AHR CR) was established in the year 2006 through a merger of the vocational associations HO.RE.KA (hospitality industry association which specified hotel quality classification) and National Federation of Hotels and Restaurants. It is a civil association, a professional and non-political organization. AHR CR brings together the owners and operators of hotels, boarding-houses, restaurants, vocational schools, but also partners offering various products for the accommodation or restaurant operations. It consists of 1788 members. AHR CR carried out several projects concerning to sustainable tourism, for example promotion of corporate social responsibility in hospitality industry, annual award of responsible hotel/restaurant or night of the hotels. The last project is a corporate social responsibility event, which is not only to point out the economic benefits of tourism for the residents, but also to present the hospitality industry to the residents more illustratively.

Association of Tourist Information Centres of the Czech Republic (Asociace informačních center České republiky)

The Association of Tourist Information Centres of the Czech Republic (ATIC CR) is a non-profit union of legal and physical persons. It is a voluntary professional organization of tourist information centres established to represent and promote their interests at the state-level politics. ATIC CR is a partner to the state institutions and relevant professional organizations in the tourist industry. ATIC CR provides certification and classification of the tourist information centres in the Czech Republic. The classification and certification is set up in such way that each Tourist Information Centre is assessed according to the range and extent of provided services.

Czech Tourists Club (Klub českých turistů)

The Czech Tourist Club (Klub českých turistů, KČT) is maintaining and marking all hiking trails. The club also coordinates the bike and skiing trails across the country. The club is divided into 14 different branches, corresponding to the different Czech regions. In addition to this, the Czech Tourist Club publishes series of maps of the Czech hiking trails. Czech Tourist Club is one of the coordinators of the Czech Service quality systém.

Rural Tourism and Agritourism Association (Svaz venkovské turistiky)

The Rural Tourism and Agritourism Association is a voluntary, non-politic associtation, which represents interests of entrepreneurs in rural tourism and agritourism. Association is trying to promote rural tourism and holiday on land. In addition, it is starting process quality certification of entities in rural tourism and agritourism.

4.4.2.3 NGOs, Sustainable Tourism Networks and Partnerships

Czech Union for nature conservation (Český svaz ochránců přírody)

Czech Union for nature conservation is a society with members who are interested in nature protection, environmental education and support of nature heritage. The range of activities is very broad. Czech Union for nature conservation manages valuable natural sites, conduct field research and surveys, strive to preserve the richness of plant and animal life in the Czech Republic, work with children and youth as well as with the general public.

Foundation for partnership (Nadace partnerství – Partnerství o.p.s)

The Foundation for partnership is the biggest Czech environmental foundation, which has been creating partnerships for nature for 30 years. The Foundation financially supports communities and individuals, educates and helps people to take over responsibility and care of the environment. The Foundation looks for smart and fresh solutions to the drought and the climate crisis and tries to prepare the Czech landcape and cities to be healthy. It carried out several successful projects, for example supported the development of Czech Greenways and cycling pathways, initiated the „Bike to work“ project or certification of entitiques for cyclists „cyclists welcome“.

Partnership for Urban mobility (Partnerství pro městskou mobilitu)

Partnership for Urban Mobility is a nationwide, voluntary, non-political and non-governmental organization founded as an NGO association. Association members are towns and cities as well as NGOs, clubs, associations, unions and initiatives. The Partnership for Urban Mobility will strive to participate as an active partner in the development of the new national Urban and Active Mobility Concept, in close cooperation with many others, such as ministries, the Faculty of Transportation Sciences of the Czech Technical University Prague, the University of Economics Prague, the Faculty of Transport Engineering of the University of Pardubice, the Faculty of Social and Economic Studies of Jan Evangelista Purkyne University in Usti nad Labem, VSB - Technical University of Ostrava, Palacky University Olomouc, Czech Smart City Cluster, Union of Towns and Municipalities of the CR, etc. The association is a partner for government and parliamentary political representation in the Czech Republic. It takes part in the preparation and drafting of legislative and non-legislative measures relating to the area of urban mobility, especially cycling. The Partnership for Urban Mobility aims to implement one of 14 projects of the Urban Agenda for the EU, namely the Partnership for Urban Mobility project, in the Czech and Slovak context. It has been transformed from the Czech Association of Cities for Cyclists, which was established in 2013. The aim is to change the way of viewing mobility in Czech towns and cities and to overcome barriers that hinder elaboration and implementation of mobility plans in the Czech Republic.

Their goals include:

- Participate actively on the implementation of the Urban and Active Mobility Concept 2021-2030
- Provide professionals with a methodological background, especially through webinars, workshops, discussions and conferences, for supporting urban and active mobility; Be an administrator of the Urban Mobility Academy website; Urban transport and mobility are very complex issues. Important topics in the integrated urban development, such as sustainable development, climate change in urban areas, reducing barriers, innovative mobility solutions, or a human-oriented social city concept, relate to many disciplines and sectors, and require the engagement of various stakeholders and network structures
- Help to change a cycling culture a to build safety cycling network

Their tasks involve the follwing ones:

- Support the development of new cycleways

- Help deliver safe cycling network for everyday journeys
- Monitor what the towns and regions plan in the field of cycling infrastructure development
- A map for designing safe measures for cyclists will be created
- Deliver in cooperation with towns and regions a safe network for cyclists

The visions of the association are mainly connected wit two key projects, running from 1st July 2020 to 31st December 2022. The first one, Danube Cycle Plans, is dealing with policies, plans and promotion of cycling in the Danube region. The aim of the second project – SABRINA (Safer Bicycle Routes in Danube Area) is monitoring the EuroVelo Routes, summarizing good practice, designing a strategic plan for EuroVelo and cooperation on training and educational activities.

I am not a pig (Nejsem prase)
A civil association initiative of young people, which focuses on responsible tourist´s behaviour and nature protection. The aim is to cleanup Czech Republic and educate people/tourists to more environmentally friendly behaviour in nature.

Keep it clean
Keep it clean is civil association initiative, which focuses on responsible tourist´s behaviour and nature protection. The aim is to clean up Czech Republic and educate people/tourists to more environmentally friendly behaviour in nature.

Cleanup Czech Republic (Ukliďme Česko)
"Cleanup" is a civil initiative that focuses on responsible tourist´s behaviour and nature protection. The aim is to cleanup Czech Republic and educate people/tourists to more environmentally friendly behaviour in the nature.

4.4.2.4 Relevant research and educational bodies

Palacky University Olomouc, Department of Recreation and Leisure studies
Palacy University conducts research in the fields of sustainable tourism development, resident's attitude towards tourism, impact of tourism on the resident s quality of life and overtourism. Besides, they offer teaching classes on sustainable tourism, which is held in Czeck and English. One of their key projects is "Sustainabe Palacky" which is concerned with Palacky University as CSR organization with their own coordinator of sustainability.

4.4.2.5 Individual tourism business and destinations of particular relevance

There is not destination in the Czech Republic, which is certified as "Green destination" according to GSTC criteria. Perhaps the first positive sign seems to be the capital Prague. Given the sustainable recovery at the beginning of September 2020, Prague approved a new tourism strategy that should change and restart tourism. The new strategy of sustainable tourism development should minimize negative economic, social and environmental impacts, contribute to the conservation of culture heritage and generate greater economic benefits for local people.

Hradecko region is positioning themselve as a first socially responsible destination in the Czech Republic. They created a new website that is divided into several sections with emphasis on implementation of sustainable principles and responsible travel behaviour.

The following destinations in the Czech Republic have been awarded for their promotion of sustainable practices as a European Destination of Excellence (EDEN)

Zlin and Luhacovice Region (Zlínsko a Luhačovicko) – 2019

Focus: Health as well-being tourism

High-level wellness, spas and healing therapies based on the natural heritage of springs. The architecture of Dušan Samo Jurkovič's unique architecture makes the town of Luhačovice feel like a fairy tale tucked away in lush forests. This is the ideal place for anyone looking for a sustainable holiday, away from other overloaded tourist destinations.

Eagle Mountains and Foothills (Orlicko, Zámky na Orlici) - 2017

Focus: Unique culture tourism product

The project 'Chateaux on the Orlice River' is one of the best touristic offers in the region, and it combines historical monuments and the authentic traditions of noble families in a beautiful foothill landscape. Based on long-term projects, the DMO Eagle Mountains and Foothills (Orlické hory a Podorlicko) platform cooperates with service providers, authorities, businesses and the non-profit sector in the Eagle Mountains and Foothills region to promote **sustainable tourism**.

Jeseníky Mountains – 2015

Focus**:** Tourism and local gastronomy

The region of Jeseniky, in the middle of Czech Sudetenland, offers visitors an almost unlimited range of tourism activities with its high quality natural environment and beautiful landscapes. The mountains in Jeseníky are one of the Czech Republic's top destinations, and they offer ideal conditions for an active winter holiday. Gastronomy in the Jeseniky region is built on three essential pillars: **Tradition and history** - original recipes are often based on the cuisine of the Silesian region, **Regional products** - a network of suppliers provide local products to customers and **Quality and seasonal ingredients** - local producers and suppliers are always on the search for new sources of local products.

Lipno – 2012/2013

Focus: Accessible tourism

The **Lipno without barriers** project proposes programmes for disabled people and makes many tourist activities in the area accessible for them. For example, tandem bikes or hand bikes enable disabled people to enjoy the cycling routes through the beautiful natural setting of Sumava.

Slovácko region, Bata waterway - 2011

Focus: Tourism and Regeneration of Physical Sites

The authentic region of Slovacko region is situated in the south-east of the Czech Republic, bordering Slovakia and Austria. The geographical location and impressive historical heritage make this region a truly fascinating destination. The mild climate, mountains, lush forests and rivers give Slovacko its unique ambience. The vast culture and tradition of the region is visible

in the everyday lives of the locals. For example, the old buildings with their white-washed walls and colourful flower ornaments around the windows have been well preserved. There is also a wide variety of gourmet specialities on offer, using traditional recipes that have been passed on from one generation to the next.

Regeneration and revival

In recent years, local authorities have carried out several regeneration projects to harness the incredible tourism potential of Slovacko. One of the most remarkable projects is the Bata Canal, a 65km historical waterway offering an unconventional way to explore the region. Previously, the canal was used to transport coal to a power station in Otrokovice. Other testaments of the local industrial history, such as windmills, watermills and the distillery, have also been renovated.

Bystřicko region – 2010

Focus: Aquatic tourism

Bystricko region is part of the Czech Moravian Highlands and is comprised of 34 towns and villages with around 20,000 inhabitants. It is located in the northeastern tip of the Czech Moravian Highlands, known for their exceptional rough beauty, their abundance of rivers, creeks and dams, and unique flora and fauna. Bystricko region is the perfect destination for an unforgettable holiday, especially for those looking to combine peaceful rivers and lakes with something more active. Rowing, swimming, fishing and other water-related activities are likely to guarantee exciting experience from tourist`s holiday.

Bohemian Switzerland (*České Švýcarsko*) – 2009

Focus: Tourism and Protected Areas

Bohemian Switzerland, also known as Czech Switzerland, is a protected area in the northwestern part of the Czech Republic. With a multitude of great natural beauty it attracts tourists from all over the world. A few that leap out immediately though are the Tiske Steny (rock towers and rock city), Edmundova Gorge and Pravcice Gate (largest sandstone rock gate in Europe). There's also the amazing Canyon Elbe by Hrensko, which is the place with the lowest altitude in the Czech Republic. In the heart of the park, surrounded by everlasting natural beauty lie some of the oldest churches, chapels and relics in the Czech Republic. In an area called Ceske Kamenice are two that stand out: the Church of St James and the pilgrimage chapel of the Blessed Virgin Mary.

For those interested in Bohemian culture, there are a number of folkloric monuments, windmills and historical villages. The House of Bohemian Switzerland - a visitor and educational center in Krasna Lipa - is a great place to learn about Bohemian crafts such as textiles and glassmaking. As is, the case with any high-altitude nature region, the weather plays its part. One of the key goals of the park is to promote tourism throughout the year, giving visitors a true sense of how the landscapes change with the seasons. There are offers designed especially for the 'low season' and activities are plentiful even during bad weather. There is a focus on keeping the park as green as possible. Modern economical bus lines take visitors to designated entrance points, while car parks have been built to keep traffic out of the park's untainted soils.

4.4.3 Activities and instruments for the development of sustainable tourism

4.4.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Domestic tourism campaign

During the first stage of the pandemic, the Ministry of Industry and Trade of the Czech Republic announced a series of measures to support domestic tourism. Similarly, the state agency CzechTourism announced a campaign called **"#světovéČesko"** to support domestic tourism. The ambassadors in the campaign were renowned personalities, including famous Czech icehockey player Jaromír Jágr. The aim of the campaign was to raise interest in traveling in the Czech Republic, with focus on less visited locations, and prolong the season until October. The campaign was joined by Czech regions and entrepreneurs.

Projects of the Czech Association of Hotels and Restaurants

Night of the hotels

The project organizer is the Czech Association of Hotels and Restaurants proceeding in synergy with Prague City Tourism and Prague City Hall. The event is taking place in Prague and some other cities in the Czech Republic on a regular basis. It is a Corporate Social Responsibility CSR event supported by hoteliers, the objective of which is not only to point out the economic benefits of tourism for the citizens, but also to present the hospitality area to the residents more illustratively. Hotels offer their services to the participants and prepare an ancillary program for them. A symbolic price for a double room has been set at CZK 777 (30 Euro), CZK 999 (40 Euro) or CZK 1.111 (45 Euro) including breakfast, VAT and additional charges. The price is the same for all facilities. Booking is performed directly via Night of hotel websites.

A start to life

The Foundation of the Czech Association of Hotels and Restaurants supports the development of children from children´s homes with a particular focus on their educational activities. For this purpose, the "A Start to Life" project was developed within the Foundation to provide assistance to these children during their studies at tourism, hospitality and gastronomy-oriented schools. The aim of such support is to provide the children with a possibility to get educated and to seek practical experience inside the industry at the same time in order to maximally facilitate their subsequent starts into the real life once their studies have finished. An integral part of the Foundation´s activities is represented also by the financial backing provided to the selected activities pursued by the children´s homes aimed at improving the environments and the conditions of stay for their young clients (structural adjustments and renovations of the premises, etc.).

Corporate social responsibility

CSR is an approach to entrepreneurship that corresponds with, or even exceeds, the framework of ethical, legislative, commercial and social expectations. Responsible business comprises a range of topics that are always specific to the particular sector in which the company operates. Responsibility in hospitality and gastronomy is a way for hotels and restaurants to possibly move closer towards sustainability, not just environmentally and socially, but also economically, through a set of relatively simple measures. Responsible

approaches to business does not mean just charity or “extra costs”, but also a sustainable entrepreneurial attitude. Social responsibility of hotels and restaurants will cover such topics as ethics in selecting suppliers, energy and water consumption, waste management, facility management, facility operations, cleaning and maintenance, cleanliness, staff and customer engagement, products and services portfolios, support to local communities and public spaces, attitudes displayed by staff and clients to people with a handicap, etc. AHR CR has developed a material presenting a collection of the best practices, which can be used as a guideline to follow and will also make the navigation of CSR easier.

Projects of Foundation for partnership

Czech Greenways and Cycling pathways

Foundation for partnership initiated the development of the Czech Greenways and cycling pathways

Bike to Work

The project’s goal is to motivate as many people as possible to learn to use a bike as a regular urban means of transportation (alternatively to walk or run). If more people switch from cars to bikes and other non-motorised vehicles, they will not only improve their physical condition, mood and work relationships but they will also jointly contribute to cleaner air and more pleasant, safer and healthier cities where they live and work. Bike to Work is a team competition for companies and institutions. Anyone, who can make a team of at least 2 and maximum of 5 members and regularly bike to work with their co-workers in May, can join the competition. Runners, walkers, skaters, skateboarders, long boarders and wheelchair users also can join this competition.

Projects of Partnership for Urban Mobility

City Changers

The campaign is intended to help local initiatives and people interested in revitalizing the region, the city. Every City Changers project aims to make public space a liveable and living place through construction improvements and social activities. All ideas and decisions must be made in close cooperation with a municipal forum, consisting of residents, with help from the City Changers campaign team. Financial assistance is not a key element in this case but could be important. The aim is a marketing assistance spreading the campaign among citizens and local authorities.

Projects of the Ministry of Agriculture and the Rural Tourism and Agritourism Association

Meet your farmer

The direct sale of good-quality agricultural products to the consumer is supported by the Ministry in the form of the “Meet Your Farmer project”. The aim is to introduce the public to a farmer (hence the name “Meet Your Farmer”) who lives close to their place of residence and to show them where to buy fresh food directly from the producer. This improves communication between farmers and their potential customers. Thanks to this project, the general public gains the opportunity to buy absolutely fresh food at prices that come directly from the producer. An open gate day is held annually in all regions of the Czech Republic, always at several smaller farms involved in food production. Throughout the day visitors have the opportunity to get acquainted with the products on offer as well as to see for themselves

how they are produced. Other similar farms from the surroundings are also present at the event. Children can look forward to an entertaining programme on farming and healthy eating at the farms.

Rural tourism holiday

The aim of this project is to promote rural tourism and holiday on land.

Projects that support responsible tourist´s behaviour and nature protection

There are several projects that support responsible tourist´s behaviour and nature protection, for example I am not a pig (Nejsem prase), Keep it clean and Cleanup Czech Republic (Uklidme Česko). The aim of these projects is to cleanup Czech Republic and educate people/tourists to more environmentally friendly behaviour in nature.

4.4.3.2 Marketing and information services supporting sustainability in tourism

Marketing Information system – National Tourism Board CzechTourism

Marketing information system of the Czech Tourist Authority is dealing mainly with monitoring, analysis and implementation of data. This can help DMO and SME with a better management of the destination, coordination of flow management and market targeting (www.Tourdata.cz).

Website Kudy z Nudy (How to escape out of boredom) - Promotion of domestic tourism

This is the most important website for promotion domestic tourism. It offer various option for spending wonderful holiday including a few tips for sustainable travel in the Czech Republic

There are several educational infos concerning environmentally friendly behavior in nature on social media of following iInitiatives - I am not a pig, Keep it clean, Cleanup Czech Republic and on the website of Ministry of Environment (www.mzp.cz) and Nature conservation agency of the Czech Republic (www.ochranaprirody.cz).

The most comprehensive book concerning to social responsible tourism is from Pásková, M., & Zelenka, J. (2018). Společensky odpovědný cestovní ruch (Social Responsible Tourism). *IDEA Servis, Prague, Czech Republic*.

4.4.3.3 Tourism Sustainability Certification Systems and Awards

There are very few sustainability certifications systems and awards in the Czech Republic concerning sustainable tourism. Certifications are mostly focusing on the quality of the provided services. Good examples of projects with a sustainable tourism focus are the rural tourism and agritourism certifications as well as the EDEN award**.**

Certificates putting an emphasis on the quality of the provided services are described as followos:

Czech service quality system (*Národní system kvality*)

The **Quality service certification** focuses on general improvement of the quality in the tourism sector throughout the Czech Republic.

The aim of the project **CzechTourism DMO certification and classification** is to improve quality and efficiency of DMO`s activities in the area of destination management. DMO`s certfication

determines requisite requirements for DMO´s operations. It is mandatory for all DMO`s which would like to receive financial support from the Ministry of Regional Development.

Rural tourism and Agritourism certification – Gold, silver, bronz

CzechTourism and the Rural tourism and agritourism association are providing a quality certification of rural tourism entities. All rural tourism and agritourism entities are assessed according to the range and extend of the provided services and must meet specific criteria. According to the quality of their services they are divided into three categories: Gold, silver and bronz.

Project of the ATIC CR

In April 2011 the Council of Members of ATIC CR held in Holešov approved the new system of certification and classification of the tourist information centres in the Czech Republic. The classification and certification have been set up in such a way that each Tourist Information Centre (TIC) is assessed according to the range and extent of their services provided. According to this system the TICs have been divided into 3 categories: A, B, C. The criteria include: The range and relevance of the provided information, the operation of the electronic database, technical facilities, wheelchair access, provision of the public Internet, opening hours of the TIC, language skills of the TIC staff, the level of their education and relevant practical experience, etc. To become a member of ATIC CR the TIC must comply with the requirements of the valid certification.

Project of the Czech Association of Hotels and Restaurants

The **Czech Association of Hotels and Restaurants Awards** are presented annually in terms of the last Annual Conference evening. This evaluation is an expression of recognition of those association members who, by achieving their performances in their professional lives and by performing their social activities, set an example for others to follow. The AHR CR Annual Awards are conferred in the following categories:

- Hotelier of the Year - hotels to 80 rooms
- Hotelier of the Year - hotel chains and hotes over 80 rooms
- Restaurateur of the Year for independent restaurants
- Restaurateur of the Year for hotel restaurants
- Boarding-house of the Year
- School of the Year
- Young Manager of the Year
- Responsible Hotel / Restaurant

However, the AHR CR also annually bestows a so-called Special AwardBest Student and Thesis in the tourism area.

Projects of Foundation for partnership

Certification **„Cyclists welcome“**: This certification´s aim is to improve the quality of entitiques for cyclists. To obtain certification „Cyclists welcome“ the entity must meet specific criteria. Accommodation, restaurants, camping sites and tourist destinations for cyclists indicate a smiling bike in sign of the certification Cyclists welcome.

The **Adapterra Awards** are looking for functioning adaptation measures that help Czech Republic adapt to climate change. The best practice examples get into the Adapterra database, which inspires experts and the general public.

The **Josef Vavrousek Environmental Award** aims to honour people and entities which help to protect our environment and sustainable development.

Projects of Partnership for Urban Mobility

The Vít Branda Award

The Vít Branda Award aims to appreciate exceptional transport constructions which make the public space more attractive emphasising the need of creating public and street space with regard to the promotion of active mobility, environmental protection and safety of vulnarable users.

Projects of Ministry of Agriculture

Czech Food Product

Labelling products as "Czech Food Product" or "produced in the Czech Republic" is voluntary, but, according to the law, it can only be used either if 100% of all constituents of the total weight of unprocessed food, wine products or milk come from the Czech Republic and primary production, the slaughter of animals and all stages of production took place in the territory of the Czech Republic, or if the sum of the weight of the constituents originating in the Czech Republic is at least 75% of the total weight and production took place in the territory of the Czech Republic.

Regional Food Product

The Czech Republic also focuses on promoting and supporting quality regional food products through the "Regional Food Product" brand. This project was created in early 2010 and is organised by the Ministry of Agriculture in cooperation with individual regions and the Agrarian and Food Chamber of the Czech Republic. The project caters to the public interest in domestic quality food. The Regional Food Product brand may be received by the highest quality products from each region that excel in quality, are made from local raw materials, have a traditional recipe and excellent taste. The project supports domestic producers of local food and motivates customers to look for such products on shop shelves, at farmers' markets and directly from manufacturers. This provides a great opportunity for local producers to raise the visibility of traditional specialities, at the same time it is also a form of support for local farmers, food manufacturers and tourism. Consumers can currently choose from 520 products awarded the Regional Food Product brand from 378 producers

European destination of excellence (EDEN) Awards

The European Destinations of Excellence (EDEN) initiative rewards and promotes sustainable tourism practices in smaller tourist destinations.

The EDEN initiative aims to showcase the best achievements in sustainable tourism and green transition practices across smaller European destinations, to promote the development of sustainable tourism in destinations, bringing value to the economy, the planet and the people and to establish a framework for participating destinations to exchange best practices and create opportunities for cooperation and new partnerships.

Each year, the EDEN competition will name one 'European Destination of Excellence', an accolade that will signal a destination's forward-thinking approach and identify them as a sustainable tourism pioneer. Destinations in EU countries and COSME countries with populations between 25,000 and 100,000 inhabitants are eligible to apply.

4.4.3.4 Capacity Building for Sustainable Tourism

There are only very few training courses available for entrepreneurs concerning to sustainable tourism principles.

Czech Republic failed to carry out to develop and provide online courses for businesses and regional DMO focusing on sustainability tourism practices in 2020.

The project "Support of long-term sustainable development on the national level through the tourism supplier" was approved by Ministry of Regional Development in 2018. A specific activity of the project is the education of tourism professionals in the field of sustainable tourism development. It consists of four training programs: Social media basic, social media advance course, LinkedIn and Twitter and labor-law relationship.

4.4.3.5 Financial Support for SMEs in regard to sustainable tourism activities

There are various programmes which provide financial support for SMEs in the Czech Republic at national level mainly provided by different ministries.

Support Ministry of Regional Development 2021

Support for non-state not profit organization 2021 - 2022

This programme focuses on two important pillars: Sustainable tourism development and sustainable development of regions, cities and counties. Key partners for sustainable tourism development are the Czech Tourist Club, the Foundation for Parnership, Partnership for Urban Mobility and Czech Mountbike Association (10 mil.CZK)

Support of long-term sustainable tourism development 2018

National support programme of tourism development in the regions 2016 – 2020

This programme aims to increase competitiveness of the regions by supporting better flow managements in the regions, improving the quality of the services, focusing on the reginal dispersal of the tourists and by building infrastructure.

Support of Ministry of Industry and Trade for SME

There are no particular programmes for SME that support the implementation of sustainable principles. But the government provided a so called **COVID – 19 Economic stimulus packages** to support tourism in the Czech Republic.

4.4.4 Summary and conclusion on national situation

4.4.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The Czech Republic has experienced a tourism boom in recent years. The National Tourism Board CzechTourism and regional`s DMOs focused in the pre-COVID 19 era primarily on promoting destination with the aim of drawing more tourists and increasing revenues. The negative impacts of tourism have not been addressed. Although CzechTourism is now proclaiming its commitment to sustainable tourism at least as part of the 2021–2025 strategy, given the facts mentioned above it is expected to take years before visible results are achieved. Sustainable tourism must be part of the destination's DNA as it is the case in Slovenia or Austria, and passed on to future generations, as for example in Germany under the Fairtrade Schools programme (TransFair, 2021). Based on the experience during the COVID period, the coming years in the area of sustainable tourism do not give the impression of being better. Following the lifting of the restrictive measures by the government in the summer of 2020, the number of arriving tourists exceeded the capacity of several regional destinations. Similar cases were reported despite the state of emergency and the highest pandemic level in January 2021. Local authorities did not take enough necessary measures to prevent negative impacts of mass tourism.

4.4.4.2 Challenges for the development of sustainable tourism and for SMEs

4.4.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

Despite a large number of national economic incentives and intensive regional campaigns that have so far helped maintain employment and support domestic tourism, the results indicate that the COVID-19 pandemic has had a profoundly negative effect on the tourism industry in the Czech Republic. The number of foreign tourists arriving in the Czech Republic has fallen dramatically. An enormous decrease is expected in tourism expenditure and its contribution to public budgets. Many entities in the hotel business and restaurants industry have shut down or struggle to survive. Perhaps the first positive sign for a sustainable restart of the Czech Republic seems to be the capital Prague. The current collapse of tourism in the Czech Republic is a chance to improve the image of the capital - Prague. The crisis has taken away the key revenues, but has also provided the opportunity to turn Prague into a city that is attractive to Czech families. The capital of the Czech Republic, Prague, initiated in 2020 their own campaign to attract domestic tourists. Prague City Tourism supported a campaign called "In Prague at Home", focused on domestic tourists and on special tourist vouchers. The amount allocated in the tourist voucher project was 70 million CZK, which was spent by means of what are called carriers. Anyone who stayed in Prague overnight received a 400 CZK carrier, but the maximum amount covered four nights in Prague. The vouchers were accepted in predetermined locations, primarily in Prague contributory organizations such as the zoo, botanical garden, Planetarium, or the Prague Gallery and Museum. The system became fully operational from 1 July and finished by 30 September 2020. The purpose was to support Prague hotels, cultural institutions, and monuments, but also restaurants and Prague guides. According to Prague City

Tourism the campaign “In Prague at Home”, attracted 70,000 domestic tourists who spent in the city more than 200 million CZK. Given the sustainable recovery at the beginning of September 2020, Prague approved a new tourism strategy that should change and restart tourism. The aim of the strategy is to achieve sustainable tourism with an emphasis on the cultural heritage and quality of life of Prague residents (ICOT.cz, 2020c). However, it is extremely difficult to balance idealism with pragmatism. A gap is seen between planning and implementation, which has led to the failure of many tourism plans (Lai et. al., 2006).

Other Czech regions outside Prague also focused on domestic tourists. One of the most affected cities was Karlovy Vary, where 80% of spa guests come from abroad. In the summer season 2020, the city invested 50 million CZK in the promotion of domestic tourism, of which 10 million was allocated for the voucher system (ICOT.cz, 2020b). Karlovy Vary issued 3,250 discount vouchers worth between one and five thousand CZK (40 – 200 Euro) which clients used for accommodation with spa procedures. While Karlovy Vary was the first city to introduce the system of discount vouchers, the first region to use this form of support was the South Bohemian Region. They allocated in 2020 a total of 30 million CZK (1,2 million Euro) (ICOT.cz, 2020b). At the leto.jiznicechy.cz website, visitors could generate vouchers for a 30 percent discount on accommodation in almost 300 hotels, guest houses and other accommodation establishments in the region. Similar to Prague, the South Bohemian Region prepared a new tourism strategy in response to the changing conditions after COVID-19 pandemic. According to the new strategy, in ten years’ time, the offer of tourism in South Bohemia should be SMART, modern, efficient, playful and especially clever and innovative (ICOT.cz, 2020a).

The new strategy includes the following four basic objectives (ICOT.cz, 2020a):

- Strengthening the competitiveness of the South Bohemia brand
- Stabilization of the tourism management system in the South Bohemian Region
- Consolidation of the economic contribution of tourism for the South Bohemian Region
- Efficient investment in tourism infrastructure and new smart trends

It will be crucial to motivate entrepreneurs to implement sustainable principles into their businesses. Tourism entities are struggling to survive. The government compensations cover just their fixed costs. Many hoteliers indicate that immediate measures to stay in business and the integration of health and safety measures will take priority over the implementation of sustainability principles. There are not particular programs for SME that financially support implementation of sustainable principles. Another potential problem relates to tourism professionals in the tourism sector. Tourism has been one of the most seriously affected sectors in national economy. Many tourism professionals moved to other industries. It is already seen lack of employers in hotels and restaurants. It will have possibly impact on quality of services.

4.4.4.4 Recommendations for boosting Sustainable Tourism for SMEs

What does the Czech Republic need to manage the transition to sustainable tourism destination and to be competitive in the coming years?

A national tourism policy promoting sustainable tourism principles (for public and professionals) is missing. Politically it will be crucial at a national level to set the right legal and economic incentives. Czech Republic will need an integrated effort by the government across policy areas and levels, and with the private sector. It will become necessary to increase the awareness of all stakeholders of the role of tourism as an engine for the Czech economy. The planning of a tourism development strategy must be an integral part of the complex view of destination development. Sustainable tourism is supposed to be a policy priority and part of the destination's DNA. Sustainability is a must, not an option. Tourism development policies must implement a sustainable vision for the future and explain what sustainability actually means and it must as wellimprove awareness of sustainable tourism between residents and professionals. Furthermore, support for DMO and businesses, which try to implement sustainable principles, educative campaigns and more training courses are needed. Czech Republic has to define new key performance indicators that capture not only economic, but also socio-cultural and ecological aspects to ensure the benefits of tourism outweigh the negative impacts and costs of servicing tourist demand. Put the local community at the heart of their recovery masterplan. Only citizens who are well informed about the economic, social and ecological impact of tourism will be able to decide on what kind of tourism they want and how to deal with it in their daily lives. Sustainability certification as a means to measure, verify and communicate a destination`s ecological performance can improve a destination`s image and therefore its competitiveness. A rethinking of success metrics and goals in line with new traveller behavior are as well to be develpped. An integrated approach to tourism policy is key to achieve greener, sustainable tourism development. The goal should be to implement sustainable practices so that it becomes the standard way the Czech Republic tourism industry operates.

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4.5 Croatia

Jelena Durkin
(As of June 2021)

Croatia is a Mediterranean country, strongly focused on tourism. The tourism industry accounts for fully 70% of Croatia's total services exports and is estimated to directly and indirectly contribute as much as 20% to the gross domestic product. Hence, the development of sustainable tourism in Croatia is of exceptional importance for the country's overall economic picture. In 2019, Croatia witnessed 21 million tourist arrivals and over 106 million overnights, setting records in tourist visitation numbers (Croatian Bureau of Statistics. (2020). In 2020, the global crisis caused by the COVID-19 epidemic cut these numbers by half. With the slow recovery of tourist traffic in 2021, Croatian tourism is facing numerous, important questions relating to how to gain long-term competitiveness under new conditions in the market, while adhering to the principles of sustainable tourism.

For a better understanding of the current position of tourism in Croatia and the directions in which it is necessary to boost efforts to achieve sustainable tourism, several specific features of the tourism industry in Croatia need to be pointed out.

- Strong seasonality is present throughout Croatia's tourism industry, together with great pressure on coastal areas that have a long tradition in providing tourism services and represent Croatia's most distinctive tourism product. As foreign tourists make up the bulk of the total number of tourists in Croatia, traffic accessibility and the proximity by road of outbound tourism markets such as Austria, Germany, Italy and Slovenia are Croatia's important competitive advantages, in particular in the context of post-pandemic tourism focused on travelling shorter distances by car rather than making long-haul trips by air.
- For many years the competent bodies of public administration in the field of tourism have been working to ensure year-round tourism and to boost the development of continental tourist destinations. Despite their efforts, statistics continue to show the dominance of coastal tourist destinations in the total number of tourist arrivals and in new tourism investment.
- Traditionally, Croatia is a tourist country with so-called private accommodation accounting for a high share of accommodation capacities (as much as 50% of total accommodation capacities). In Croatia, private accommodation refers to the category of tourist accommodation in households and includes rooms, flats, studio flats and vacation homes. This type of tourism was present in Croatia long before the huge success of online platforms for accommodation advertising and booking, such as Airbnb. With the advent and accessibility of these online services, the anticipated transformation of private accommodation into small family-run homes, "scattered" hotels, and similar "more-permanent" accommodation facilities, however, did not occur. Instead, tourist accommodation in households has experienced new impetus and shows an increase in the number of registered new beds. This is also facilitated by legislation that continues to provide certain privileges to owners of tourist

accommodation in households, relative to hotel facilities, especially with regard to taxation, thus encouraging new investment in this segment of accommodation that does not have a high multiplier effect for the local community in the context of creating a year-round offering, generating new jobs or developing complementary activities.

- Concerning investment in new tourism capacities, there is a clear lack of a restrictive approach to approving the permits and documentation required for the construction of new tourism facilities, and when approving such investment, emphasis is usually placed on ensuring nominal quality and not necessarily on the strict adherence to sustainable development principles. Furthermore, the granting of concessions for use of the maritime domain (vital for managing beaches as a key tourism resource) as well as the sending of inspectors to check on irregularities in the building of tourist facilities and accompanying facilities (for example, completely illegal construction, construction exceeding the dimensions permitted, degradation of the environment, etc.) are areas that lack full transparency, equal treatment of all offenders, and efficiency in stopping work that is being carried out contrary to regulations. All of this poses an exceptionally large threat to sustainable tourism, as it is not easy (and, in most cases, not possible) to restore and rehabilitate a degraded environment. In addition to suffering irreversible ecological consequences, the entire area also risks to lose much of its tourism attraction.

4.5.1 Political framework for Sustainable Tourism

4.5.1.1 National Sustainable Tourism Policies and Strategies

Given its importance for the Croatian economy, tourism is the focus of strategic documents directly concerned with tourism development as well as strategies concerned with complementary areas such as sustainable development, traffic, energy, and rural development. The strategic umbrella document that directly deals with tourism development is the **Strategy of Tourism Development** of the Republic of Croatia by 2020, to which individual action plans for various forms of special-interest tourism are linked. These are the Health Tourism Development Action Plan, Green Tourism Development Action Plan, Cyclotourism Development Action Plan, and Cultural Tourism Development Action Plan. At the time of writing this chapter (spring 2021), the Croatian Ministry of Tourism and Sport is in the process of developing a new **Sustainable Tourism Development Strategy**, together with **a National Strategy for Sustainable Tourism Development** for the period 2021 – 2030. The aim of the Strategy is to maintain Croatia's position among leading European tourist destinations, with regard to safety, quality, value added, sustainability, and innovation, and to forecast the investments required in the tourism eco-system, the development of sustainable traffic and connectivity, the smarter management of resources, and the development of adequate skills. As indicated by its title, the greatest emphasis in devising the strategy will be placed on the sustainability of tourism, with a clear vision of the changes and reforms that will need to be implemented to ensure the strategy delivers its intended results. The National Strategy for

Sustainable Tourism Development will be supplemented with an Action Plan, clearly stating timelines and identifying the actors responsible for undertaking measures and activities.

The above-mentioned strategic documents will need to be aligned with the currently valid National Development Strategy, and its Strategic Objective 1 "Competitive and Innovative Economy", which presents "Development of sustainable, innovative, and resilient tourism" as one of the top-priority areas of public policies. The National Development Strategy (developed for the period up to 2030) aims to "foster the development of the tourism offering and encourage investment in the private sector, SMEs in particular, as well as in the more important brownfield and greenfield tourism projects, that are to deliver higher value-added services and facilities (Croatian Parliament, 2021). Brownfield and greenfield investments are terms related to foreign direct investments and the difference is in the starting point of particular business project: greenfield investments start "from scratch" in terms of building completely new facilities, while brownfield investments occur when an entity purchases or leases an existing facility for its business venture (Investopedia, n.d.). A framework will be created for new job creation in tourism and a national programme for co-funding investments to improve the quality of accommodation facilities, in particular in the segment of luxury hotels and small family-run hotels. The planning and construction of new accommodation facilities will be aligned with the spatial, municipal, and demographic conditions within each region, while taking care to ensure the dignity of life of residents and the availability of sufficient numbers of skilled and qualified workers in tourism". The National Development Strategy lists the following priorities of public policies, aimed at boosting the development of sustainable, innovative, and resilient tourism (Croatian Parliament, 2021):

- Encouraging investment in the sustainable and low-carbon growth of tourism
- Enhancing the multiplier effects of tourism in the fields of agriculture, digitalisation, traffic, energy, and the environment, as well as in sports and the creative industries
- Developing functional and sustainable tourism regions, to create comprehensive tourist experiences and extend the tourist season through investment in public tourism infrastructure and tourism promotion
- Developing integrated destination management, to find specialisation opportunities, design auxiliary service/facility offerings, and extend the tourist season
- The valorisation, in tourism purposes, and presentation of cultural and natural heritage and the gastronomy and wine offerings
- Transitioning towards higher value-added niches, with emphasis on increasing the quality of the offering, boosting digitalisation, encouraging innovation, and expanding the offering of high-quality accommodation
- Eliminating administrative obstacles and improving the accessibility of public infrastructure to deliver investment in tourism
- Positioning in emerging and large, fast-growing global outbound tourism markets
- Promoting Croatia as a safe and healthy destination that provides high-quality and diverse tourism services.

Scientific analyses of previous strategic tourism development documents and the extent of their actual deliveries indicate that Croatia lacks a continuous system for tracking and

monitoring key tourism indicators, as well as a mechanism for evaluating financial subsidies granted in tourism (Wanner et al., 2020). It is hoped and expected that future documents and their implementation will mitigate these issues, and an improvement in these segments is already foreseen in the **2021-2026 National Recovery and Resilience Plan**. This document was adopted to enable Croatia's participation in the EU Resilience and Recovery Facility. The 2021-2026 National Recovery and Resilience Plan contains a special segment within the "Economy" section, dedicated to the development of sustainable, innovative, and resilient tourism. A total of HRK 2.2 billion (8.5% of the total amount allocated for the economy) is intended for the tourism sector and will be distributed through grant agreements (Government of the Republic of Croatia, 2021). The private tourism sector is expected to receive 60% of these funds, with additional opportunities for funding through partnerships with the public sector in investment in public tourism infrastructure. The document aims to improve the current situation and strategically address the challenges of the global crisis by increasing value added and the indirect effects of tourism through reforms of the management system. The focus is on investment that will contribute to the green transition and digital transition, through three lines: investment in public tourism infrastructure, investment in the private tourism sector, and investment in promoting capacity building for a resilient and sustainable tourism system. Of interest to this report is Investment Line 12, referring to investment in private-sector tourism infrastructure. The objectives of this line focus on investment in the following areas (Government of the Republic of Croatia, 2021):

- Tourism product development through investment based on the tourism development index
- Digital transition and green transition of entrepreneurs
- Transformation of accommodation capacities
- Research and development

The main target group of this investment line comprises small, mid-size, and large enterprises in tourism and hospitality and in other related activities in the value chain, as well as scientific research institutions. Importantly, all funds from this programme should be committed by the end of 2023 and paid to suppliers/sub-contracts for approved activities by the middle of 2026, which is also the deadline for reaching all objectives of the Plan.

4.5.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

In Croatia, the term "regional level" refers to the county level, that is, to the 21 counties representing comprehensive regional self-government units. Each county can adopt its own strategic development documents, covering overall development, as well as individual sectorial documents. At the county level, so-called **Master Plans of Tourism Development** have been adopted in the field of tourism, aimed at developing the tourism structure of regional destinations by defining tourism development models suited to a given region. Adopted for the period up to 2025, these plans were aligned with the valid Tourism Development Strategy of the Republic of Croatia by 2020. Considering that all Master Plans were developed and adopted prior to 2020, there is no indication in the plans of the difficulties that were to be caused by the global pandemic crisis. Nevertheless, every Master Plan

expressly states that sustainable tourism is the framework within which to develop the existing tourism potential and steer all future activities. However, there are significant differences in the treatment of sustainable tourism in the strategic documents between the Croatian coastal and mainland counties, which can be attributed to the different tourism offer as well as the different levels of visitation and general popularity of the destinations. To illustrate this difference, a brief comparison was made between two master plans (one for a coastal county and one for a continental county). The Master Plan of Tourism Development of Split-Dalmatia County (2017-2027), as a strategic document for the coastal region where tourism is a particularly important source of income and highly seasonal, with certain characteristics of over-tourism, was compared with the Master Plan of Tourism Development of Osijek-Baranja County, an underdeveloped mainland region that is still at a relatively early stage of tourism development. The key elements relevant to a comparison of the treatment of sustainable tourism in selected strategic documents are presented in table 6.

Table 6: Comparison of elements related to sustainable tourism in Master Plans for Tourism Development selected Croatian counties

	Master Plan of Tourism Development of Split-Dalmatia County	Master Plan of Tourism Development of Osijek-Baranja County
Overall aim	The master plan aims to improve the competitiveness of the county in the international tourism market and to enable the continued growth of the wealth of the local population and the use of resources in accordance with the principles of sustainable tourism.	The Master Plan aims to increase the international recognition of the region Osijek-Slavonia and to promote sustainable development based on linking agriculture and tourism through a competitive tourist product. Particular emphasis is placed on authenticity, hospitality and relaxed atmosphere as elements of the tourist experience.
Sustainability-related issues and plans	Sustainability is interwoven into various parts of it, for example it is defined in the strategic aim of managing beaches and defined as the main vision and mission of the rural tourism development with an emphasis on ecological sustainability.	Sustainability is within the Master plan explicitely mentioned only as a part of framework oriented on preservation of endangered animal and plan species.
	Private tourism sector is highlighted as the one that takes most of the responsibility for a sustainable tourism in terms of aiming to create a balance between profit and the social and ecological sustainability. New investments in tourism infrastructure	Based on existing (rather low) level of tourism development, Master plan foresees significant growth in quantity of tourism-related infrastructure, including several large accommodation resorts and big hotels. Additional emphasis is placed on tourist

	are foreseen, but oriented on more sustainable forms of accommodation and hospitality	valorisation of rivers and riverbanks as potential attraction.
Key directions of future development	A respect to the local way of life and tradition as well as environmental consciousness as two important imperatives of strategic future of sustainable tourism in the County are represented through planning sustainable traffic solutions, development of new accommodation offer based on ecologically sustainable principles and the enrichment of the tourism offer with locally grown products (olive oil, herbs, cheese etc…).	The Master Plan recommends focusing on the potential of rural areas and gastronomy as key resources in the service of fostering tourism development. The intact nature of certain areas of Osijek-Baranja County is mentioned as a competitive advantage in the demanding tourism market, but also the preservation of biodiversity has an important place in the plans for the development of new tourism infrastructure, especially in protected areas.

Source: adapted from Master plans

As shown in table 6, counties choose different approaches towards future development of tourism, depending on the stage of tourism development offer and sustainability challenges are not the same on different regions. Although taking into account geographical and economic elements when deciding on the future direction of tourism development is very useful and contextual, some uniform guidelines for the development of mandatory sustainable elements of any future tourism-related investment in Croatia (regardless of the region) should be established and implemented at the national level.

Example of good practice is conducting carrying capacities studies and developing visitor management plans. E.g., based on the Master plan the Tourism Board of Split and Dalmatia County has commissioned a scientific study defining the carrying capacity of tourism for the region. The main goal of this Study is to increase the economic effects of tourism in the County based on sustainable development by taking into account the resource base and tourist attractions and the limits arising from environmental protection and the social environment.

The tourism boom throughout the whole Dalmatia in recent years has put additional strain on the overall infrastructure, causing problems with congestion on beaches, roads and town centres. The problems have also extended to public infrastructure (sewage, water supply, electricity, municipal waste disposal, etc.), leaving the local population dissatisfied with this kind of "economic growth" that benefits a part of the population while the overall logistics of the region are reaching their limits. The study was conducted to guide the development of tourism towards sustainable tourism with maximum satisfaction of the local population by testing the limits of tourism from all aspects. The conclusion of the study was that Dalmatia has not yet reached its upper limit and that there is still room for development, but only outside the peak season, leaving very little, if any, additional room for July and August. The study should form the basis for the elaboration of further strategies for the development of

tourism in the County, as well as for planning and development documents and for the strategic and sustainable development of the entire destination at national level.

4.5.2 Key Stakeholders

4.5.2.1 Governmental and semi-governmental bodies

At the national level, tourism activities are coordinated and regulated by the **Ministry of Tourism and Sport**, as an umbrella body, through two key directorates: the Directorate for the Sustainable Development and Competitiveness of Tourist Destinations and the Directorate for Entrepreneurship Development, Investment, and Tourism Competitiveness (Ministry of Tourism and Sport, 2021). Each directorate comprises departments and offices covering all segments of tourism activities, including public tourism infrastructure, the Fund for Tourism Development, various forms of special-interest tourism, analytics, innovation and sustainable development, investment in tourism, types of accommodation and categorisation, and supervision of tourist board systems.

Croatia has a complex **tourist board system**. At the national level, the **Croatian National Tourist Board** was established to foster the promotion and development of Croatian tourism and to advance the economic interests of legal and physical persons providing hospitality services and services in tourism, or performing other activities directly related to tourism. It operates on the DMO model, covering the entire territory of Croatia, and its members are local and regional tourist boards. The overall system is financed by local tourist boards, whose mandatory members are all legal persons and physical persons engaged in transport, the provision of accommodation and/or catering services, real estate, sports and cultural activities, commerce, etc. Members are obliged to pay a membership fee based on their realised income (the percentage depending on the category to which the individual members' activities belong). The funds collected at the level of each local tourist board are allocated as follows (Statute of Croatian Tourism Board 2021):

- 9% of funds are allocated to a special account of the Croatian National Tourist Board (Fund for Underdeveloped Tourism Areas and Continental Croatia)
- 2% of funds are allocated to a special account of the Croatian National Tourist Board for the projects and programmes of associated tourist boards
- 65% of funds are allocated to the local tourist board, for carrying out local tourism activities related to managing and marketing the local tourism offering, educating and coordinating local stakeholders, record-keeping, investments in public tourism infrastructure, supporting events that contribute to tourism, etc.
- 15% of funds go to the regional tourist board (organised at the county level)
- 20% of funds go to the Croatian National Tourist Board.

In addition to collecting membership fees, tourist boards also raise funds through tourist tax.

Based on the above system, there are currently as many as 313 tourist boards in Croatia (not counting the Croatian National Tourist Board), of which **20 are regional tourist boards**. The remaining 293 are tourist boards organised at the level of towns, municipalities, and even individual settlements/places. Local tourist boards are very important in enabling a

decentralised approach to the valorisation of tourism resources that takes into consideration the specific features of individual localities and the need for a certain degree of autonomy in decision-making in tourism development at the micro-local level. Nevertheless, such a large number of tourist boards, many of which (especially in Croatia's continental regions) lack the financial strength to carry out even basic activities, also implies the need for a sweeping reform of the system as well as the need to merge/consolidate tourist boards and transform them into destination management organisations with clear objectives and priorities, and measurable performance indicators.

In addition to the Ministry and tourist boards, public institutions, as forms of public sector action in protected nature areas, are also important in the context of sustainable tourism. The basic activities of public institutions focus on protecting, maintaining, and promoting protected areas to ensure the protection and conservation of the authenticity of nature; ensuring the undisturbed course of natural processes and sustainable use of natural resources; supervising the implementation of nature protection conditions and measures in the protected areas they manage; and participating in data collection to monitor the level of nature conservation.

Within the context of sustainable tourism, the sphere of activities of public institutions in charge of managing protected areas and ecological network areas also includes the conservation of cultural heritage and traditional values (if such exist in a given area), visitor management (if visiting a given area is allowed and appropriate), and cooperation with local communities, to ensure the long-term conservation of an area's natural assets. Currently in Croatia there are 19 public institutions at the national level, 21 at the county level, and 5 at the local level. Public institutions operating at the national level and responsible for managing national parks (7) and nature parks (11) are of the greatest importance for sustainable tourism, because national parks and nature parks, while being very attractive destinations for tourists are also vulnerable areas in which it is of vital importance that only sustainable tourism is developed.

4.5.2.2 Tourism Associations

There are a number of professional tourism associations in Croatia, as well as other associations specialising in specific areas/segments of tourism, engaged in actively promoting sustainable tourism practices. The following associations are particularly important stakeholders in creating a more sustainable tourism offering:

- **Croatia Tourist Guides Association**: the association was founded in 2005 and includes 21 local tourist guide associations from all regions of Croatia. Most of these local associations have won many awards for promoting cultural heritage. The main task of the Association is to protect and ensure the prosperity and well-being of all Croatian tourist guides and to create conditions for a higher quality tourist representation, promotion of the identity, importance and reputation of Croatia.
- **Association of Croatian Travel Agencies**: Voluntary national trade association of Croatian travel agencies, which is also registered as an employers' association. Its members realise the largest part of organised tourist traffic in Croatia together with the associated members of the association such as leading hotel companies, national

airline, car rental companies, professional training organisations, tourist boards, etc. (UHPA.hr., n.d.).

- **Association of Small and Family-run Hotels of Croatia**: Founded in 2004, Association has in its regular and associate membership 146 hotels and 66 quality B&B, apartments and agro-resorts from all over Croatia. The Association's mission is to bring together the best family-run and small hotels in Croatia that stand out for their uniqueness, distinctive quality and authenticity, offering guests an unforgettable experience (Association of Small and Family-run Hotels of Croatia (n.d.). The Association strives to become an influential voice and generator of better business opportunities for its members, a progressive association for the tourism sector and a socially and environmentally conscious partner for all relevant tourism stakeholders. The main objectives of the association include the creation of internationally competitive products based on quality, uniqueness, authenticity and individualisation, as well as the enhancement of the quality of accommodation and services through certification programmes and education and guidance.
- **National Caterers' Association**: an umbrella organisation, unites the associations of caterers operating throughout Croatia. The vision of the association is to create and provide a long-term, high quality and responsive environment for successful business, development and innovation in the hospitality industry for all entrepreneurs, professionals, gastro-enthusiasts and decision makers at national and local level.
- **Association of Employers in Croatian Hospitality**: The leading professional business association in the hotel industry and the hospitality industry in general in Croatia. Its mission is to bring together hotel companies and individuals to protect and promote common interests of all members and the entire hotel industry in Croatia. The association currently has 400 hotels (and similar establishments) operated by 200 companies from all over Croatia as members.
- **Croatian Camping Union**: The Croatian Camping Union (CCU) is a non-profit organization whose main objective is the gathering of persons and legal entities providing camping services and other similar activities, with the aim of preserving and promoting the common economic, professional, scientific and other interests of its members. The members of the CCU cover more than 90% of the Croatian camping offer (Croatian Camping Union, n.d.)
- **Coordinating Body for the Development of Cycling Tourism in Croatia**: The Coordinating body is a member of European Cycling Federation and is responsible for managing the EuroVelo routes that run through Croatia. This body is particularly important in terms of sustainable tourism, as most Croatian counties invest great efforts in cycling infrastructure in order to attract active tourists and extend the tourist season.
- **Association of Private Accommodation Providers**: Association of Household Accommodation Providers – regionally organised tourism associations that bring together providers of tourist accommodation in households, provide education, help design joint marketing efforts, etc.

4.5.2.3 NGOs, Sustainable Tourism Networks and Partnerships

A large number of non-government organisations (NGOs) are registered in the so-called third sector, in Croatia. These NGOs are engaged (partially or fully) in specific segments of sustainable development such as environmental conservation, protection of the natural heritage and biodiversity, preservation of the cultural heritage, social entrepreneurship, and education for sustainable development, as well as in other segments that are not necessarily linked to sustainable tourism. Some of these associations are local and regional standard-bearers for environmental and social awareness, and have carried out campaigns, initiatives, and projects relating to sustainable tourism. The most prominent of them, in terms of efforts related to sustainable tourism development are:

- **ODRAZ – ODrživi RAzvoj ZAjednice** (sustainable community development): a national-level non-profit organisation gathering professionals from various fields, which design and apply sustainable development concepts for benefit of local communities. Involved in projects also related to implementing sustainable practices into tourism development
- **Association** "**Žmergo**": a regional-level NGO oriented on advocacy campaigns for environmental protection, environmental clean-up drives
- **Association** "**Green Istria**": a regional-level NGO oriented on protection of the environment and natural resources, and building a society that upholds principles of social justice. It actively advocates against maritime domain privatization and coastal area destruction by massive construction of tourist infrastructure
- **Association for Promoting Accessible Tourism** "**No Limits**": an organisation devoted to promotion of inclusive and accessible tourism (particularly for the people with disabilities)
- **DEŠA** - **Dubrovnik, Regional Centre for Community Building and Civil Society Development**: manages projects oriented on promoting social goals through involvement in tourist offer

Especially important among associations engaged in sustainable tourism are the Association "Our Beautiful (Homeland)" and the Association "Sun" that carry out green label certification programmes for facilities/spaces, within the context of sustainable tourism.

There are also special forms of partnerships aimed at (among other things) developing and supporting sustainable forms of tourism; called Local Action Groups. A Local Action Group (LAG) is a formally registered, specific form of partnership between representatives of the public, business, and civil sectors of a rural area, established for the purpose of developing and implementing local development strategies for the area, and for funding projects. The formation of LAGs is part of the LEADER approach that unites EU efforts in the sustainable development of rural regions. There are 56 LAGs currently active in Croatia, and their link with sustainable tourism is evident in the promotion and funding of development projects focused on related but non-agricultural activities in rural regions.

4.5.2.4 Relevant research and educational bodies

The Institute for Tourism is the research institute responsible for studying tourism at the national and international level in Croatia. It is also the only scientific public institute in Croatia specialising in research and consulting in tourism. The institute's activities are governed by an integrated approach to tourism development and management, which takes into account the development aspects of a company or a tourist destination, as well as the national tourism policies. The Institute for Tourism works together with tourism industry players with whom it shares a common goal – to achieve a higher level of competitiveness for Croatian tourism.

The University of Rijeka's Faculty of Tourism and Hospitality Management is the only specialised research and teaching institution in Croatia, engaged in conducting research as well as providing education across all levels in the field of tourism. In addition to its exceptional scientific and research work and many scientific and professional projects in the field of sustainable tourism, it boasts a unique education vertical in the field of sustainable tourism, consisting of the undergraduate study programme "Sustainable Development Management", the graduate study programme "Sustainable Tourism Development" and the post-graduate doctoral programme "Sustainable Development Management" (Faculty of Tourism and Hospitality Management, n.d.).

Educational programmes in the field of tourism focusing on the elements of sustainable tourism are also provided by the faculties of economics of universities in Pula, Zadar, Split and Zagreb, as well as by polytechnics and private business schools.

4.5.2.5 Individual tourism business and destinations of particular relevance

This section presents examples of successful enterprises, organisations and destinations that have recognised sustainable development as their long-term orientation.

Examples of successful destinations

Lošinj – the Island of Vitality: Led by the town of Mali Lošinj, the island of Lošinj is an example of a destination that has successfully transitioned from a vacation and health tourism centre during the former socialist system into a distinctive experience, branded as a destination of vitality and sustainability. For decades, the island has been known for its unique climate, biodiversity and special cultural and historical heritage. The joint efforts and common vision of the public sector (local tourist board) and the private sector (local small and mid-size tourism enterprises, and the large hotel enterprise that owns most of the hotels on the island) have resulted in successful collaboration in designing a sustainable tourism offering. This has made Lošinj an internationally recognised destination of sustainability and health, and it was one of the first destinations in Croatia to take part in the 2013 pilot project European Tourism Indicator System for Sustainable Destinations (ETIS) of the European Commission. The measurement of tourism effects using an indicator system was continued after the pilot phase, and in 2016 Mali Lošinj won the ETIS award for sustainable and accessible tourism management, in particular with regard to the breadth and depth of data collected on the island's sustainable tourism. In 2019, Mali Lošinj was the only Croatian destination to be listed among the Top 100 Sustainable Destinations and was ranked third in Europe.

The Lika Destination Cluster is an example of good practice in developing Croatia's continental destinations. Emerging as the outcome of an EU project, since 2017 the Cluster has been bringing together organisations such as travel agencies, tourist boards, protected nature area management institutions and other tourism stakeholders operating within the territory of Lika, a mountain region in the hinterland of popular coastal destinations. The Cluster's aim is to brand Lika as a destination of protected areas and a gastronomy destination, and it uses the region's natural, cultural, historical, gastronomical and health-related features to promote the destination on both the domestic and foreign tourism markets. The Cluster attaches special importance to the promotion of typical local products and to their certification (the Lika Quality system), which includes elements of sustainable tourism in efforts to increase the volume of local products through greater tourism demand, thus generating long-term positive effects for the local communities of Lika.

Examples of tourism enterprises

Hotel Split, Podstrana (region of Dalmatia) – eco hotel

One of the first hotels in Croatia to obtain a category A energy certificate, was built based on principles of "green" construction: solar energy is used for heating, rainwater is collected and used in irrigating green areas and in cleaning the hotel, food is sourced locally, and all the hotel rooms are "smart rooms" aimed at reducing energy consumption. As part of its ecological policy, the hotel uses a centrally managed air-conditioning, ventilating and lighting system and has implemented a heat recovery system. The hotel produces about 8,000 litres of hot water using solar energy, boasts well-developed recycling systems, and uses biodegradable cleaning products and eco-certified toiletries, as well as environmentally friendly and recycled materials in its everyday operations.

4.5.3 Activities and instruments for the development of sustainable tourism

4.5.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Since 2015, the Croatian National Tourist Board has been awarding the annual **Sustainable Tourism Award** to individuals, associations, companies, or local communities that have shown deep commitment to caring for the environment. All entities that have had a special effect on sustainable tourism through their contribution to environmental and nature protection, the conservation of biodiversity and the preservation of cultural heritage, can compete in this category. The principles to which proposers and candidates must adhere are the protection and preservation of heritage sites and the provision of high-quality experiences to visitors. Candidates must provide their guests with unique experiences presented as the diversity factor that separates them from others. Up to date, awards have been presented for the first three places in this category, with the winners differing with regard to sector (enterprises, public institutions, associations) and to the tourism offering forms nominated for the award (certification project, eco-ethno village, design of newly constructed campsite, environmental protection through the tourism valorisation of dolphins, etc.).

Another important award related to sustainable tourism development is EDEN. Since 2006 the **EDEN project (European Destination of Excellence)** has been active in Croatia. The project

promotes unique non-traditional European tourism destinations that develop their tourist offer on the basis of unique local resources, respecting the principles of sustainable tourism in the process. The project is run by the Croatian National Tourist Board in partnership with local tourist boards and the Ministry of tourism. The European Destination of Excellence in Croatia is selected based on a biennial public call focusing on a specific topic and specific types of tourism. Four runners-up are announced in addition to the winner. Croatia has so far presented nine national EDEN winners and 36 other finalists that were selected according to the following topics: rural tourism, tourism and local non-tangible heritage, tourism and protected areas, tourism by the water, tourism and the repurposing of physical locations, accessible tourism, tourism and local gastronomy, cultural tourism, and wellness and well-being tourism.

In terms of monitoring sustainability and providing framework for the further analysis of tourism impacts, it is important to mention **CROSTO – Croatian Sustainable Tourism Observatory**. It was established in 2016 as a part of UNWTO International Network of Sustainable Tourism Observatories (INSTO). The main objective of INSTO as well as CROSTO is to support the continuous improvement of sustainability and resilience in the tourism sector through systematic, timely and regular monitoring of tourism performance and impact and to connect dedicated destinations in order to better understand destination-wide resource use and foster the responsible management of tourism. CROSTO at the moment focused on Adriatic area of Croatia and it helps to raise awareness of the possible positive and negative impacts of tourism development in the region. In measuring and monitoring procedures, CROSTO adopts the European Tourism Indicator System (ETIS) for sustainable destination management, developed by the European Commission.

Important role in developing sustainable tourism practices is also played by cross-border cooperation programmes funded by the **EU Interreg programme**. Croatia can use the funds available through this programme for cross-border cooperation with as many as six neighbouring countries and has the opportunity to participate in four programmes of region-based transnational cooperation (the Mediterranean region, the Adriatic-Ionian region, Central Europe, and the Danube region). In each of these programmes of cross-border and transnational cooperation, tourism is one of the vital areas for joint-project applications, with the terms of programmes and the requirements of calls for project proposals focusing on the long-term sustainability of the created tourism services/facilities. Also important for sustainable tourism development are projects funded by COSME programme, e.g. project SUSTOUR (2020-2023), partnered by Association of Croatian Travel Agencies, seeks to update existing standards, training and (online) implementation tools to effectively implement sustainability within tour operators and their supply chain, to develop standards, trainings, tools, and criteria to reduce and better manage carbon and plastics, to engage and build capacities of a critical number of SME tour operators through a blended training approach, to evaluate and certify tour operators independently on the basis of international standards, to develop and implement a methodology and online tool for the sustainability certification of excursions by involving excursion suppliers including (local) transport, activities (e.g. boating,

diving, city tours), food and guiding services and to create market linkages and related financial benefits for the supported SME's.

4.5.3.2 Marketing and information services supporting sustainability in tourism

Marketing campaigns conducted by the Croatian National Tourist Board are focused on presenting the beauty and diversity of Croatia, while sustainability in the classical sense is not prominent in direct advertising and brand development. This is a challenge that needs to be tackled. As one of its key measures, the Green Tourism Action Plan proposes integrating sustainability into image, thus creating a new brand for Croatia at international presentations and on the Croatian National Tourist Board's website. This is a good method for encouraging the tourist sector to get more actively involved in efforts for creating a more sustainable tourist offer, and it would demonstrate understanding of the contemporary awareness tourists display about their impact on the environment and the local community. The credibility of marketing campaigns focused on promoting Croatia as a tourist destination need also be backed by implementing the relevant standards and certifying sustainability. Certification of tourist facilities can be conducted by restoring existing and/or implementing new systems for certification, and then emphasizing and promoting certification as part of advertising campaigns. When it comes to ranking destination sustainability, the **CROSTO project**, run by the Institute for Tourism, shows potential for creating a basis for ranking and certifying destinations, or at least for providing relevant information to relevant institutions and the tourism market, by collecting and analysing a wide array of sustainability indicators (Croatian Sustainable Tourism Observatory, n.d.).

With the aim of networking and informing general public as well as all interested stakeholders on key topics and news in the field of sustainable tourism in Croatia, the **Ministry of tourism** (as a part of EU-funded FAST LAIN project) launched a **web portal** devoted entirely to sustainable tourism. It presents valuable source of information, news, and best practice examples in the field of sustainable tourism development.

4.5.3.3 Tourism Sustainability Certification Systems and Awards

Croatia has in place several tourism sustainability certification systems. Some of these certification programmes have been stalled and/or pushed into the background due to the situation caused by the COVID-19 epidemic but are expected to continue operating in the near future. Below is an overview of such programmes, as well as certification systems not directly related to tourism, and regional certificates awarded at the level of individual regional destinations rather than the national level.

The Blue Flag for beaches and marinas is an international eco-programme for the protection of marine and coastal environments, aimed foremost at ensuring the sustainable management of the sea and coastal zones. The Blue Flag is the intellectual property of the Foundation for Environment Education of Denmark. The Blue Flag certification programme is present in 50 countries, and in Croatia it is operated by the Association "Our Beautiful (Homeland)". This certificate is important to Croatia given the indebtedness of the country's coastline and the fact that coastal tourism is the strong point of its tourism offering. The programme is a model

for environmental education and for educating and informing the public about concerns for the sea and the coast, in particular for those coastal areas that suffer the most from the pressures of tourism – (saltwater and freshwater) beaches and marinas. The Blue Flag is awarded for one season only, meaning it is necessary to repeatedly apply for the certificate. The Blue Flag programme is based on strictly defined criteria referring to ecological sustainability, the management of services provided in a given area, safety, and environmental education.

The Green Key is a globally recognised eco-label, aimed at educating owners, personnel, clients and other stakeholders (suppliers, etc.) about environmental protection and sustainable development; reducing the effect of facilities (accommodation capacities) on the environment; making a profit as a result of reduced consumption; and ensuring marketing strategies to promote facilities (accommodation capacity) and eco-labels (Green Key, n.d.). Green Key certification in Croatia is carried out by the Association "Our Beautiful Homeland". This one-year certificate is awarded to hotels and campsites as well as to small accommodation facilities (tourist accommodation in households) that apply for certification, meet the criteria, and pay the fee.

Eco Hotels is an eco-label that the Association of Small and Family-run Hotels of Croatia has been awarding since 2009 to facilities striving to reduce the effect of their business operations on the environment. The label's criteria follow those of the European eco-label Eco-Flower. The Eco Hotel label certifies that a hotel is efficiently managing energy and other resources, has in place an adequate waste management system, prepares dishes using domestic foodstuffs and raw materials sourced in the region in which the hotel is located, etc. (Eco hotels, n.d.). Although the certification programme lost most of its momentum following its initial upswing, the Association plans in the second half of 2021 to carry out the certification process for its members according to revised criteria and to educate members about the programme. The Association also aims to rank compliance with the criteria system at levels of 100%, 80% and 60%, to encourage the promotion of those hotels that have shown advances with regard to sustainability but have yet to fully meet all given criteria.

Sustainable Hotel is a label awarded by the Association of Employers in Croatian Hospitality. The certification project was initiated in 2013 when 21 certificates were awarded. The certification criteria were compiled by the Association's members, based on European certification programmes. The criteria refer to ten areas: managing sustainability, procurement, selling, marketing and PR, the environment, energy efficiency, and human potential. The second cycle of workshops and evaluations was completed in 2015, with new Sustainable Hotel certificates awarded in three categories: Basic, Advanced, and Superior (Award of the Sustainable hotel certificate, n.d.). This certification programme is also "on hold" due to difficulties caused by the COVID-19 pandemic.

EcoDomus is a label relevant at the regional rather than the national level, and it is awarded in Istria, one of Croatia's most developed tourism regions. It is a certification programme for family-run tourist accommodation and accommodation in households. The main criteria that have to be met to win the EcoDomus label are *Social and environmental responsibility*, *Overall environmental and health protection*, *Use of eco-certified washing and cleaning products*, *Use*

of eco-certified toiletries, *Use of natural materials*, *Water saving*, *Energy saving*, and *Waste sorting and recycling*. The programme is active and labels are awarded by the Administrative Department for Tourism of Istria County to a maximum of 20 new accommodation facilities each year (Eco Domus, n.d.).

Dalmatia Green is another regional certificate for family-run tourist accommodation and accommodation in households, aimed at singling out eco-friendly accommodation facilities through certification to give them credibility and make them distinctive (Dalmatia Green, n.d.). Depending on the percentage of accomplished "eco-steps", accommodation facilities are awarded the labels Dalmatia Green (50% of eco-steps), Dalmatia Green Plus (70%-80% of eco-steps) and Dalmatia Green Pro (90%-100% of eco-steps).

4.5.3.4 Capacity Building for Sustainable Tourism

The key mechanism for establishing a connection between education and tourism in practice are regional competence centres for professional education in tourism and hospitality. Six such centres are currently in development in Croatia. Those centres of competence in professional education in tourism and hospitality have been opened using EU funding. They will be hubs of excellence in vocational education and training, providing regular programmes of vocational education, advanced training, and lifelong learning as well as other formal and non-formal forms of education (work-based learning, competitions in and presentation of knowledge and skills, etc.). Combined with formal university education in the field of tourism, which was described in detail in the previous chapter, these centres will serve as the basis for capacity building for employees of small and medium enterprises in tourism, and for developing programmes intended for sustainable development of tourism businesses and destinations.

Apart from activities conducted by educational sector and centres of competences, there are many seminars held on the regional and local levels in tourism destinations, covering the practices of sustainable tourism focused on specific segments and examples of best practices. Such educations and seminars are typically organized by local and regional tourist boards, chambers of commerce, NGOs, as well as national institutions. One example is a workshop organized by the Environmental Protection and Energy Efficiency Fund called *Reduce food waste* to be held for hotels in Osijek and Pula. The workshop aims to facilitate a more effective application of the measures for preventing the generation of food waste in hospitality facilities, and to achieve adequate collection and disposal of separated waste. There are many similar examples, and a key role here is played by tourism projects funded by EU funds, particularly Interreg programmes, that typically involve the education of various target groups in tourism as one of their project activities. An issue of all such ad hoc educations, seminars and workshops is inconsistency and a lack of a systematic approach on the national level that would facilitate the flow of relevant information and transfer of knowledge and skills concerning all aspects of sustainable tourism.

4.5.3.5 Financial Support for SMEs in regard to sustainable tourism activities

As the leading authority, the Ministry of Tourism and Sports coordinates tenders for funding from EU funds in tourism, and it holds its own tenders for funding specific types of initiatives in

tourism. There are funds intended for diverse projects by local tourist boards, and there are annual tenders for projects aimed at developing cyclotourism in Continental Croatia for the purpose of shifting the focus of tourism demand from coastal destinations towards the inner part of the country. Most of the mentioned tenders are intended for users in the public sector such as tourist boards, counties and more. This means that small and medium enterprises can typically only participate indirectly – either through education programmes (if planned in projects) or as subcontractors in public procurement, for instance if there is a need to design and mark routes, promote new routes, etc.

Given the crisis caused by the COVID-19 pandemic, the Croatian Government, through the Ministry of Tourism and Sports, is providing support to entrepreneurs in tourism through the *State Aid Scheme to support the tourism and sports sectors in the context of the COVID-19 pandemic*. Through this scheme, aid will be granted to businesses in the tourism sector in the form of guarantees on new working capital and investment loans to help them bridge financial losses caused by the pandemic. Currently these funds are not immediately tied to (or conditioned by) sustainable tourism-offering development in the narrow sense, although it may be assumed that by providing support to the very survival of tourism enterprises, the fundamental conditions will be created to avert the crisis in the sector and make future sustainability possible.

When it comes to funding concerning energy management in tourism, the Croatian Environmental Protection and Energy Efficiency Fund approved 16 million Croatian kuna for 70 projects in the tourism sector in 2015 (The Environmental Protection and Energy Efficiency Fund, n.d.). These funds were either donations, subsidies or loans, depending on the status of the applying entity and location. The user of the funds comprised hotels, camps, boarding houses and other types of accommodation facilities in tourism, and the funds were used for renewable energy resource, renovations to achieve energy efficiency, constructing new energy efficient tourism facilities, procuring electric and hybrid vehicles, charging stations for electric vehicles and other purposes in transportation. After 2015, the Fund did not hold a public tender for funding exclusively for tourism, but the tenders intended for funding environmental sustainability aimed at private small and medium enterprises were accessible to all sectors, including tourism.

Funding distributed after the 2015 tender was partially available to small and medium enterprises in tourism, but there was no specific distinction by sector, i.e., the tenders were available for all businesses.

When it comes to funding from EU funds, it can be noted that most projects in tourism, especially Interreg and Competitiveness and Cohesion programmes, primarily concerned funding public tourism infrastructure – natural and cultural attractions, visitor centres, routes, trails, etc. In this case, small and medium enterprises were target groups for providing information and for integrating into tourist product networks. One notable exception is the COSME programme – in early 2021 they issued a public call for funding for boosting the uptake of digitalisation, innovation and new technologies in tourism. The aim was to boost the uptake of digitalisation and innovation in small and medium enterprises in tourism through transnational cooperation and capacity building. The activities to be financed include

strengthening transnational and cross-border cooperation, encouraging innovative solutions for better management of tourism and tourism offer, etc. The applicants or members of a project consortium could have included private businesses, including micro, small and medium enterprises in tourism.

4.5.4 Summary and conclusion on national situation

An orientation towards sustainable tourism is inevitable if Croatia wishes to preserve its valuable natural and cultural resources for the future and stop the irrevocable degradation of the environment caused by the excessive construction of new tourism capacities. Up till now, the focus of public sector institutions in Croatia, responsible for decision-making in tourism development, has been on new investment in large-scale tourism infrastructure, with funding provided (through grants and favourable loans) to improve the quality of existing facilities, create innovative tourism products, and facilitate networking in the destination.

4.5.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Croatia showed specific positive changes in previous efforts aiming to achieve sustainable tourism, particularly in the context of developing strategic documents promoting sustainable tourism (Strategy for Tourism Development of the Republic of Croatia to the year 2020, Action Plan for Developing Green Tourism). Furthermore, the new strategic document that defines tourism development until the year 2030 is even aptly named “Strategy for developing sustainable tourism to the year 2030”. This indicates that sustainability has been recognized as a basic tenet of the country’s current and future tourist offer. Strategic documents are very important but are not necessarily the only framework for success in practice.

A high degree of decentralization is evident from the large number of local tourist boards. While it may seem inefficient in certain segments, it also creates some significant qualitative progress in terms of drawing EU funds intended for cross-border cooperation in tourism (tourist boards, local self-governments and NGOs play a key role in such public calls), and it further facilitates sustainable tourism on the local level. Examples of best practices of local cooperation between stakeholders include creating tourism that emphasises benefits for the community, while at the same time minimizing negative effects on the environment, thus displaying the importance of enthusiasm, local networking and intrinsic factors, all required to achieve the goal of sustainable tourism development. Croatia maintains a good image and reputation of being a safe and accessible country full of welcoming people and great diversity, which definitely helps break new ground when it comes to initiatives for a more sustainable tourism offer.

4.5.4.2 Challenges for the development of sustainable tourism and for SMEs

In the context of sustainable tourism development, Croatia as an exceptionally tourism-oriented country notes a critical lack of continuous monitoring of sustainability indicators on the level of tourism facilities, destinations overall, as well as a lack of monitoring of the status of measures and projects already proposed in strategic documents. Furthermore, when

comparing funding for the public tourism sector and relevant public infrastructure, small and medium enterprises in tourism have sparse and inadequate support at their disposal, which would otherwise help their efforts to make their businesses more sustainable. An especially significant challenge is not just to implement sustainable practices in tourism, but also to appropriately promote sustainability and for the tourism market to accept it.

4.5.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The COVID-19 pandemic left deep consequences on the tourism industry, it emphasised tourism's vulnerability to global turbulence, as well as how significantly tourism is interlaced and inter-dependent with many different industries (UNWTO, 2020). Croatia is a small, open economy, it is greatly dependent on income from tourism, especially from foreign tourists, and the country made a lot of effort in 2020 and 2021 to build trust and promote the image of a COVID-free destination. Focus on any other aspect temporarily became secondary. This is all in accordance with the global division present in the scientific and academic communities which is observable in practice. One line considers the global pandemic as an excellent opportunity for implementing significant systemic reforms in tourism, in the context of completely suppressing mass tourism that causes overtourism and exerts great pressure on the environment and resources. Researchers and practicians promoting this approach consider it necessary to seize the moment of post-crisis recovery to overhaul how we think about tourism and the benefits we reap from it (Lew et al., 2020). The other group, to whom relevant Croatian decision-makers seem to have sided with, promotes returning to business as usual as the first step in recovery, and that drastic reforms should wait until tourism has once again stabilized. Regardless of approach, sustainable tourism has gained a new dimension as a consequence of the epidemiological and safety measures that will reduce mass gatherings for some time, and in turn change tourist preferences for choosing target destinations, means of transportation and activities during their stay. Croatia has a competitive advantage when it comes to road transportation from our primary inbound markets (Germany, Austria, Italy), allowing tourists to experience their vacation in pristine nature, in a remote environment, further enhanced by a developed camping sector and the possibility to rent vacation homes, guaranteeing some privacy and distance.

In the author's opinion, the COVID-19 pandemic could serve as an important trigger in rethinking tourism development. Namely, Croatia has a unique opportunity to take advantage of its exceptional natural and cultural resources, its relatively sound epidemiological situation, and road accessibility to devise a more sustainable policy of tourism development focused on quantity (to achieve economic effects through increased consumption by the same or even smaller number of visitors).

4.5.4.4 Recommendations for boosting Sustainable Tourism for SMEs

The efforts made by relevant Croatian public institutions and the private sector in tourism emphasised quality of service as the main focal point for creating a competitive destination. Sustainable aspects of tourism – care for the environment and socio-cultural aspects of tourism – were recommendations, not mandatory practices. When a significant number of coastal destinations increased their hospitality capacities, their municipal public infrastructure

did not follow in turn, resulting in greater pressure exerted on the environment and inhabitants, paving the way for mass tourism. In the context of small and medium enterprises in Croatian tourism, recommendations for promoting sustainability were adjusted for the current phase of soft recovery from the global health crisis. They take into consideration the existing specificities of Croatia as a destination where tourists can have a diverse experience:

- Continuation of efforts for guiding tourism towards continental destination instead of exclusively coastal destinations, as well as prolonging the tourist season using a flexible system of taxation and benefits for entrepreneurs in tourism in different parts of Croatia in combination with a stronger marketing campaign for continental destinations.
- Introduction of specific funding options dedicated exclusively to supporting sustainable practices in how small and medium enterprises in tourism conduct their business
- Encouraging small and medium enterprises in tourism to join the public and civil sector and form thematic networks for the purpose of creating new sustainable tourism initiatives in destinations, and to apply for funding to national and EU funding programmes.
- Introduction of a recognizable system of certifying sustainable tourism concerning hospitality facilities, as well as destinations overall, and promoting the certifications on the international market.
- Restricting approval of new construction licenses for building tourism facilities and implementing stricter environmental standards and requirements. When issuing permits for investment in new tourism facilities, the public sector should focus exclusively on funding those projects that can demonstrate a high level of sustainability and powerful long-term positive outcomes for the local community while causing the least possible damage to the environment. Similar considerations should apply when granting funding and aid to the tourism sector in the aftermath of the crisis caused by the pandemic. In addition to the pressure that would thus be created by the public sector to reinforce an orientation towards a sustainable tourism offering, the chances are high that pressure would also continue to mount from the tourism market. Namely, in addition to wanting unique experiences, good quality in all tourism segments, and a safe health situation, tourists are expected to continue to pay (even more) attention to the sustainability of the destination/hotel where they are staying

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4.6 Cyprus

Petros Kosmas
(As of July 2021)

Tourism has been one of the main pillars of the Cyprus economy since the 1980s. As it is the case with many other Small Island Tourism Economies (SITEs) (Shareef et. al., 2008), tourism is a dominant economic sector, contributing largely to GDP and employment compared to other EU Member States. It has also been one of the most important pillars for the recovery of the Cypriot economy after the financial crisis in 2013.

According to the key indicators for Cyprus of the Travel & Tourism Competitiveness Index for 2019, the Travel and Tourism (T&T) share of GDP was 6.9%, offering 24,100 jobs, i.e 6.3% of the total employment. The statistical data of CySTAT (2020) showed that the Cyprus travel and tourism industry had experienced relative growth in recent years, although growth speeded up more recently. With an 8,8% year over year increase in tourist arrivals since 2017, 2019 was the most successful year recorded for the Cyprus travel & tourism industry, with the number of tourist arrivals reaching 3,98 million. In general, 2019 was considered as a record year, as it is the most successful ever recorded. The United Kingdom (UK) accounted for 33.5% of the total tourist arrivals in Cyprus for 2019. Russia, the second largest tourist market in Cyprus, represented 19.7% of the total arrivals in Cyprus and the third largest was Israel with 7.4%. The Nordic countries (Sweden 3.9%, Norway 1.5%, Denmark 1%, Finland 0.6%) accounted for 6.8% of total tourist arrivals. Arrivals from Greece reached 4.3% of the total tourist arrivals and Germany reached 3.8%. The spread of the COVID-19 pandemic led to a rapid decline of the number of tourist arrivals. Resumption of travel and mobility took place in early July 2020 through partial interconnection with countries that were ranked higher regarding their epidemiological picture.

4.6.1 Political framework for Sustainable Tourism

4.6.1.1 National Sustainable Tourism Policies and Strategies

National Tourism Strategy 2020-2030

Tourism has always been the heartbeat of Cyprus' economy, contributing (directly and indirectly) close to 20% of GDP. No wonder that defining a **National Tourism Strategy 2020-2030** was classed as the Deputy Ministry's foremost priority. The basis of the National Tourism Strategy 2020-2030 was formed through an extensive study by THR Innovative Tourism Advisors (a Spanish consulting company) completed in 2017 (DMT, 2021).

The strategic focus of the Cyprus tourism industry vision is to establish as:

- a year-round destination;
- a quality destination;
- a digitally smart destination;
- a place where all residents can benefit from tourism.

The action plan has been approved by Parliament, pending an environmental impact assessment to evaluate the *"hidden cost of tourism"* to the island; it requires collaboration

between all aforementioned tourism stakeholders, under the coordinating eye of the Cyprus Deputy Ministry of Tourism (DMT). The performance will be measured by a series of Key Performance Indicators (KPIs), many of which will be related to Sustainable Tourism Development Goals (STDGs). If successful, those actions could eventually establish Cyprus as one of the 30 most competitive countries in world tourism (DMT, 2021).

Cyprus is not forgetting the most important concern of our time: climate change. Beyond a shadow of a doubt, climate change matters, as it can be judged from the recent European Green Deal announcement. Flying and cruising are increasingly being criticized for their contribution to global CO_2 emissions, and for an island like Cyprus, which is only reachable by air and sea, that reads like a disaster. More than ever before, travelers want to feel that, despite emitting CO_2 during their travels, they are at least visiting a destination which is environmentally conscious. As tourism stakeholders, therefore, we must all take more action to transform Cyprus into one of the most sustainable tourism destinations in the Eastern Mediterranean region (DMT, 2021).

The challenge

Restore Cyprus' tourism growth and revenue by means of improving its value proposition, repositioning its tourism brand and making a strategic shift towards an upgraded, enriched and diversified tourism product. Attract more and higher-spending visitors and penetrate new niche segments and markets.

The approach

A comprehensive development strategy was converted into eight (8) specific action plans and organized into an implementation programme. The National Tourism Strategy 2020-2030 is an expansive official document as a result of a fully "bottom-up approach" that was developed through consultations with several hundreds of tourism stakeholders (DMT, 2021).

Value created

- A clear National strategy that will guide tourism development for the next 15 years, approved by Government and accepted by key stakeholders
- New branding & marketing strategies defined to achieve differentiated positioning for Cyprus and a plan to attract a more, better yielding and less seasonal tourism
- An action plan set to increase Cyprus' air connectivity and to reduce seasonality
- A spatial growth model developed, identifying new areas for tourism development
- Key tourism projects and opportunities identified and a plan to attract foreign and local investment
- Business models and the value proposition of 7 key tourism products defined
- A new governance model involving key public and private stakeholders

The tangible and intangible values that Cyprus as a destination generates were based on a combination of a wide range of natural and cultural attractions, infrastructure, and services. Value is delivered in a diverse range of attractions and resources. Cyprus possesses a wide array of historical & cultural attractions, which total 125 and are easily accessible due to the country's size. Three of these have been recognised as World Heritage sites by the UNESCO.

Cyprus' main advantages as a destination for cultural tourism include its heritage, clean archaeological sites which are easily accessible and valued guide services. Health and wellbeing tourism are becoming quite a popular form of tourism for Cyprus, attributable mainly to the high quality of services and facilities provided. Lastly, it is important to highlight religious tourism is growing, primarily because of the easy access and civility of churches. The demand for religious tourism is mainly driven by northern European countries such as Russia which have similar religious beliefs to Cyprus.

4.6.2 Stakeholders

4.6.2.1 Governmental and semi-governmental bodies

Governmental bodies

The Deputy Ministry of Tourism (DMT) was established and operates according to the provisions of the Cyprus Tourism Organization Law of 1969–2005 and the related Regulation on Structure and Terms of Employment and Administration and Finance (DMT, 2021). The Organization's objective according to the law is to organize and promote Tourism within the Republic by using all possibilities and resources available. DMT implemented the Strategic Plan for Tourism 2011-2015, which followed and enhanced the previous Plan which ran from 2003 to 2010. The updated National Tourism Strategy 2020-2030 was prepared in compliance with the general directions and the nine principles of the "Agenda for a sustainable and competitive European tourism" (COM (2007) 621) which was approved by the European Commission. The main objective of the updated Strategic Plan was to define and promote the comparative advantages and the specificities of Cyprus, that would allow it to be successfully repositioned on the tourist map, to lengthen the tourist season and to offer a great diversity of tourist experiences, based on a client-centric approach which took into consideration the needs and wishes of the customers. As a Public Law Body, DMT commits to use all its available resources with the purpose to meet all expected requirements for a Sustainable Tourism Development of Cyprus.

The Department of Environment is the evolution of the Environmental Service, which was set up in 1986. Its vision is to become the authority that protects and enhances the environment and also aims to ensure sustainable development and improve the quality of life (DoE, 2021). The mission of the Department of Environment is to protect the environment through effective management and strengthening public awareness for the benefit of public health, quality of life and against loss of biodiversity both for today's society and future generations. Environmental protection is achieved through the rational management of resources and waste, the impact assessment, pollution control, tackle actions on climate change and halt the risk of loss of species and habitats, while helping to promote green growth within the contents of circular economy.

The Department of Antiquities (DoA) (est. 1935), Ministry of Transport, Communications and Work, is the government organization responsible for the management of the archeological heritage of Cyprus (DoA, 2021). The Department's main areas of activity and responsibility are the following: 1) systematic and rescue excavations as well as archeological surveys, 2) the

establishment, management and operation of archeological museums, 3) the conversation, restoration, protection and promotion of Ancient Monuments in the First and Second Schedule of the Antiquities Law, of archeological sites and of cultural objects. The DoA also promotes the use of both Ancient Monuments and archeological and ethnological museums for educational purposes and cultural activities, as well as for the stimulation of cultural tourism. In order to achieve the above, the Department's specialized staff organizes conferences, exhibitions and lectures both in Cyprus and abroad, conduct scientific research in the field of cultural heritage, and also participated in a number of EU-funded projects both as coordinator and as a partner.

The Department of Forests (DF) comes under the Ministry of Agriculture, Natural Resources and Environment. It was established in 1879 and is one of the oldest government departments (DoF, 2021). The DF is the competent state authority for the forests and forestry matters in the Republic and as such it has the responsibility of management of the state forest land which covers about 18% of the island's total surface. It has also the responsibility of implementing the state's forest policy and forest legislation all over the country. The DF is organized into 5 specialized Sectors in the headquarters, each including several specialist divisions. It also includes 3 territorial forest divisions (Pafos, Troodos and Nicosia – Larnaka – Ammochostos), one air forest-fighting unit stationed at Larnaka airport and the Forestry College at Prodromos. Furthermore, DF is involved in activities relating to biodiversity conservation such as protection of flora, fauna, trees nature monuments, restoration of degraded sites, management of NATURA 2000 sites, preparation of management plans etc. Relative to these activities is its involvement in many co-funded European projects. Finally, the DF administers a large number of significant infrastructures including three Visitor Centres, three Botanical Gardens, a Herbarium, four forest nurseries etc.

Semi-governmental bodies

The Limassol Tourism Board has been created to promote the further development of the basic and tourist infrastructure of the Limassol region and market the area as the distinct cosmopolitan seaside destination it is (LTDP, 2021). Its unique identity is based on its rich history and culture, its inviting characteristics and its convenient location, both within the island and on the map, which makes exploring easy, whether it be island wide or nearby destinations.

Paphos Regional Board of Tourism was founded by the Chamber of Paphos attended by the Municipalities of the District, and relevant state departments, tourist agencies and professional associations (PRBT, 2021). The fundamental objectives of the Committee, was the promotion and establishment of Pafos as a quality tourist destination, increasing flights, upgrading the airport of Paphos and the promotion of various tourism infrastructure and development projects.

The Larnaka Tourism Board was established in 2008 to promote Larnaka as a tourist destination; to offer new initiatives to attract visitors to the region and solve any issues that could directly or indirectly impact on Larnaka and its potential as a holiday destination (LTDP, 2021). The Board is a collaboration of all stakeholders of tourism in Larnaka, which include,

amongst others, the Larnaka Chamber of Commerce and Industry (EVEL), the Cyprus Tourism Organisation (CTO), the Municipality of Larnaka, Local Authorities of the region, hoteliers and travel agents.

Nicosia Tourism Board (NTB) was established in November 2007 within the framework of the Cyprus Tourism Organisation Strategic Plan (ANEL, 2021). The main objective of NTB is to develop and promote Nicosia as a tourist destination. The company's primary strategic plan focuses on four main areas: Cultural and Religious Tourism, Conferences & Incentives Tourism, Business Tourism and Sports tourism. The President of the Board is Mr Theodoros Kringou. The Board has representatives from the Municipalities and Communities of Nicosia, the DMT, ACTA, ACTE and Cyprus Hotel Association.

Ayia Napa & Protaras Tourism Board Is the official body responsible for the tourism promotion of the whole Famagusta region.

4.6.2.2 Tourism Associations

Cyprus Agrotourism Company (CAC), in 1996 the villagers have started, through governmental subsidies and incentives, to renovate their old houses (100-300 years old) and convert them into traditional lodgings ready to host visitors from around the globe (CAC, 2021). The need for a better and more organized co-ordination of all these SME's DMT of Cyprus (ex-Cyprus Tourism Organization) established the Cyprus Agrotourism Company, a body dealing exclusively with holidays in the Cyprus countryside. The Company started with only 7 members and today it has more than 84 members (Owners of renovated units), 100 traditional houses and boutique hotels in 60 villages around Cyprus.

The **Association of Cyprus Tourist Enterprises (ACTE)** was founded in June 1997 by a group of tourism entrepreneurs who share the common view that the development of quality and sustainable tourism is a one-way road for Cyprus Tourism (ACTE, 2021). Therefore, ACTE is composed of a group of prominent top-quality hotels and tourist enterprises all over Cyprus. The belief of ACTE and its vision and mission is the strong need for planning, development and management of a quality tourism product in Cyprus. ACTE's mission is to play a constructive role with the government and the private sector so as to enhance the image, quality and efficiency of the hotel and tourism industry in Cyprus. ACTE is an active and prominent tourism industry stakeholder. Through substantiated standpoints, systematic research and in-depth studies, ACTE has been a driving force for the necessary quality improvement and upgrading of Cyprus tourism product.

The **Association of Cyprus Travel Agents (ACTA)** is par excellence the agency involved in tourism and travel affairs. It was founded in 1954 (registered in 1975) and since then it has been recognized as the organization which laid the foundation of Cyprus Tourism (ACTA, 2021). ACTA is monitoring all developments, local and worldwide, concerning questions of tourism and travel and is in a position to exercise responsible policy regarding the rational promotion of such issues. A formal recognition and confirmation of the responsible behaviour of ACTA and of its important role is the fact that it has been approved by law as the issuing Authority for Cypriot Tour Operators. The association's prime aims are to protect, promote and develop the general interests of travel agents and of tourism and travel and to ensure that

membership of the association shall be recognized as a guarantee of integrity, competence and a high standard of service. Many members develop and promote alternative and sustainable tourism activities such as "cycling, walking, ecotourism, agrotourism, vegetarianism or veganism etc.

The **Cyprus Hotel Association** **(CHA – PASYXE)** is the Hoteliers National Trade Union. The history of its foundation goes back to the beginning of the 1930s. Today the vast majority of all hotel establishments and other licensed tourist accommodation units, all over Cyprus, are members of the Cyprus Hotel Association (CHA, 2021). The most important aims of the Cyprus Hotel Association are: 1) the protection and promotion of the interests of the hoteliers as employers and as professionals, as well as of the interests of Cyprus interests of Cyprus in general, 2) the promotion and upgrading of the Cyprus tourism development, 3) the upgrading and development of the hotel establishments in Cyprus and the improvement of the professional level of the hoteliers and 4) the solidarity between its members. The Cyprus Hotel Association, in order to achieve its aims and goals, develops a wide range of activities and offers various services to its members. Representatives of the Association participate actively in many official committees set up by the government or by semi-governmental organizations, related to the various sectors of the hotel and tourist industry and to the economy of Cyprus in general. The Association maintains close cooperation with the Hotels, Restaurants & Cafés in Europe (HOTREC) and the International Hotel & Restaurant Association (IH&RA), while is an affiliate member of the United Nations World Tourism Organisation (UNWTO), the Universal Federation of Travel Agents Association (UFTAA), the Cyprus Chamber of Commerce & Industry (CCCI), the Cyprus Employers & Industrialist Federation (OEB) and the Association of Cyprus Travel Agents (ACTA). As part of the Domognostics+ project, CHA-PASYXE promotes to its members sustainable energy solutions designed for hotel operators for efficient monitoring and controlling their operational systems.

4.6.2.3 NGOs, Sustainable Tourism Networks and Partnerships

Cyprus Sustainable Tourism Initiative **(CSTI)** is an independent organization. It was established in 2006, following a 2-year long project of the Travel Foundation that created a partnership of UK leading tour operators, environmental Cypriot NGOs, the Cyprus Tourism Organization – CTO (DMT as of JAN19), Cyprus Agents and small village producers, their communities and associations (CSTI, 2021). CSTI aims to harness tourism demand (tour operators, agents) with the supply of tourism resources (small producers and their communities) so as to develop a sustainable approach to tourism in Cyprus. Offering a memorable experience for the tourist, this approach also provides a clear economic benefit to villages marginalized by mass tourism, while minimizing adverse socio-economic and environmental impact.

Terra Cypria – the Cyprus Conservation Foundation is a non-governmental organisation (NGO), officially established in 1992 as a charitable, non-profit organisation. Its overall aim is to promote environmental awareness and sustainability through pressure and environmental education, as well as through programmes that promote conservation, environmental protection and research (Terra Cypria, 2021). The Foundation has three main objectives: The first objective is the application of pressure for better environmental protection. The second

objective is to make tomorrow's citizens environmentally aware, specifically students of primary, secondary and tertiary education, so that they can deal responsibly with the environment and manage its natural resources. The third objective of the foundation is the implementation of programmes that contribute to the increase of knowledge about and the preservation and protection of the environment. The foundation promotes sustainable agricultural practices with the aim of a better future for both the present and future generations. It also aims for actions to improve the urban environment, such as the promotion of sustainable urban mobility and the establishment and protection of existing green spaces and the minimization of urban sprawl. The foundation recognises that education and increasing the awareness of the general public about the importance and value of the environment is particularly important. This body actively intervenes in the non-promotion of tourism without limits, which leaves a hard imprint on the environment, while promoting the extremely soft and specialized forms of tourism. For this reason, Terra Cypria proposes strategies for attracting alternative tourists who seek something different, with a focus on and respect for the natural and cultural heritage of a destination, and even in periods with low tourist flows for Cyprus.

FILOKALIA is a non-profit and non-governmental organization located in Nicosia Cyprus (FILOKALIA, 2021). "FILOKALIA" has been founded with the aim to support educational and cultural activities for children, young people and adults as well as activities against poverty and unemployment in order to enhance people's quality of life. "FILOKALIA" in ancient Greek means the love of the beautiful, the good; as such the scope of "FILOKALIA" is to support and educate children, young people and adults to participate in activities that promote the principles of the common good within Europe. "FILOKALIA" due to its connection with the Orthodox Church of Cyprus and thus through more than 150 parishes, has access to a national, well-organized network of volunteers, mainly of young people, who assist in activities that promote the common good and benefit. Filokalia is leading numerous strategic European projects such as Re-Cult: Fellow Travelers in Religious Greece and Cyprus Re-Cult Magnum: Maximizing the impact of Religious Tourism in Greece and Cyprus through the targeted promotion and dissemination of the cultural and religious heritage of the Churches of Greece, Crete and Cyprus under the INTERREG V-A 2014-2020 programme.

Together Cyprus (TC) was founded with the aim of actively involving citizens in both environmental and social issues (Together Cyprus, 2021). TC is currently the only organization in Cyprus that has incorporated the 17 Sustainable Development Goals of the United Nations in its agenda and statute, while pursuing a horizontal strategy of social welfare and circular economy. In addition to the above, the term Corporate Social Responsibility – is a priority for any possible collaboration they develop. The philosophy of this organisation is to build synergies with entities that act and contribute to addressing environmental and social issues in numerous tourist destinations of Cyprus. Together Cyprus has become the most modern and successful network of volunteers on Cyprus.

Friends of the Earth Cyprus is a non-profit, non-governmental, environmental organisation, based in Limassol. The organization was established in 1980 and since then has campaigned on a number of local, national and international environmental issues (FoEC, 2021). Their goal is

to raise awareness on the importance of preserving the natural environment and to campaign for solutions to environmental and social problems by promoting sustainable policies. Friends of the Earth Cyprus is a member group of Friends of the Earth Europe and Friends of the Earth International. They are also a member of the Federation of Environmental Organizations of Cyprus (NGO's) and the European Environmental Bureau (EEB). Currently they have approximately 400 members in the whole of Cyprus. Also, the section Young Friends of the Earth Cyprus, exists that is a group of young people concerned about their future and campaigning actively for it. Friends of the Earth Cyprus is governed by their Articles of Association and their bylaws and operates under the laws of the Republic of Cyprus. An issue that concerns the Friends of the Earth is the tourism growth on the east coast of Cyprus as according to a study all the indicative parameters of a healthy tourism have been violated in these areas, namely: The availability of water, the availability of skilled labour, the availability of coastal space per tourist, the ratio of foreigners and locals. The large number of beds in combination with the reduced space for similar services (restaurants, promenades, etc.) causes a deterioration of tourism hence the charter flights. Based on this study that was done on the east coast, the concern is expressed that the same will happen on the west coast of Paphos and mainly in the protected area of Akamas.

The **Friends of Akamas** were founded in 1986. Priority is given to issue and actions for the effective protection and sustainable development of the region and communities of a NATURA2000 area named Akamas. The positions and proposals formulated by the Friends of Akamas address a wide range of issues: seeking other approaches to sustainable development and targeting local protected areas communities, opposing the over-exploitation of natural resources, promoting mild forms of tourism with respect and the environment, preservation and promotion of cultural heritage, protection of archaeological sites, protection of the beach, establishment of national parks and nature protection areas in Cyprus.

The **Cyprus Marine Environment Protection Association** has been formed with the initiative of the International Shipping Community of Cyprus with the support of the Commercial Community of the island (CYMEPA, 2021). CYMEPA is an autonomous, not-for-profit organization funded solely by its members. CYMEPA was officially registered in August 1992 as a not-for-profit organization limited by guarantee. A Caretaker Board of Directors has guided CYMEPA to its Official Launching Ceremony and First Annual General Meeting that took place on Sunday, 3rd October 1993. On that day the Voluntary Declaration "TO SAVE THE SEAS" was signed by the members and was endorsed by the following: International Maritime Organization (IMO), the Intergovernmental Oceanographic Commission (IOC) of UNESCO, the Worldwide Fund for Nature (WWF), the Club of Rome, The World Conservation Union (IUCN), the International Group of P & I Clubs and the International Chamber of Shipping (ICS). The principal aim of CYMEPA is to encourage and actively assist effective efforts to prevent all forms of pollution of the sea. The Association also helps seafarers and executives to be more aware of safety and the protection of the marine environment. CYMEPA also initiates projects dealing with environmental sustainability and maritime tourism and operates extensive public awareness campaigns, giving priority to environmental education of Schoolchildren. CYMEPA

supports and assists the Government of Cyprus in ratifying and implementing international conventions addressing the protection of the marine environment.

4.6.2.4 Relevant research and educational bodies

Cyprus University of Technology (CUT) is a new, modern and innovative university aiming to become one the major means to address nowadays Science and Technology challenges, in an effort to overcome society's problems (CUT, 2021). With high-level scientific staff and conducting applied research in high-tech sectors, CUT has already secured over €50,000,000 through 200 competing research programmes. Additionally, its academics were actively participated in the study and writing of the National Strategy of Smart Specialization, whereas the same time it maintains strong entrepreneurial relationships with the industry through its cooperation with more than 690 businesses and/or organizations. CUT has already established its participation to a significant number of research projects under HORIZON, Research and Innovation Foundation (RIF) of Cyprus, Interreg, etc.

The **Department of Hotel and Tourism Management (HTM)** of **CUT** is an international centre of research and excellence in the field of hospitality and tourism management. The objective is the rational development and dissemination of the scientific knowledge and values on which the professions of hospitality and tourism companies are based and the training of high-level scientists who will be able to employ the industry by implementing administration and management strategies that will ensure the economic, social, cultural and environmental sustainability.

The **Research Centre for Social Science and Regional Development "HERACLITUS"**[11] of **CUT** has extensive experience (more than 12 years) in international project management and will ensure high quality of project management. The Research Centre of "HERACLITUS" will ensure that all activities are carried out as planned within the limits of time and budget. Major relevant publications (produced by the research team of HERACLITUS-CUT), and/or products/services developed, or other achievements, projects or activities relevant to the proposal. The Research Centre for Social Science and Regional Development "HERACLITUS" of Cyprus University Technology has a substantial experience in projects and programmes related to the proposed project. More specifically, the research team has been involved in the implementation of several nationally/European funded projects, transfer of innovation and training. Undoubtedly, the development and implementation of the Smart Specialization Strategy for the region of Cyprus is the most highlighted research action of the Research Centre "HERACLITUS". A significant number of methodological and statistical tools were used and ensured the validity of the main finding and results. As key priority areas were chosen: the Tourism and ICT sector. The current project is proposed to focus on those three economic areas. Recently the research team of HERACLITUS of CUT has successfully completed the preparation of the Local Development Strategy of Limassol for Rural and Fishing Areas (LEADER Strategy) under the Rural Development Programme (RDP) 2014-2020 of Cyprus. In the scope of Local Development strategy of Limassol in Cyprus is has been given special emphasis in rural, fishing, cultural, and ecological tourism development for the Limassol District. The research

[11] Website under construction

team of "HERAKLEITOS" centre has been also involved in the implementation of other European funded projects, related to the proposed project.

The **Digital Heritage Research Lab** **(DHRLab)** was established in 2013 at the Department of Electrical Engineering and Information Technology of the CUT. The lab is devoted to research on the digitisation, documentation, archiving, preservation, protection and promotion of cultural heritage, tangible and intangible remains of our past. The research scientists and doctoral students employed at the lab engage in collaborative research with national and international institutions to explore the latest technological advances in the field, their efficacy, and usefulness to bring cultural heritage information to end-users, obstacles, and prospects for further development. At a European level, the lab collaborates with a network of over 150 partners from the academic, research and industrial sectors working towards the development of new tools and applications. DHRLab is hosting the unique UNESCO and European Research Area (ERA) Chairs on Digital Cultural Heritage and it's a prototype of cooperation. It has rapidly achieved world-spectrum collaboration research projects and has created a remarkable wide research network and an agenda with great potential for future activities (such as the ViMM Manifesto, Roadmap and Action Plan). The latest achievements of the Lab are significant with unique international awards like the Best Innovation Award on the Fair of European Innovators in Cultural Heritage, European Commission Research Executive Agency REA: 10 years supporting excellence in science/REA's life-changing projects and Innovation Radar Capturing and Digitisation technologies in Cultural Heritage. DHRLab participates in numerous EU-funded projecst within the framework of H2000 which co-designs pioneering and sustainable cultural tourism strategies and policies.

4.6.2.5 Individual tourism business and destinations of particular relevance

Top Kinisis Travel Public Ltd is a leading tourism organization operating in Cyprus and internationally. The organization offers a wide range of tourism services which can be purchased either directly from its offices or online through its portal www.taxidiamprosta.com. The services offered include hotel accommodation, (meet, assist, and transportation service at airports, ports, and hotels), car rentals, sightseeing, excursions, and wedding and honeymoon packages, and shore excursions services. The company also undertakes bookings for theatre shows and other social events, handles registration for conferences, seminars, and exhibitions, prepares cruise packages, issues air tickets, and plans and organizes journeys for organizations, associations, and corporations. In addition, it operates charter flights, arranges VIP travel, organizes conferences, sports and events management services. Top Kinisis is involved a programme named Meet Nicosia-Meet Culture by offering packages to visitors who are willing to travel back in time through by crossing more than 50 thematic routes that include museums, galleries, archaeological sites and other numerous points of interest of Nicosia (Top Kinisis Travel, 2021).

Limassol Development Agency Ltd **(ANELEM)** has a different business name ANELEM Ltd. Limassol Development Agency Ltd was founded on October 21, 2005 by 11 communities of the Kouris-Xylouriko cluster with the occasion of the design and implementation of the community initiative LEADER, at the local level (ANELEM, 2021). Since then, as possible stakeholders of

Limassol. The purpose of ANELEM Ltd is the development of the wider area Limassol through its contribution to the development, deployment, management, maintenance and protection of natural and cultural resources, the introduction of innovation and entrepreneurship in the productive system, the introduction and expansion of the use of renewable energy sources and the support and improvement of new collective structures and social development. More of the funds from the LEADER+ programme are allocated to rural SMEs for sustainable tourist investments.

The **Larnaca and Famagusta District Development Agency** **(ANETEL)** was founded on the 16 October 2003 as an initiative from the Union of Communities of Larnaca. ANETEL and its stakeholders are the Municipalities of Larnaka, Aradippou, Athienou, Dromolaxia, Livadia, Lefkara, Agia Napa and Paralimni, the 42 of the 45 Community Councils of Larnaka and the Community Council of Liopetri of Famagusta District, the E. V.E.L. Larnaca, the Larnaca Rural Women's Association, the SPE Rural Development, the SPE Vasililou-Pentashinos and the Cyprus Association of Professional Fishermen. Larnaca District Development Agency is an active partner and supporter to the public and private sector and operates in a rational combination for community service, entrepreneurship and management of high-level requirements of integrated development with transparency and efficiency (ANETEL, 2021).

Nicosia Development Agency **(ANEL)** was established on 16th December 2011 by the Municipalities of Greater Nicosia aiming at claiming available funds from European or other sources for the benefit of its members. It is an organization with a non-profit character (in case of profitability, profits are redistributed for the original purposes of the agency's establishment), working towards the benefit of the wider interest and meets all the conditions of Directive 2004/18/EC, Article 1.9 concerning the designation of public equivalent bodies. The Agency promotes, by all means, sharing of know-how and expertise with internal and external partner organizations, expands the area of concern of the local community and provides additional growth opportunities. It establishes stable and sincere cooperation relationships with associates and other organizations, based on the fact that the pursuit of quality is an objective of everyone involved. The project funded by the European Regional Development Fund "Promotion of Cultural Heritage as a Local Development Instrument: "ATTRACTIVE DESTINATIONS" deals with the area of protection, management and promotion of archaeological sites, which constitute an important cultural heritage of the cross-border arc of Greece and Cyprus and promote them as attractive destinations for increasing the number of visitors tourism. The main objective of the project is the creation and establishment of an attractive and off-peak sustainable tourism product through the protection, promotion, exploitation and promotion of rich natural and cultural heritage and the creation of a cross-border network of areas of natural and cultural interest that will also contribute to the development of alternative forms tourism based on rich local resources (ANEL, 2021).

The operation of **Paphos Aphrodite Development Company LTD** **(AN.ET.PA)** aims to support the development activities of the Local Government, the social and private sector, the provision of specialized services and the creation of conditions for the symmetrical development of its area of responsibility (ANETPA, 2021). Paphos Aphrodite Development Company LTD is a non-profit company and any profits are not distributed to shareholders but

are used for the development and progress of the areas covered by the company. The Role of the Development Company was developed as a dynamic process of accumulation of experiences and convergence of local socio-economic data with the trends, orientations and requirements of the wider Regional, National and European environment. Thus the Paphos Aphrodite Development Company LTD: 1) Supports local actors and local government, through a prism of mutual benefits, in the planning of development projects, 2) It is a body of decentralized development planning, emphasizing its endogenous and self-sustaining character, 3) Creates conditions and coordinates the undertaking of new and innovative productive initiatives that expand - upgrade the local labour market and diversify the productive fabric, 4) Utilizes and disseminates - publishes development opportunities, 5) Explores the possibilities of protection and utilization of local resources and contributes to the improvement of technical, social and cultural infrastructure, 6) It highlights its range, its natural and man-made advantages and in general, 7) it contributes to the improvement of local development indicators. Through the LEADER+ programme the company has participated in the implementation of development programmes that support sustainable tourism activities such as agrotourism, ecotourism, hiking tourism, cycling tourism etc (ANETPA.

The **Troodos Development Company** **(ANET)** consists of a group of experienced and specialized, in many different subjects, executives, with full complementarity, in order to offer complete solutions and consulting services in the community and private sector. Uniting all the communities that constitute the Troodos region and developing inseparable links, aims at sustainable development of this area, while promoting to solve the chronic problems faced by both these areas and the individual communities that make them up. Since 2015, by decision of the Council of Ministers, it has been designated as the Managing Body of the UNESCO Troodos World Geopark and the Visitor Centre housed in the old Asbestos mine in Pano Asbestos. One of the main aims of Troodos Development Company is the promotion of sustainable tourism in the region that is the protection and enhancement of the unique natural environment of high ecological value and the preservation and promotion of the rich history and tradition of the mountain villages. Troodos Region is divided into 5 sub-regions; Pitsilia in the east, Marathasa valley in the north, Solea Valley in the South and Wine Villages and Commandaria Villages in the west. Each of the five sub-regions has its own individual characteristics and tourism potential. These characteristics are reflected in the Strategy for the Sustainable Development of Tourism in the Region, whose main purpose is the combination of the tourism products of the sub-regions with the view of creating a completed tourism "brand". The newly adopted brand name of the region is "Trooding". Trooding is a tailored tourist package that meets the specific needs of Alternative Travelers. The regional approach of tourism development in the area is expected to provide solutions for sustainable use of resources together with the exploration and enjoyment of the Region's rich natural and historical beauty (ANET, 2021).

Nextbike Cy ltd is the license operator of the new innovative way to cycle around the city. It is an ideal climate-friendly solution for a leisure ride and as a means of transportation. The Public Bike Sharing system from all around the world is available in Cyprus with bikes available 24/7. Nextbike Cyprus collaborates with multiple companies and associations all over Cyprus,

promoting the commitment towards eliminating the environmental footprint and promoting good health and wellbeing of people. Most of the organizations that have collaborations with Nextbike, offers the benefit of free nextbike licenses to all of their employees/staff members in all cities promoting environmentally friendly practices (NEXT BIKE, 2021).

Riverland is located in the village of Kambia and is a farm of organic farming, production of organic products and many recreational activities. It started operating in the field of organic farming in 2004 with the creation of a modern integrated organic farm, animal and plant production as well as the first and only in Cyprus fully organic greenhouse. The Farm has since won the hearts and love of the people. That is why in Riverland, with continuous effort and always stable in its values and in maintaining our quality, managed to win the first prize of innovation in the primary sector (Riverland, 2021).

Aspire Cycling Cyprus is a team of cycling enthusiasts from different parts of the world who fell in love with Cyprus and the incredible biking environment that it offers, so much so that the team decided to expand their cycling business from Berlin, Germany, to Aphrodite's' birthplace. Aspire Cycling was launched in 2014 in Berlin, to offer an unparalleled biking experience for bellow bike enthusiasts and athletes visiting Cyprus (ASPIRE CYCLING CYPRUS, 2021).

Zypernbike has developed into the leading cycling holiday provider in Cyprus in recent years. Well-known tourism and professional companies are now among their business partners (Zypernbike, 2021). Numerous clubs, amateur and professional teams, sprots associations and prominent athletes regularly come to Zypernbike to train in Cyprus. Its bike station is on the coastal road approximately 23 km west of Larnaca, were everyone can find everything you need for a successful cycling holiday.

4.6.3 Activities and instruments for the development of sustainable tourism

4.6.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

With support from the Didier and Martine Primat Foundation, International Union for Conservation of Nature (IUCN) launched the **Plastic Waste-Free Islands (PWFI) project** in 2019. This three-year initiative is part of the IUCN global Close the Plastic Tap programme. The overarching goal of the project is to reduce plastic leakage from the first two islands tested in the Mediterranean Sea, Menorca and Cyprus. The project will feature in each target island a detailed material flow analysis, which will provide information on leakage across tourism, fisheries and waste management sectors. Tourism, fisheries and waste management sectors' information and experience in reducing leakage will feed into an island-specific action plan. CSTI in collaboration with Together Cyprus will develop the programme which targets the reduction of plastic waste generation and leakage in Cyprus.

The Prince Albert II of Monaco Foundation, the Surfrider Foundation Europe, the Tara Expeditions Foundation, the Mava Foundation and the IUCN – International Union for Conservation in Nature worked together to join forces in the framework of "**Beyond Plastic Med" (BeMed)** to mobilize and raise awareness of society through actions. The focus of the initiative was to disseminate best practices, regarding the management of plastic waste and

implement alternative actions in order to change the social behaviour and the behaviour of the tourism industry regarding the unsustainable use of plastics. The Stakeholders of the initiative are Small Cruise Ships, Sailboats, Water Sports Recreation Centres, Local Authorities, Municipalities, Port Authorities, Tourists and Users of Maritime Activities. The project is taking place along the coastlines of Cyprus (Larnaca, Limassol, Paphos-Polis Chrysochous, Ayia Napa and Protaras).

Domognostics+ project aims to conduct industrial research to develop and evaluate an innovative, low-cost, intelligent software/hardware solution designed for building operators to better monitor and control their hotel systems and reduce their operational expenses due to systems' inefficiencies or previously undetected events (i.e. water leakages, energy losses), based on state-of-the-art research-based data analytics, machine learning and artificial intelligence methods.

The Face to Face: Meet an Ancient Cypriot (FF-MAC) project is funded by the Cyprus Research and Innovation Foundation (RIF) and involves a quadruple helix consortium of academia, enterprises, governmental services and policy makers, and societal stakeholders, with a project budget of over 1 million Euros. The overall aim of the project is to increase the appeal and accessibility of cultural heritage for tourism through encounters with real individuals from the Cypriot past, based on bioarchaeological research leading to construction of osteobiographies, ancient life stories, and visitor encounters with real, individual life stories from the past. The project involves an integrated intervention through research, and technological and innovation activities for addressing important challenges in the relevant sector.

TExTOUR: Rethinking Cultural Tourism in Europe and beyond is an EU-funded project within the framework of H2000 with the participation of Heraclitus Research Centre and the Digital Heritage Research Lab of Cyprus University of Technology which co-designs pioneering and sustainable cultural tourism strategies and policies. The ultimate goal is to improve deprived areas in Europe and beyond. To do this, it sets up Cultural Tourism Labs at eight pilots located within the EU and outside it. Various societal players and stakeholders in the Cultural Tourism sector will be involved in the Cultural Tourism Labs. The selected pilots have diverse and complementary characteristics, which enables the project's experts to develop a wide range of scenarios for inland and coastal areas, rural and urban, deprived remote or peripheral areas, facing multiple social, economic and environmental challenges. Via the TExTOUR open access platform, knowledge will be shared to various stakeholders as the project unfolds so that they can benefit directly. Eight diverse and complementary "cultural tourism" areas will allow testing a wide range of scenarios: inland and coastal, rural and urban, and remote. One of those pilots concern one heritage jewel the village of Fikardou located at Troodos Mountains in Cyprus and Anfeh located on the coast 70 km north of Beirut.

CROSS-COASTAL-NET: Developing a Cross-Border Network for the Promotion of Sustainable Coastal Tourism. CROSS-COASTAL-NET is an integrated Project co-financed by the European Union and National Funds within the framework of the INTERREG V-A Greece-Cyprus 2014-2020 programme with the participation of Heraclitus Research Centre of CUT. The main objective of the project is the strengthening of cross-border cooperation between Greece and Cyprus by integrating Sustainable Tourism Development within two protected coastal sites

known as Natura 2000: one in the area of Akamas-Cyprus and the other in the areas of Balos Lagoon-Crete.

4.6.3.2 Marketing and information services supporting sustainability in tourism

In order to strengthen its institutional capacity for information management and monitoring in support of decision and policy making, DMT launched a **Tourism Observatory**, which operates within the Research Unit. The Tourism Observatory provides access to a broad collection of information, data and analysis on current trends in the tourism sector. It includes the latest available figures on the sector's trends and volumes, economic impact, and the origin and profile of tourists. This is achieved through the operation of a modern integrated system of electronic documentation and dissemination of research and studies which allows users to have direct and immediate access to information and data by combining multiple forms and complex sources. The tool was developed through a co-funded project implemented within the Cross-Border Cooperation Operational Programme «Greece – Cyprus 2007- 2013», co-financed by the ERDF.

Within the framework of the "**Coloured Villages of Cyprus" Label programme**[12], the Ministry of Tourism will carry out all appropriate actions for the promotion of certified villages, such as:

- joining the Heartland of Legends
- creation of a single form for the promotion of labels (multifaceted with photos and logos of labels with QR code)
- creating a promotional video
- a separate section / entry on the LNG website
- promotion on the social media of YFT
- promotion in new publications of YFT, in tourist exhibitions etc.
- familiarization trips (fam trips) for journalists

The **DMT has launched a cleaning campaign**, in the framework of which it has created films with the support of the Press and Information Office. Sensitivity to the environment determines the quality of Cyprus as a sustainable tourist destination, as it reflects the culture and principles of its local communities.

MITOS platforma-app is a dynamic free e-tourist guide developed by "Heraclitus" Research Centre of the Cyprus University of Technology. Its vision is to collect and distribute information and suggestions to the demanding visitors who want to explore the beauties of Cyprus, enjoy authentic Cypriot gastronomy, experience the traditional hospitality and get to know less promoted aspects of an island full of culture and tradition. Countless religious monuments of great cultural value scattered in all corners of the island, archaeological sites in the cities and the countryside, imprints of past human productive activity, such as mines, that have now become part of the natural environment but also the beautiful folk tradition that has been preserved and enriched by the modern way of life are the main ingredients of an alternative guide for Cypriot Tourism. Cycling and walking routes, wetlands and bird-watching spots, accessible shipwrecks and diving spots are highlighted and combined with the multiple

[12] see next subchapter

relaxation and entertainment options offered by the island. Historical sights, wine routes, wineries and traditional products workshops are intertwined with oral history and connect the past with a creative present.

In July 2021, the **New Logo of Cyprus** as a destination will be announced that it will help in changing the image of the country abroad. It will not only promote the Sun and the Sea but will make a turn with something more authentic. It will be modern and will have nothing to do with the existing one. It will not be only the ancient Greek goddess Aphrodite who will see the sun and the sea as it was until now. The new logo will be something completely different; it will promote the country as a sustainable tourist destination and will give the traveler the opportunity to imagine the authentic experiences he can receive in Cyprus. Rebranding Cyprus tourism is seen as essential for achieving its objectives set in the new National Tourism Strategy 2020-2030.

4.6.3.3 Tourism Sustainability Certification Systems and Awards

"Coloured Villages of Cyprus" Label

Based on the principles of sustainability, the Label "Colourful Villages of Cyprus" was formed with the ultimate goal of developing a new culture in the villages, in relation to the importance and value of the preservation and promotion of the special identity, the Natural and Cultural Heritage of each village, with parallel benefits for the local community. All villages of Cyprus are able to participate in the programme and the application will be submitted by the respective Competent Authority.

Plan for providing financial support for the certification of recreational scuba diving service providers in Cyprus based on the requirements of CYS EN ISO 24803:2017 standard in the context of the EU Regulations on de minimis aid

The objective of the Plan is to encourage recreational scuba diving service providers that operate in the Republic of Cyprus to become certified to international standard ISO 24803:2017, which specifies the general and specific requirements that should be applied by a recreational scuba diving service provider. Applicants that have obtained the certificate (and became beneficiaries of the Plan) shall be featured on the website and all the media of the DMT and shall be invited to the booths of diving tourism exhibitions, in which the DMT shall participate. Beneficiaries of the plan are the Recreational Scuba Diving Service Providers which are natural or legal person who provides scuba diving training services according to the certified training programme of the Organisation which authorised such person, or organized/guided diving or/and rental of diving equipment.

The **Green Key award** is the hospitality industry's standard for excellence in the field of environmental responsibility and sustainable operation. This prestigious ecolabel represents a commitment by businesses that their premises adhere to the strict code of environmental regulations as stipulated by the Foundation for Environmental Education. The high environmental standards expected of these hotels are maintained through rigorous testing and frequent spot-checks. The Green Key exists first and foremost to raise awareness of environmental and sustainability issues within the tourism industry and aims to create behavioural changes amongst guests, staff and suppliers world-wide. The Green Key

symbolises a commitment to the environment which is extremely attractive to potential guests The Green Key is constantly searching for new and sustainable methods of operation and technology in a bid to reduce the overall use of energy, water and waste.

4.6.3.4 Capacity Building for Sustainable Tourism

The DMT announced that the process of elaboration of the Strategic Environmental Impact Assessment and the Capacity Study has begun. The studies will be carried out in the framework of the National Tourism Strategy 2020-2030, whose vision is the sustainable tourism development with positive effects on the economy, society and the environment. The aim of those studies are to record possible effects of the implementation of the Tourism Strategy 2020-2030 on the environment to suggest mitigation actions and to propose a monitoring plan for the timely treatment of possible impacts.

Regarding the Capacity Study, the objectives are, on the one hand, the assessment of the development boundaries of the destination in general and the tourist areas in particular, and on the other hand, the provision of Key Performance Indicators (KPIs) that will ensure the sustainable management of tourism. The results of the two studies and the recommendations of the experts will be given to the DMT within twelve months and then will be integrated in the National Tourism Strategy 2020-2030.

Over this decade, it is expected that tourism overnights to grow by around 32%, reaching 48 million (in terms of arrivals, this means growth of 31% to around 5 million). On one hand, this is an opportunity, because there are a lot of areas in Cyprus which do not yet benefit sufficiently from the socioeconomic boost that tourism offers. These places can therefore be beneficiaries of upcoming tourism development. On the other hand, such growth could also be a worry, if not managed correctly, because some areas are becoming busy and natural resources are being stretched to their limits. In places like these, focusing on quality rather than quantity, will be of utmost importance going forward[13]. As a destination, therefore, Cyprus as a destination should aim to combat seasonality and regionality by dispersing visitors to various areas, to various places of interest, at various times of the day, at various months in the year.

4.6.3.5 Financial Support for SMEs in regard to sustainable tourism activities

Subsidy scheme for visitable handicraft and enogastronomy workshops in the context of the De Minimis Aid Rule

The DMT aiming at the development of cultural tourism and rural tourism, will offer financial support for carrying out visitable workshops regarding the field of traditional or / and modern handicraft and enogastronomy. The workshops are addressed to both Cypriot and foreign visitors and their aim is to introduce them to the tourist product of Cyprus. Visitors will have the opportunity to be toured to the workshops, watch live the crafting process and the preparation of traditional products of enogastronomy, and if they wish, take part in experimental, interactive activities, to acquire unique and authentic experiences.

[13] National Tourism Strategy 2020-2030

Grant Scheme for Investments in the Enrichment and Upgrading of the Tourism Product for Lengthening the Tourist Season

The DMT announced the 1st Call for Submission of Applications under the Grant Scheme for Investments in the Enrichment and Upgrading of the Tourism Product for Lengthening the Tourist Season. The Scheme is co-funded by the European Regional Development Fund and the Republic of Cyprus under the operational programme "Competitiveness and Sustainable Development 2014-2020". With the main objective of improving the competitiveness of the hotel and ancillary tourist product of the country, investments and interventions are encouraged and supported by the Scheme aiming at mitigating the limitations of tourism development such as the seasonality of tourist flows and the one-dimensional tourist product. The Scheme aims at (a) the development of new products and services concerning special interest tourism in the fields of conferences and sports training tourism for football and swimming (b) supporting investments of existing hotel and tourist accommodation units for the upgrading, modernization and enrichment of their facilities and services (c) the modernisation and enrichment of premises and facilities of establishments relating to special interest products and accommodation units. Beneficiaries of the scheme could be any large, medium and small enterprises.

Incentive Scheme for Providing Financial Support to Organize Familiarization Trips for Special Types of Tourism in Cyprus

The Scheme was prepared based on the National Tourism Strategy 2020-2030 and its aim is to inform/familiarize participants with the Cyprus tourism product and to strengthen the image of Cyprus as an attractive and competitive destination for the special types of tourism on foreign markets. Beneficiaries are local licensed Tourism and Travel Agencies and other directly involved stakeholders (depending on the sector). The invited participants of the proposed familiarization trip should be decision-makers, who specialize in transferring special interest groups of sports tourism, religious tourism, conference tourism, golf tourism, rural tourism, wine gastronomy tourism, health tourism, cruise tourism, diving and nautical tourism.

Summer Support Scheme for Tour Operators

The DMT will be implementing an EU approved support scheme for the purposes of cooperating with Tour Operators, in an effort to mitigate the effect of COVID-19 on tourism. Eligible for cooperation with the DMT, within the framework of the Support Scheme are Tour Operators. DMT will be paying a set amount for every holiday package sold by an eligible Tour Operator to the Republic of Cyprus. The Scheme is applicable to all source markets for the period 1/6/2021-30/9/2021.

***Plan for providing financial support for organising international sporting events in Cyprus in the context of EU rules on de minimis aid* (*DE MINIMIS*)**

Aim of the scheme is to encourage the organising of international sports events, including tournaments or training camps aiming at the development of Sports Tourism and the increase of overnight stays for the hotel industry during the low tourist season. Beneficiaries are persons or legal persons intending to undertake the organisation of a sports event, which responds to the above objective.

Domestic Tourism Support Scheme

The DMT, after the approval of the Council of Ministers, announced the extension of the duration of the **Domestic Tourism Support Scheme** for the period from 1 June-30 November 2021, excluding July and August. The Scheme is addressed to permanent residents of Cyprus and aims primarily at encouraging holidays in Cyprus. It is noted that this is the third extension of the Scheme, decided by the Council of Ministers, as it is esteemed particularly beneficial for the tourism industry as a whole and consequently, the economy and the society, in general. The Scheme includes Tourist Accommodations (Hotels, Organised Apartments, Tourist Villages and Agrotourism Accommodations), which offer for the whole period at the maximum price of 60 euros, breakfast included for a double room per night.

4.6.4 Summary and conclusion on national situation

4.6.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

All the local actors through the experience gained after so many decades of “hard” tourism activities have recognized the core values of sustainable tourism development.

The vision of the **National Tourism Strategy 2020-2030** is "sustainable development of Cypriot Tourism in a way that is beneficial to the economy, society and the environment." This vision has become, and will surely remain, the compass in the Cyprus DMT for the next decade. It is becoming clear that DMT’s role is not limited to increasing the number of tourist arrivals in the country, but to the overall development of the destination and the management of tourism in a sustainable way, so that future visitors and above all future residents continue to enjoy the island.

4.6.4.2 Challenges for the development of sustainable tourism and for SMEs

Cyprus must never forget the most important concern of our time: climate change. Beyond a shadow of a doubt, climate change matters, as it can be judged from the recent European Green Deal announcement. Flying and cruising are increasingly being criticised for their contribution to global CO_2 emissions, and for an island like Cyprus, which is only reachable by air and sea, this reads like a disaster. More than ever before, travelers want to feel that, despite emitting CO_2 during their travels, they are at least visiting a destination which is environmentally conscious. Nowadays, all tourism stakeholders must therefore take more action to transform Cyprus into one of the most sustainable tourism destinations in the Eastern Mediterranean region.

4.6.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

Cyprus is so keen to get its tourism industry back on track by offering to cover the costs of any travelers who test positive for COVID-19 while on vacation in the Mediterranean island nation. Accommodations in the country have reopened on 1/6/2021, while international air travel has restarted on 9/6/2021. In general, officials have expressed their hope and optimism for a significant recovery of the tourism sector due to the speed of the vaccination programme against COVID-19 and to specific actions in the framework of the National Strategy for Tourism 2030.

The DMT has announced a support scheme to support domestic tourism in Cyprus. Aimed at permanent residents of Cyprus, the scheme strives to encourage domestic travel in Cyprus to support local SMEs and extend the summer season in 2020. This plan is expected to reduce the recession in the tourist economy and maintain employment in these challenging times due to the ongoing Coronavirus pandemic. The scheme is addressed to permanent residents of Cyprus and aims primarily at encouraging holidays in Cyprus via the provision of affordable prices by tourist accommodations and the granting of part of the cost of accommodation to the citizens who shall utilise this scheme. It is noted that this is the third extension of the current scheme, decided by the Council of Ministers, as it is esteemed particularly beneficial for the tourism industry as a whole and consequently, the economy and the society in general. This scheme includes tourist accommodations (hotels, organised apartments, tourist villages and agrotourism accommodations), which offer for the whole period at the maximum price of €60,00 (breakfast included for a double room per night). The DMT via the scheme provides the coverage of 35% of the cost of accommodation for children as well.

Also, as mentioned previously, the DMT is implementing an EU approved support scheme for the purposes of cooperating with tour operators as an effort to mitigate the effect of COVID-19 on tourism. This scheme is applicable for the period 1/6/2021-30/9/2021.

4.6.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Over this decade, it is expected that tourism overnights are going to grow by around 32%, reaching 48 million (in terms of arrivals, this means growth of 31% to around 5 million). On one hand, this is an opportunity, because there are a lot of areas in Cyprus which do not yet benefit sufficiently from the socioeconomic boost that tourism offers. These places can therefore be beneficiaries of upcoming tourism development. On the other hand, such growth could also be a worry, if not managed correctly, because some areas are becoming busier and overcrowed and natural resources are being stretched to their limits. In places like these, focusing on quality rather than quantity, it will be of utmost importance going forward. Therefore, Cyprus, as a destination, should aim to combat seasonality and regionality by dispersing visitors to various areas, to various places of interest, at various times of the day and at various months in the year.

The action plan through the National Tourism Strategy 2020-2030 requires collaboration between all aforementioned tourism stakeholders, under the coordinating eye of the Cyprus DMT. If Cyprus succeeds in doing this, tourism could provide an added value of around €1.5 billion per year to the economy by 2030. This represents an increase of 53% compared to a contribution of €2.9 billion in 2018. In terms of visitor spending per overnight, by 2030 the country could approach an average of €90 per person, an increase of 16% compared to 2018, when the average was €75 per person. Around 40% of overnights could eventually be between November and April, up from 22% in 2018; as for overnights in mountain and rural areas, these could increase, by 2030, to around 400,000 a year, from 100,000 in 2018. The only sure thing is that in order for SMEs to benefit from these optimistic forecasts they will need to have incorporated sustainable practices as they will be applied through their operations.

Cyprus is a beautiful country with a fantastic climate and an enviable lifestyle. Thus, its most important goal should be to preserve them for future generations through a holistic approach to tourism. Capitalizing the local heritage, cultural dimension, and natural environment through special-interest products improving price competitiveness and value for money, e.g. by modernizing legislation related to services like restaurants, taxis, rental vehicles, theme parks etc.

A "*Cyprus made of plastic*" will never be competitive or profitable. Last but not least it must be noted that the authentic Cyprus has a very large market. By promoting the authenticity of the Cyprus rural and mountainous areas, e.g. by linking authentic gastronomy with agriculture and spreading tourism revenue across to all regions of Cyprus, the island will be established as a place where all residents can benefit from tourism.

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4.7 Denmark

Kristof Tomej
(As of August 2021)

4.7.1 Political framework for Sustainable Tourism

4.7.1.1 National Sustainable Tourism Policies and Strategies

"Denmark should be one of the world's most sustainable tourist destinations," was the way Danish Minister for Industry, Business and Financial Affairs Simon Kollerup was quoted in the ministry's press release which announced the commencement of work on a "*strategy for sustainable growth in Danish tourism"* in 2019 (Erhvervsministeriet, 2019). The development of this strategy has been commissioned by the minister to the National Tourism Forum (*Det Nationale Turismeforum*) – a 10-member body comprising representatives of destination management organizations, municipalities, state agencies, the research community, and the tourism industry (Erhvervsministeriet, n.d.). The aim of the strategy is to envisage ways of ensuring continued growth of tourism in Denmark, which is seen as contributing both to the economy and the local populations' wellbeing, but in "a sustainable way". While originally scheduled to be completed by early 2021, the strategy has been postponed due to the difficulties in the tourism industry caused by the COVID-19-induced pandemic. In January 2021, an open call was published by the Ministry on behalf of the National Tourism Forum to collect ideas related to the upcoming strategy from various stakeholders (Erhvervsministeriet, 2021).

Until the new strategy's adoption, the current National Strategy for Danish Tourism (*Den Nationale Strategi for Dansk Turisme*) entitled "Denmark in growth" (*Danmark i vækst*) remains valid (Erhvervsministeriet, n.d.). This document, developed by the National Tourism Forum and adopted by the Danish Government in 2016, focuses on growth in terms of both arrivals and tourist expenditure in Denmark by 2025 as well as the improvement of the quality of tourist experiences, better efficiency and coordination of marketing activities, digitalization and innovation. Sustainability and sustainable development are not prominent in the final version of the strategy despite the active attempts of the former researcher member of the National Tourism Forum to integrate the notions during the drafting of the document. In addition to the National Strategy, tourism, especially in terms of the state's involvement and the distribution of public funds is guided by the Law on Danish Tourism (*lov om dansk turisme*) of 2014 with substantial amendments that came into force in 2019.

While sustainable development in regard to tourism is not framed by a dedicated policy document at a national level, the state has expressed strong commitment to sustainable development overall through climate and energy policy and contributions to the UN Sustainable Development Goals (SDGs). The Danish Law on Climate (*lov om klima*) of 2020 established the ambitious goal of Denmark becoming a climate-neutral society by 2050 the latest. In addition to this, Denmark took on the responsibilities of reducing its carbon emissions in line with the Paris Agreement and the EU's 2030 Climate Target Plan (Energistyrelsen, n.d.). The Government's new Action Plan for the UN SDGs (*Handlingsplan for FN's Verdensmål*) of

2021 refers to research on sustainable tourism development at the University of Southern Denmark as an example of research and teaching contributing to work with the Goals (Regeringern, 2021). It is also important to mention that the relatively strong powers constitutionally held by municipalities in Denmark mean that each municipality may choose to develop its own strategy of sustainable development, and many of Danish municipalities have adopted such policy documents. The five Danish regions also adopt their own documents in regards to climate policy and the SDGs.

4.7.2 Key Stakeholders

There are a multitude of stakeholders in the public, private and non-governmental sectors in Denmark that have an involvement with matters of sustainable tourism development. It is important to consider that the issue itself is very dynamic, and the stakeholders, their positions and constellations thus should not be considered static.

4.7.2.1 Governmental and semi-governmental bodies

The main department of the Danish Government currently responsible for tourism development and sustainable tourism development specifically is the Ministry of Industry, Business and Financial Affairs (*Erhvervsministeriet*). The main objective of the ministry is to promote business policy in the country. The Danish Law on Tourism prescribes that it is the Minister for Industry, Business and Financial Affairs who appoints the National Tourism Forum and the Danish Tourism Advisory Board. In addition, the minister appoints the Danish Board of Business Development (*Danmarks Erhvervsfremmebestyrelse*), which is tasked to oversee decentralized business promotion initiatives with tourism being one of the focus areas. Matters of sustainable tourism development in regards to SMEs are also affected by the activities of other government ministries and their agencies.

The Environmental Protection Agency (*Miljøstyrelsen*) and the Nature Agency (*Naturstyrelsen*) under the Ministry of Environment of Denmark (*Miljøministeriet*) as agencies tasked with enforcing environmental protection and managing state-owned nature areas have been previously involved in projects and initiatives related to the responsible use of nature in tourism activities. The Danish Veterinary and Food Administration (*Fødevarestyrelsen*) and the Danish Agricultural Agency (*Landbrugsstyrelsen*) under the Ministry of Food, Agriculture and Fisheries (*Ministeriet for Fødevarer, Landbrug og Fiskeri*) oversee regulations in the area of food protection and the use of agricultural and fishing resources. In this role, they have participated in initiatives on (organic) gastronomy, rural tourism, and angling.

The national level of tourism coordination and promotion in the public sector is complemented by four commercial foundations prescribed by the Law on Tourism. These are VisitDenmark, Danish Coastal and Nature Tourism (*Dansk Kyst- og Naturturisme*), Wonderful Copenhagen (which also coordinates Danish City Tourism (*Dansk Storbyturisme*)), and MeetDenmark (*Dansk Erhvervs- og Mødeturisme*). These foundations serve as tourism development organizations for the respective forms of tourism.

The decentralized level is represented by destination management organizations formed in and across Danish municipalities. 19 of these organizations are united under the umbrella of

Danish Destinations (*Danske Destinationer*). This association, among other things, is actively involved in two ongoing major governmentally funded projects on sustainable tourism development in Denmark. In addition, the KL - Local Government Denmark (*KL*) (formerly *Kommunernes Landsforening*), the association and interest organization of the 98 Danish municipalities has launched the Network for Sustainable Tourism in 2019. This Network is aimed to discuss matters of sustainable tourism development from a local municipality perspective.

4.7.2.2 Tourism Associations

There are three major industry associations in Denmark that have a significant stake in tourism. The Confederation of Danish Industry (*DI*) and the Danish Chamber of Commerce (*Dansk Erhverv*) both have sections dedicated to tourism, the service and experience economies. Both organizations have been involved in discussions of sustainable tourism development, but as they represent individual tourism businesses, their emphasis is on competitiveness of Danish tourism and attraction of high-expenditure guests.

HORESTA (inspired by the abbreviation from the Danish expression for employer association for the hotel, restaurant, and tourism industry (*hotel-, restaurant- og turisterhvervets arbejdsgiverforening*)) is an industry and employer association for the Danish tourism and experience industry and as such it unites hotels and other accommodation businesses, restaurants and attractions. Sustainability is one of the main focus areas of the organization with multiple dedicated projects. HORESTA was the co-initiator of the international Green Key certification scheme, whose secretariat is still hosted by the organization.

4.7.2.3 NGOs, Sustainable Tourism Networks and Partnerships

The Outdoor Council (*Friluftsrådet*) is an umbrella organisation uniting national organizations covering outdoor recreational activities and nature protection interests. As an organization with an interest in both sustainable development and tourism and leisure activities, it has been actively involved in matters related to sustainable tourism development. It was one of the co-founders of the Green Key certification scheme. As the administrator of the distribution funds for outdoor activities that come from profits of national lotteries, the Outdoor Council has also funded various initiatives related to sustainable tourism development in Denmark. Most notably, the Outdoor Council has been the initiator and coordinator of the Danish nature parks programme. It is also the co-initiator of the "Sustainable tourism development in Danish National parks and Nature Parks" project together with University of Southern Denmark tourism researchers and the Wadden Sea National Park.

Among other NGOs it is worth mentioning the Danish Cycling Tourism association (*Foreningen Dansk Cykelturisme*) of public and private partners, whose relation to sustainable tourism lies in the association's mission of developing cycling tourism in all of Denmark. The association also serves as EuroVelo's coordination centre in Denmark.

4.7.2.4 Relevant research and educational bodies

Multiple Danish research and educational institutions have been dealing with sustainable tourism issues over the years. The most notable of these are the Centre for Tourism, Innovation and Culture at the University of Southern Denmark (*Syddansk Universitet*) and the Centre for Regional and Tourism Research (*Centre for Regional- og Turismeforskning*) – an independent research centre located on the Danish island of Bornholm. In addition, research on sustainable tourism issues has been performed by individual researchers at the Copenhagen Business School, Roskilde University, Aalborg University and other universities and tertiary education institutions in Denmark.

4.7.2.5 Individual tourism business and destinations of particular relevance

There have been numerous private initiatives of various scales that illustrate sustainability efforts in tourism in Denmark. In the accommodation sector, it is worth mentioning the Sinatur Hotel and Conference chain, owned by the Danish Union of Teachers. Apart from setting ambitious goals for 2030, the chain has already been actively involved with recycling, reusing and reducing wastes, using organic and sustainable foods, ensuring responsible water consumption and ensuring fair employment practices. The chain's hotels bear multiple environmental labels, and some have been nominated and received national and international sustainability awards. Among other hotel chains, Scandic Hotels (based in Sweden) and Cromwell have received recognition for their sustainability practices. Hotel Crowne Plaza Copenhagen Towers, owned by BC Hospitality Group A/S and franchised through Intercontinental Hotel Group, also received multiple awards due to the hotel building's environmentally friendly construction in 2009 and other hotel practices.

Among tourist attraction, it is worth pointing out the Wadden Sea Centre (*Vadehavcentret*). The centre that provides interpretation of the unique nature of the Danish Wadden Sea has been recognized both nationally and internationally for its activities, the centre's state-of-the-art building, the exhibitions, and in 2020, it was awarded the Meyvaert Museum Prize for Sustainability 2021 by the European Museum Forum (European Museum Forum, 2021). The centre also serves as an official gateway to both the Wadden Sea National Park and the Wadden Sea UNESCO World Heritage Site.

The Wadden Sea National Park can be considered a pioneer in recognizing sustainable tourism as an important part of sustainable development illustrated by the existence of a dedicated sustainable tourism development strategy. Similarly, the Wadden Sea world heritage site and the Christiansfeld world heritage site both adopted dedicated sustainable tourism strategies. Other UNESCO world heritage sites in Denmark are at the various stages of developing similar plans.

4.7.3 Activities and instruments for the development of sustainable tourism

4.7.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

The COVID-19-induced pandemic has resulted in a huge damage to the tourism industry across the world. As in many other countries, in Denmark, the Government agreed on help packages

specifically directed at the tourism industry. In 2021, the government's so-called summer package comprises 295 million Danish kroner (approximately 40 million Euros) to various businesses and organizations in the tourism and experience industries, where sustainable growth and the so-called "green transition" were declared as the guiding frame. In addition to this, the Danish Board of Business Development (*Danmarks Erhvervsfremmebestyrelse*) distributed millions of Danish kroner to different destination management organizations across Denmark for projects focusing on various aspects of "green transition" and sustainable tourism development, specific to the area. On a national level, the Board awarded funds to projects on sustainable experiences and attractions in Denmark, sustainable outdoor camps and brands, sustainable holiday houses, and almost 3 million Danish crowns (approximately 400 thousand Euros) were distributed to Danish Destinations (*Danske Destinationer*) for a project on sustainable tourism in practice, where international best practices are to inform new indicators for sustainable destination development. It is important to note that the funds distributed by the Board cannot be applied for directly by individual businesses – it is the public recipients of the funds, usually destination management and tourism development organizations, that can further share funding with private businesses.

4.7.3.2 Marketing and information services supporting sustainability in tourism

Several promotional campaigns have been launched to overcome the difficulties caused by the COVID-19 pandemic and motivate people to travel, especially domestically. The most notable of these is the "Meget mere end #bareDanmark" ("Much more than #justDenmark") campaign run by VisitDenmark from summer 2020 onwards. Additionally, there have been campaigns to motivate traveling to outdoor activities within Denmark by plane and by train. At the same time, none of these campaigns were specifically addressing sustainable tourism development.

The **Green Key certification scheme** hosted by HORESTA runs an online search platform for "sustainable places", which includes accommodation, meeting facilities, and attractions, which have been awarded the Green Key certification. This tool thus can be used by tourists or partners to search for establishments with sustainable practices.

GoGreenDenmark, which originally started in Aarhus and then expanded to Copenhagen and other parts of the country, provides a similar online platform listing tourism businesses (among others) which fulfil certain sustainability criteria established by the creators of the initiative.

4.7.3.3 Tourism Sustainability Certification Systems and Awards

The previously mentioned international Green Key certification scheme and eco-label was originally created in Denmark as a cooperation between HORESTA and the Outdoor Council as well as other local tourism organizations. Around 150 businesses in Denmark bear this label today. On international scale it is now operated by the Foundation for Environmental Education (FEE) with its headquarters in Copenhagen, which also runs the Blue Flag environmental certification scheme for beaches (240 are certified in Denmark), marinas and boating operators. The Green Key scheme has been replicated in the form of Green Restaurant (started in 2021), Green Sport Facility (around 75 facilities in Denmark), Green Camping (6 camping places) and Green Tourism Organization (7 organizations) eco-labels.

In addition to the tourism-specific certification schemes, tourism businesses may also engage with labels for consumer products – either by purchasing certified supplies or by offering certified produce and products to tourists. Here, the Nordic Swan / EU ecolabel for non-food consumer products (including cleaning products, cosmetics, construction materials, furniture etc.), administered by the independent Ecolabelling Denmark (*Miljømærkning Danmark*) unit of the Danish standardization authority, and the red Ø-label (*Ø-mærket*) for organic food products, administered by the Danish Veterinary and Food Administration (*Fødevarestyrelsen*) are the most prominent.

4.7.4 Summary and conclusion on national situation

4.7.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Denmark has a long history of actions and measures contributing towards sustainable development – from environmental technologies and design to social equality, partnerships and collaboration. The ambitious goals of the Danish government in regards to the SDGs, climate neutrality and reduced greenhouse gas emissions fit well with this history. At the same time, the tourism industry has only recently started engaging with matters of sustainable development. More and more organizations, including SMEs are choosing to work with SDGs and take on voluntary commitments of being more "responsible", but there is plenty of space for more action. The corona-crisis, which had a particularly damaging effect on the travel and leisure industries, brought tourism and particularly sustainable tourism development to the fore. This is especially visible through the historically high amount of funds, dedicated by the government on matters of sustainable tourism in 2021. There has also been an increase in interest in the private sector, where the Green Key certification scheme received the highest number of applications in its history in 2020 (Therkselsen & Ren, 2021).

4.7.4.2 Challenges for the development of sustainable tourism and for SMEs

One of the greatest challenges to sustainable tourism development in Denmark is the lack of a vision of tourism's contribution to sustainable development itself. This is quite notable when reviewing national policy documents relevant for sustainable development which fail to establish connections between activities in tourism and the ambitious climate- and sustainability goals. The lack of such established connections inhibits the possibility of designing tourism as a means to better societal and global wellbeing rather than a goal of its own (Liburd, 2021). In regards to SMEs, this means difficulties for tourism businesses to be fully included in the "green transition" and lost opportunities for engaging more businesses in developing and implementing innovative future-oriented solutions.

4.7.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The (post)-COVID-19 recovery was seen by many not just as a way of rebuilding what has been lost due to the crisis but as an opportunity for constructing more sustainable futures. This can be illustrated by the omnipresence of the word "sustainable" in help packages and strategies for tourism recovery. At the same time, there is little clarity how it will be ensured that the

new initiatives are indeed different from the status quo and are contributing towards sustainable development. The lack of procedures and infrastructures for ensuring this translates into a serious threat for missing on this opportunity. The momentum provided by impressive investments and funding in the field of tourism, the pressure of coming up with innovative and new approaches and solutions and the ever-high awareness of environmental and global issues both by tourists and industry representatives (Therkelsen & Ren, 2021) provides a unique chance, but it is not secure yet whether recovery will proceed with sustainable tourism development or by rebuilding the past through traditional tools of promotional activities and tax incentives.

4.7.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Denmark has a long history of civic engagement, associations, and partnerships that contributed to the creation of today's welfare state and high quality of life. The current global challenges pose threats that require a new and higher level of working across organizations, destinations and country border – namely collaboration, where the sum of the work is more than its individual parts together (Liburd, Duedahl & Heape, 2020). Such collaboration, however, also means listening to others and being ready to transform through the process. SMEs are an integral part of networks and stakeholder constellations, whose collaboration is necessary for sustainable tourism development (Liburd, 2021). To promote such collaboration, there is a need for spaces where it can take place, for facilitation of collaborative processes as well as for clear incentives for working with others. The urgency of the pressing issues and the self-declared timelines should motivate the construction of collaborative infrastructures in Denmark for leveraging tourism's potential in the sustainable development in the world.

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4.8 Finnland

Pekka Alhojärvi
(As of August 2021)

4.8.1 Political framework for Sustainable Tourism

The national framework regarding sustainable development in Finland influencing the sustainability of tourism is based to a large extent on two main international processes, namely the UN Sustainable Development Goals (SDG) and the UN Framework Convention on Climate Change (UNFCCC).

Sustainable Development Goals and tourism cluster

The Finnish Government prepared the first national implementation plan in 2017 for the incorporation of the Sustainable Development Goals in national frameworks, whereas the second implementation plan has been prepared in 2019 by the present government. These plans created a solid base for a dialogue between the Government and the Parliament on the national implementation of the Agenda 2030.

Sustainable development is incorporated into all phases of the policy cycle: Planning, budgeting, reporting and monitoring of governmental activities. Challenges remain in ensuring that all the phases of the policy cycle are interconnected in a systematic way so that policy planning guides the preparation of the budget, and reporting would clearly indicate how the government has succeeded with the allocation of resources into policy areas that promote sustainable development in a desired manner. (Alhojärvi 2021)

The same type of commitment was made already in the 1990's, in regard to the Millennium Development Goals (MDG). Unfortunately, the concrete results were rather modest owing to the monitoring and evaluation results carried out in the first decade of the 2000's. This was mainly due to the fact that indicators achieving the targets were too generic for concrete decisions at policy and budget levels, which led to modest implementation processes at various administrative levels. Nevertheless, evidently Finland learned from the MDG processes and, regarding the present SDGs, the processes can be considered to be more systematic and concise as well as sufficiently concrete for a successful implementation at all administrative levels: nationally, regionally and locally. However, the MDG processes had positive impacts in many respects, for instance, how to involve all the main actors locally in the processes and thus to strengthen the role of civil society in planning and decision-making. (GAIA, 2020 and Alhojärvi, 2021)

The implementation of the SDGs varies to a large extent at regional and local levels depending on the human and economic resources available for the respective processes. The government has published an overall implementation plan, the so called "Finland: Report on the Implementation of the Agenda 2030 for Sustainable Development", which is the leading document regarding this topic (Prime Minister's Office, 2020:8). Most ministries have designed their implementation plans and have integrated the targets in their strategies and planning as well as their budgeting processes. The main difference enabling a more comprehensive approach has occurred by replacing former sectoral approaches with cross- and multi-sectoral

approaches including clusters and increasingly the so-called phenomenon approach tackling dynamic and complex challenges and problem-frameworks such as climate change, immigration, multicultural society development, etc. National level of problem solving should be increasingly managed in an international context as the interconnections are so evident. (Report on the Implementation of the 2030 Agenda for Sustainable Development in Finland, 2020)

However, these types of new approaches are not yet common at regional and local level administrations and management practices. They have rather been tested and piloted at certain regions, which have developed their regional sustainable development plans with similar elements as mentioned for the government level, and in the largest cities. In most municipalities sustainable development approaches have been planned more traditional and the processes implemented somewhat slower. Nevertheless, there is an increasing number of municipalities that have designed their local sustainable development plans, which they apply also to budgeting and investment planning. This is particularly the case with these municipalities that have joined networks fighting against the climate change by fostering effective CO_2 measures. (Alhojärvi 2021)

Climate change, sustainable development and sustainability in tourism

The core issue between these dependencies is how the sustainability targets and objectives can be turned into criteria and indicators that can be assessed and measured so that data-based monitoring of the development paths can be created and followed systematically in sufficient reliability scales. In August 2021 Finland has gained more measurable achievements within the CO_2- and climate-monitoring than within the SDG monitoring at destinations and enterprises at local level. Nevertheless, SDGs have been used to develop criteria under the theme responsible tourism and business development at enterprise levels reflecting various targets of SDGs and the indicators leading to the targets. (CANEMURA & HINKU 2021, Alhojärvi 2021)

United Nations Framework Convention on Climate Change (UNFCCC) is the convention that builds the corner stone of the climate related strategies and policies in Finland. The main responsible ministry coordinating the relevant policies and actions at the government level is the Ministry of the Environment (MEnv). The main public organization coordinating and monitoring the relevant actions and activities is the Finnish Environment Institute (Suomen ympäristökeskus, SYKE).

Finland's overall objective has been to reduce greenhouse gas emissions nationally by 39 percent by 2030, compared to the level of 2005. This objective concerns the shared efforts by sectors which are not involved in the emissions trading scheme, i.e. transportation, agriculture, heating, machinery, F-gases and waste-management. However, as a result of the deepening negative atmospheric development, the national target has been modified so that Finland aims to be carbon neutral by 2035 and carbon negative soon afterwards so that the emissions would be smaller than the sinks in Finland. The means to achieve this target include new decisions on climate policy and nearly emissions-free electricity and heat production by the end of 2030s, as well as reducing the carbon footprint of buildings, promoting a circular economy, and a climate-friendly food policy. In taxation, the focus will shift even more to taxes

on environmentally harmful activities. The recent ambitious EU and Finnish climate objectives imply that they also concern sectors such as the land use, land use changes and forestry (LULUCF). These sectors have also direct linkages and dependencies with the tourism sector and cluster in Finland as the Finnish tourism is strongly based on conservation and sustainable use of nature and renewable natural resources. (Ministry of the Environment 2021)

Measures for mitigating the emissions of transportation

Outside the emissions trading scheme, the greatest emission reduction needs can be found in transportation, which currently causes approximately a fifth of Finland's greenhouse gas emissions. Transportation accounts for 40 per cent of the emissions of the sector outside the emissions trading scheme. The objective has been to halve the emissions from transportation by 2030 compared to the situation in 2005, but recent changes in the main CO_2 objectives have also increased the ambition levels with various sectors and modes of transportation. The emissions reduction potential remains to be greatest in road transportation. In order to mitigate climate change, consumption-based emissions, for instance, in travel and transportation, separate heating, and agricultural and horticultural production, must also be reduced. (Ministry of the Environment 2021, Finnish Environment Institute 2021)

Objectives of municipalities, regions and companies

The medium-term national climate policy plan gives emphasis on the role of municipalities in climate work, as the municipalities are responsible for public planning including road infrastructure, transportation, public transport, waste and water management, in most fields of infrastructure related planning and investments almost all of which have direct implications to tourist destinations and their sustainability.

Public procurements provide a viable opportunity to promote the objectives of the climate policy in the practical operations of the municipalities. A municipality can, for example, reduce emissions with energy solutions in buildings and heating facilities it owns, or by supporting its staff in adopting environmentally friendly operating practices, such as the Green office program. Increasing number of municipalities have drawn up their own climate strategies and programs, most systematically and target oriented within the so called **HINKU programme** managed by the Finnish Environment Institute, SYKE. When we assess the sustainability in tourism destinations, we can clearly distinguish linkages and correlation with measures and investments between the climate change and emissions mitigation and the sustainability criteria and indicators within environmental and energy as well as nature related criteria and indicators of sustainability of tourism. The data bases collected build also a reliable base to calculate CO 2 footprints at local and destinations levels. Green investments favor both the climate and the sustainability of tourism.

To obtain HINKU status, the municipality or region must meet the HINKU criteria specified by the Finnish Environment Institute (SYKE). HINKU criteria refer to the measures and policies that municipalities and regions adopted to combat climate change and through which they plausibly contribute to reduce the greenhouse gas emissions from their own operations and to influence other parties in their area in the contracts they prepare for competition of services procured or to be provided (local residents, companies, agriculture and forestry entrepreneurs

as well as secondary residents) in order to ensure that the efforts to reduce the area's greenhouse gas emissions aim at carbon neutrality.

Municipalities and regions that meet the HINKU criteria can call themselves HINKU municipalities and/or regions. Based on the local council's decision, the municipality undertakes to adopt measures aiming to reduce greenhouse gas emissions across its area by 80 per cent from the 2007 levels by 2030. At the region level the decision has to be made at the regional council or another regional actor with legislative base for such decisions. The regional goals equal to the municipal goals but the regions report to the regional authorities. More information on the process may be found at the following link: www.ymparisto.fi

The HINKU process described above started already in 2008 and by August 2021 80 municipalities and seven regions have been participating in it in Finland (see the map and the illustration following). This process has been linked with the CANEMURA project which is a process towards Carbon Neutral Municipalities and Regions which is co-financed by the EU-Life-Program. The regions have created road maps which they follow at regional and municipal basis. At the same time private companies have become more active and the funding sources have grown in numbers and revenues spent both in CANEMURA and HINKU processes (See: http://www.carbonneutralfinland.fi).

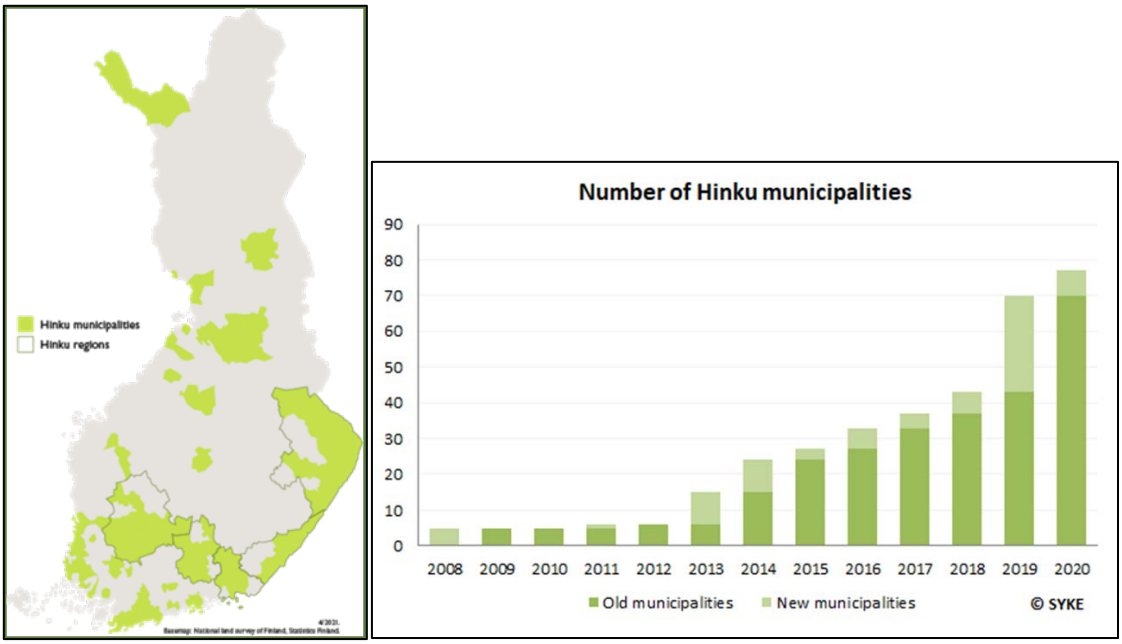

Figure 9: Location and number of Hinku regions and municipalities (Ministry of the Environment, 2021; Finnish Environment Institute, 2021)

It is evident that the commitment to the sustainability of tourism increases when the municipality and tourist destination share similar types of development goals and agree on future investments at the local level based on sustainability and CO_2 criteria, which are measurable and enable data-based management at local and regional levels. That is why there municipalities that are active both in the HINKU or CANEMURA processes aiming at CO_2 targets and in the sustainability development process of tourism aiming at certification within international certification systems (Green Destinations 2021). The destinations can even take an active role in HINKU processes at local and regional levels. HINKU and CANEMURA

strengthen the role of green investments and sustainability activities at regional, municipal and destination levels.

Nature conservation and biodiversity, protected areas

Finland has signed different international agreements on nature conservation and biodiversity, which are guiding the nature conservation work of the country and which have built the basis for nature conservation actions in Finland during the last decades. The agreements include: The Convention on Biological Diversity (1992), the Bern Convention (1979), the Bonn Convention (1979), the Ramsar Convention (1975), and the Helsinki Convention (1992). (Ministry of the Environment, 2021)

Furthermore, the decline in biodiversity will be halted by reforming the nature conservation legislation, increasing the funding for the protection of biodiversity and promoting the sustainable use of natural resources, nature protection and biodiversity conservation. (Inclusive and competent Finland, 2019)

The corner-stone in nature and biodiversity assessments are the national inventories using internationally acknowledged statistical and GIS methods But, due to an unbalanced data based management between forests inventories and those regarding flora and fauna the situation has led to implications for various types of nature ecosystems and even to conflicts how to value them, how and when to protect them and how to use them in a sustainable manner. This imbalance has had impacts also to the tourism sector as most of the tourism in Finland is based on nature and on the sustainable use of it. However, biodiversity is among the least analyzed factors when tourism is planned due to weaknesses in data-based management in non-protected ecosystems and due to a lack of knowledge and skills among professionals in the tourism sector. For instance, the sustainability criteria of Visit Finland include biodiversity as an indicator but in practice the respective tools used tackle the problem-area more comprehensively than presently. (Alhojärvi 2021)

On the other hand, biodiversity is assessed and taken into consideration more comprehensively in some selected international certification programs in the Finnish tourism cluster, such as the Biosphere program and the Green Destinations. These two mentioned schemes pay much more comprehensive attention to the state-of-art of biodiversity and nature protection in the sustainability context at destination, local and regional levels than within the national scheme(s) in Finland. Positive exceptions can be also found among national parks, nature protected areas such as Natura 2000 areas, as well as some private donations or city- based concepts such as the town nature parks. The assessments of biodiversity in these schemes prove that biodiversity should be taken more seriously into consideration and furthermore, carefully managed at all geographical levels and in various types of ecosystems using comprehensive data-based management tools. (Alhojärvi 2021)

Protected areas of various types build a sustainable basis for land use planning and management and for (sustainable tourism) sustainability of tourism in Finland. Nature reserves, wilderness areas and hiking areas established on state-owned lands are the central parts of the protected area system in Finland. Almost all of these are included in the European Union’s network of Natura 2000 areas. (Ministry of the Environment 2021)

Most protected areas are situated on state-owned land. State-owned protected areas are managed by Metsähallitus, Parks & Wildlife Finland. The protected area management principles are partly determined directly by national legislation and partly by Metsähallitus, Parks&Wildlife Finland as the landowner and site manager. Many of the principles are based on national and regional best practices that have been developed and agreed over the time. (Metsähallitus, 2021)

During the last decades Metsähallitus, Parks &Wildlife Finland has been active partner in the former PAN-Parks association and nowadays in the EUROPARC network, which have been the main international networks for national parks. The main approach applied in Metsähallitus, Parks &Wildlife Finland has been to have a selected number of national parks certified by an internationally acknowledged certification system and then transfer the same approaches and practices learnt to the rest of the national parks all over the country. (Metsähallitus, 2021)

More information can be found under the following links:

- Network of protected areas
- Number and size of protected areas managed by Metsähallitus
- Nature conservation areas in Finland (Ministry of the Environment, ym.fi)
- Hiking in the protected areas (nationalparks.fi)

Metsähallitus, Parks and Wildlife Finland, had also learnt from the history that sometimes, and gradually more often, some of the services would be more productive if they are provided from the private sector. At the moment in some national parks some of the DMO responsibilities are allocated to SMEs but the local management is under the Metsähallitus Parks & Wildlife direct control. (Alhojärvi 2021)

The national parks played a very important role in Finland during the COVID-19 period. National parks are located all over the country and the first ones, Pallas-Ylläs and Pyhä-Luosto, both located in Lapland, were established already in 1938 (Metsähallitus 2021).



Figure 10: Location of national parks in Finland (Metsähallitus, 2020)

The number of visitors increased by 20-40 % depending on the park, and the local and domestic visitors replaced largely the loss of foreign visitors in 2020-21 compared with 2019. The national parks survived economically much better than the tourist businesses in the same areas or regions concerned. Additionally, nature protected areas in cities and towns gained amounts of new visitors during the difficult times in 2020-21. It may be concluded that national parks gained such appreciation that used to be the reasoning to establish the first ones, and to develop them all around the country during the last 80 years. The leading principle has been that they are open all the time, all year around for everybody free-of-charge. However, during pandemic, the NP services centers have been closed in most of the parks due to health reasons and virus management control practices. (Metsähallitus2021)

All the main contacts needed to visit and survive in national parks are provided via internet, and the same applies to other protected areas managed regionally or locally by the municipal administration or private landowners. For example, Metsähallitus, Parks & Wildlife Finland provides services for individual visitors to visit the Finnish nature by www.luontoon.fi website, which can be used for planning a trip or visit either prior or during ones stay, e.g. while hiking. The portal can be used, for instance, for seeking destinations, as an outdoor guide or seeking for game and fisheries services. Besides nature attractions you may link yourself with Finland's World Heritage Destinations. Hiking and recreational services are supported and enabled also by an enabling everyman´s rights concept which allows all visitors to walk and hike in all types of land and waters (excluding the restrictedly protected areas) as long as respectful behavior is applied. (Metsähallitus 2021)

The number of professional guides and their qualification and skills has risen independently of their business format due to high quality of curricula development for nature services in Finland. Nevertheless, it might be less common to find English speaking nature guides in private lands than in publicly owned lands; or vice versa. Usually the websites that are in English or other foreign languages is a reliable sign of this aspect. (Alhojärvi 2021)

Tourism planned and implemented in the Same people living areas has seldom been fully in balance with the needs and wishes of the indigenous people so far, yet Lapland is one of the most popular regions with attractions. The *Same* people claim that often the tourism executed in their lands is not respecting the original basic and property rights and thus potential and concrete conflicts may prevail. (Alhojärvi 2021)

Finland has not had an official national strategy how to implement the UN Declaration on the Rights of Indigenous People, UNDRIP (2007) in practice. As there is a lack of full agreement between the State and the indigenous people official administrative organ, Saamelaiskäräjät, the situation has had reflections also to tourism and other land and water uses in Same areas in Lapland. (Memorandum by the Saamelaiskäräjät, 2020)

However, now there are serious preparations in the Prime Minister's Office that such a strategy paper could be introduced to the Government and the Parliament soon in the future. Owing to the prevailing complexity of ownership and rights topics, Visit Finland has not been able to solve the disputes and other prevailing problems related to the sustainability of tourism in the *Same* areas.

If evaluated sustainability of tourism in *Same* living areas the challenges in socio-cultural aspects do not favor certification of the sustainability of tourism in the Same areas. Nevertheless, these types of topics should be assessed and evaluated by an independent international recognized certification scheme, such as the Green Destinations, as this type of certification schemes provide guidance how to create development steps using participatory methods to meet the final sustainability targets.

In the map of national parks the six northern most national parks are located above the Arctic Circle but usually the potential and acute disputes between the *Same* and Finnish cultures occur outside the areas of the national parks. (Alhojärvi 2021)

4.8.1.1 National Sustainable Tourism Policies and Strategies

Finland's tourism strategy for 2019-2028

Achieving more together – sustainable growth and renewal in Finnish tourism' is the name of Finland's prevailing national tourism strategy for 2019–2028. The strategy defines targets for the development of tourism until 2028 and measures to be conducted between 2019 and 2023. Owing to the strategy Finland aims to become the most sustainably growing tourist destination in the Nordic countries. Furthermore, tourism is developed as a responsible and growing service business that generates welfare and creates jobs across the whole country (Ministry of Economy and Employment 2020).

Finland's updated tourism strategy identifies four priorities that will facilitate the sustainable growth and renewal of the tourism sector:

1. supporting sustainable development
2. responding to the digital transformation
3. improving accessibility, taking into account the needs of the tourism sector
4. ensuring an operating environment that supports competitiveness.

Finland's tourism strategy was published in 2020 just before the COVID-19 epidemic escalated into a pandemic. The objectives and measures of the strategy have been adjusted due to the unforeseen situation, but the priorities have been maintained. Investments in the sustainability of tourism and the digitalization of the sector are estimated to play a key role in promoting Finland's attractiveness as a travel destination even after a pandemic period. The present tourism strategy and its action plan are available online: Achieving more together – sustainable growth and renewal in Finnish tourism. Finland's tourism strategy 2019–2028 and action plan 2019–2023.

Tourism demand is one of the key measures of the tourism strategy. The estimated effects of the COVID-19 pandemic on Finnish tourism demand have been published since May 2020 (COVID 19). These estimates describe the effects of the coronavirus on tourism in Finland as a whole. The most recent ones show that since spring 2021 the recovery of the sector has been fast because of the focused marketing to Finnish citizens resulting in the strongest increase of domestic travel and tourism in the 2000's. Domestic visitors have replaced foreign ones to a large extent in 2021 compared with 2020. Similarly travel patterns have changed from flying to

other means of public travel particularly towards railways. Furthermore, the role of local tourism has become more important (Visit Finland 2021).

Finland has opened the frontiers slowly internationally as to safeguard the management of the COVID-19 epidemic. The health authorities have streamlined the governmental resilience strategy to a great extent and the tourism sector has been the most active sector to resist strict regulations and the slow opening of the society for visitors in Finland (Ministry of Economic Affairs and Employment 2021).

The opening decisions of the society by the government took into account the tendencies and fluctuations of the epidemic at country and specifically at regional levels of the society. As a result the recovery of the tourism sector/cluster has been faster than in the events sector or the cultural sector as a whole (Ministry of Economic Affairs and Employment 2021).

Joint guidelines for developing the tourism sector

The cross-cutting theme of the official tourism strategy is cooperation, which is essential for achieving sustainable growth and renewal in Finnish tourism. The tourism strategy serves as a joint guideline for all the main actors including tourism operators in the development of the tourism sector. Actions are planned emphasizing intersectoral collaboration amongst a wide range of operators. The actions are monitored by a national horizontal expert group on tourism, coordinated by the Ministry of Economic Affairs and Employment (MEAE).

The strategy is based on the Roadmap for growth and renewal in Finnish tourism 2015–2025, Finland´s former tourism strategy, which was introduced in January 2015 and updated in 2019 under the coordination of the Ministry of Economic Affairs and Employment (MEAE) within the Government of Finland. The aim of it was to enable Finland to become the number-one tourist destination in Northern Europe by 2025. It laid the base for the present strategy, so it is useful to have a glance on it also in this context.

The strategic priority areas of the roadmap for 2015-2025 were as follows:

- Strengthening theme-based co-operation between tourist centres and networks of tourism enterprises, as well as new openings in product development, sales and marketing
- Developing competitive and comprehensive offerings from the interfaces of tourism and other fields
- Increasing the effectiveness of marketing activities and making the travel services easier to buy
- A competitive operational environment for tourism that supports growth and renewal of it
- Easy accessibility both by digital means and physically

Three special development and investment programs were created, namely:

- Finrelax – Turning Finland into a top country of wellbeing tourism
- Finnish Archipelago – Making the Finnish archipelago internationally known
- Finland Stopover – making Finland a leading stopover country. (Ministry of Economic and Employment Affairs 2015)

The main paradigm concerning tourism was upset by a process where the former strategy was assessed and a new was designed. The paradigm was transferred from sector to cluster approach that emphasizes the close relationships and dependencies of tourism with the collaborating industries. The Finnish cluster approach is more comprehensive and holistic one than the sectoral approach and it clarifies more concisely the different roles of the enabling public organizations internationally and nationally. This approach supports adequately the Finnish commitment to to meet the targets. This type of division and conceptual clarification is very useful at all public management levels to plan, for instance, the relevant investment plans more efficiently at national, regional and local levels and strengthens the public-private partnerships in practice.

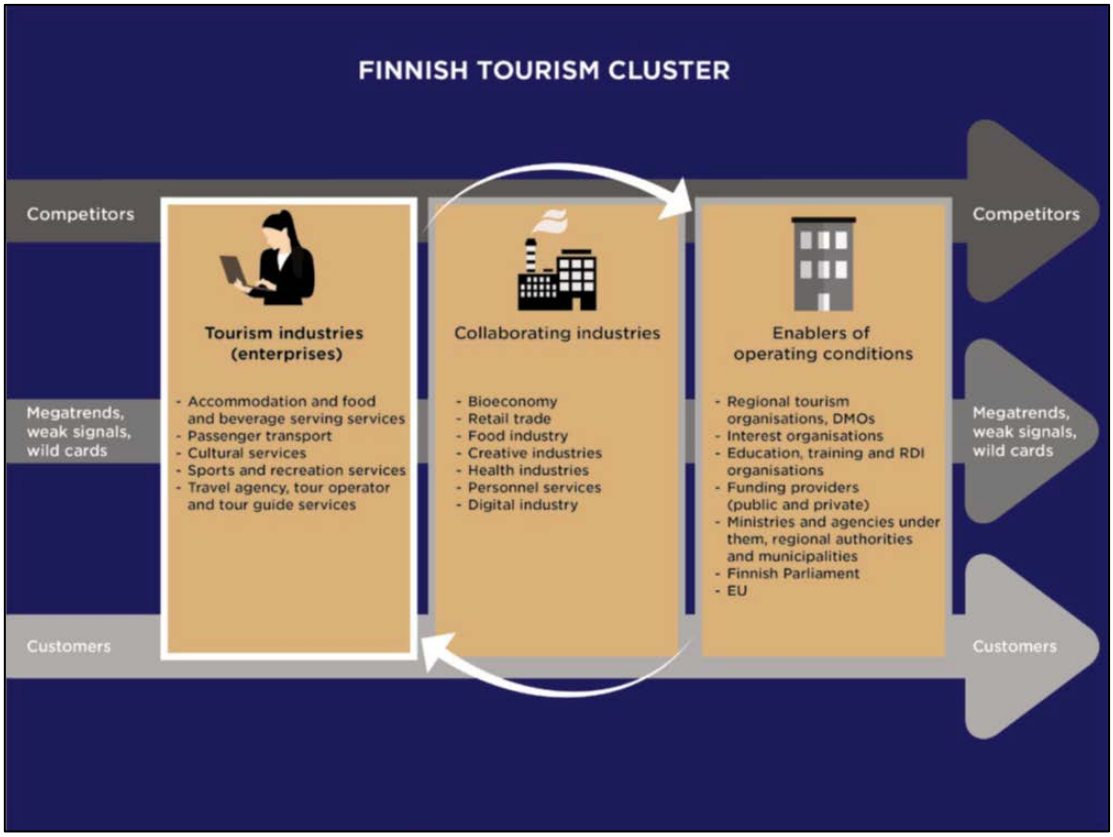

Figure 11: Finland's Tourism Strategy (Ministry of Economic Affairs and Employment, 2020:18)

4.8.2 Key Stakeholders

4.8.2.1 Governmental and semi-governmental bodies

The roles of Finnish public organizations enabling the tourism development can be described as follows:

The public sector's including the Prime Minister´s office and sectoral ministries*; Metsähallitus*, Parks&Wildlife Finland, Regional Centres for Economic Development, Transport and the Environment (*Elinkeino- ja aluehallintovirastot*); 21 regional councils (*maakuntaliitot*), 310 municipalities (*kunnat*) primary roles include:

- creating a predictable and competitive operating environment that supports sustainable growth in tourism (legislation, equal conditions, public authority control),

- providing appropriate enterprise and other actor development services and funding instruments,
- investing in the infrastructure of tourism areas, national parks and culture and nature sites including transport and telecommunications connections, water and sewerage systems, roads, waste management, promotion of energy efficiency, routes and other service amenities,
- promoting the strengthening of Finland's commercial country image,
- supporting research, development and innovation activity, and
- promoting long-term and systematic development cooperation at different levels to ensure growth (Ministry of Economic Affairs and Employment 2020).

The **Ministry of Economic Affairs and Employment** (MEAE) is responsible for designing the priorities of Finland's tourism policy and coordinates the development in coordination with other Finnish ministries and actors in the tourism sector. The coordination comprises also development work with other ministries, for instance, in the field of creation sectoral road maps and plans to elaborate more specifically tourism strategic implementation in specific sectors such as rural development and food tourism with the Ministry of Agriculture and Forestry and cultural tourism road map with the Ministry of Education and Culture (Ministry of Economic Affairs and Employment 2021).

Additionally, the **Ministry of Environment** (MEnv) is responsible for coordinating sustainable development and the environmental policy in Finland and for instance mitigation of CO 2 emissions policy and measures among its other duties and responsibilities within the Government structure in Finland. It is also managing the nature conservation policy and the state-owned enterprise **Metsähallitus** in respect of protected areas in Finland.

Metsähallitus, Parks&Wildlife Finland is a state-owned enterprise with one of its main tasks to manage most of the protected areas of Finland. Metsähallitus, Park and Wildlife Finland is nowadays the largest employer of SMEs regarding recreational services and protected areas in Finland. Most of the experts and other staff working in national parks or local nature protected areas are entrepreneurs, SMEs or individual experts who provide services via Metsähallitus to visitors and tourists. Most of these services were earlier, till early 2000's personnel of Metsähallitus, but because of EU competition directives related to markets, the approach of the organization had to be updated and changed.

The websites of Metsähallitus, Parks&Wildlife Finland are also in English. There is text also in same languages, which are the mother tongues of the indigenous people living in northern Finland, Sweden, Norway and Northwest Russia.

4.8.2.2 Tourism Associations

The main coordinating public organs in the tourism cluster are Business Finland and Visit Finland. **Business Finland's** duty by law: "Act on Innovation Funding Centre Business Finland and the Limited Liability Company Called Business Finland" include to enable businesses to renew and develop themselves by means of technologies and innovations, to promote international networking, to increase exports and foreign investments to Finland, and to increase inbound tourism to Finland. Business Finland's duties include:

- promotion of the development of innovations, new technology and business,
- promotion of the targeting of foreign investment into Finland,
- promotion of research, development and innovation activity and extensive utilization of its results in businesses; carrying of responsibilities for the funding of the production incentives for the audiovisual industry.

Business Finland is the main organization and actor in the tourism cluster that binds the enabling environment, particularly the public sector organizations, and the tourism industries and collaborating industries in a coordinated manner with strategic development goals and means into the practical measures to meet the national and regional goals.

Visit Finland being a subsidiary of Business Finland is the key organization coordinating the implementation measures of the tourism development. The main tasks of Visit Finland include:

- conducting Finland's commercial country image marketing in the selected target markets,
- offering tourist destinations and enterprises opportunities for product marketing and sales promotion channels,
- steering, coordinating and sparring the development of product supply to meet demand,
- conducting studies and market surveys and analyzing research data for use by tourism actors,
- operating in good and active cooperation with enterprises, regional organizations and other actors involved in the greater region's cooperation,
- providing steering and advice for marketing and development projects in cooperation with regional and development organizations,
- ensuring the operational resources of Visit Finland's representatives abroad (Ministry of Economic Affairs and Employment, 2020).

Regional tourism organisations play a key role as developers of tourism in their respective regions. Finland has approximately 70 regional tourism organizations whose operating methods and geographical coverage (such as city, municipality, region) vary. As the operating environment differ, the tasks of the regional organisations have also been modified from formerly dominating marketing measures in recent years.

Nowadays regional organizations provide sparring for digitalization, observe the quality of services and enable implementation of regional development strategies. The tasks are increasingly planned and agreed on the basis of actual needs at municipal and local levels with the destinations and various actors. The roles of regional tourism organizations include:

- serving as a cooperation forum for tourism actors in their operating area, as an information provider and tourism adviser,
- coordinating and compiling, in cooperation with entrepreneurs, the region's tourism offering into more saleable product entities,
- organizing joint marketing of tourism in the region and ensuring unbroken tourism service chains,
- acting as a link between Visit Finland and entrepreneurs.

Regional development companies have roles including:

- being responsible for developing services (such as business advice) supporting the business and other type of development of enterprises operating in the region,
- promoting investments to be attracted to the region,
- contributing to the management of tourism projects and ensuring that the development objectives of the projects managed match the needs of the region's tourism industries and the regional tourism organization (Ministry of Economic Affairs and Employment, 2020).

4.8.2.3 Relevant research and educational bodies

Tourism cluster development is dependent largely and increasingly on relevant research and development including innovations in the cluster and within collaborating sectors and clusters. These clusters comprise some of the main public research institutes such as the Natural Resources Institute (NRI, Luonnonvarakeskus); the Environment Institute (SYKE - *Suomen ympäristökeskus*); Finnish Meteorological Institute (*Ilmatieteen laitos* - IL); Geological Survey of Finland (*Geologian tutkimuskeskus* - GTK); Metsähallitus, Parks&Wildlife Finland; Finnish Heritage Agency (*Museovirasto*); and Statistics Finland (*Tilastokeskus*). These institutes and organisations are, besides their major responsibilities and duties, also active in research and development work that influence the tourism cluster. Finland does not have any state organization responsible solely for tourism cluster and research related to it. However, all the organisations and experts conducting surveys and studies in public and private institutions as well as NGOs have a joint forum for research for travel and tourism, called association for *Matkailututkimus*. It is also among the main organizers in the annual seminars of research and studies on tourism, organized in January in Helsinki, when the travel and tourism fair is organized. It is also the main event where research and study results are introduced and discussed with all main stakeholders and the media. In 2021 the fairs were cancelled unfortunately due to pandemic (Alhojärvi 2021).

There are several universities and universities of applied sciences that conduct research and studies in tourism and also provide educational curricula with various grades and continuing education in various fields and specializations of tourism. Furthermore, Finland has a variety of institutes of professional and vocational education and training that provide relevant curricula for various expertise and jobs applied in tourism cluster as well as continuing educational curricula (Alhojärvi 2021).

The roles of **research, education and training organizations** operating in the tourism cluster primarily include:

- responsibilities in tourism education and training and for competence development and studies towards qualifications or degrees and by continuing education in response to changing competence needs,
- participation in the implementation of their region's continuing education and retraining for tourism,

- responsibilities for producing high-quality research data to promote sustainable growth and renewal of tourism as well as for promoting the dissemination of research data supporting tourism development,
- to contribute as experts and administrators to the region's research and development projects and to ensure that the development objectives of the projects administered and managed match the needs of the region's tourism industries and the regional tourism organization,
- to integrate their actions and activities with the national strategic tourism needs and targets (Ministry of Economic Affairs and Employment, 2020).

4.8.2.4 Individual tourism business and destinations of particular relevance

Tourism enterprises have roles such as: responsibilities for the development of their businesses (such as product development, service design) and competences, responsibilities in selling and marketing their services as well as participating in the activities of the tourism network in the region concerned (MEAE 2020).

In this context one could introduce two excellent destinations that have been active within the national and international development schemes. The most successful one is the **Fiskars Village**, located in southern Finland. It received a gold level award within the Green Destinations Award and Certification program in 2019 and additionally won the third place in the sustainability competition in Europe the same year. In 2020 it received the global nomination as the leading destination regarding nature and culture which led to the first prize in this category in ITB in March 2021. The main strength of Fiskars Village can be found on their holistic performance of sustainability dimensions supported by successfully organized participatory method in planning and developing the services provided. The village has been constructed in the facilities and sites on an industrial estate that has been transferred into a preserved entity with modern services provided to inhabitants and visitors.

The other destination gaining national and international success is the **Posio destination** located in the Arctic Circle in Lapland. It received as the first destination the Visit Finland sustainability competition award being the most sustainable destination in Finland in 2020. This achievement was due to the fact that over 51% of SMEs in Posio had received Sustainable Travel Finland (STF) certificates which led to the awarding as a sustainable destination. Besides, the conscious SMEs Posio has numerous arctic hills and small mountains where you will meet silence, original and typically well-preserved nature, national park and an internationally well-known cultural center.

Posio received also the nomination to be among the TOP 100 destinations in the global competition of the Green Destinations scheme in Green Destinations Days and Conference in autumn 2020. The good practices and performances of sustainability of these destinations can be studied in the http://www.goodtravelguide.com. The most advanced SMEs within sustainability can be studied in the websites of http://www.Fiskarsvillage.com and http://www.posio.fi.

4.8.3 Activities and instruments for the development of sustainable tourism

4.8.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Sustainable Travel Finland (STF)

The Ministry of Economic Affairs and Employment in Finland which is responsible for coordinating Finland's National Tourism Strategies 2019-2028 has acknowledged `Supporting Sustainable Development` as their top priority to achieve sustainable growth and renewal of the Finnish Tourism Sector. In this context Visit Finland launched in June 2020 the `Sustainable Travel Finland` program which was designed on the base of the assessment of national and regional development needs to assist the tourism industry to adopt more sustainable practices.

The STF program aligns with the UN SDGs and its internationally recognized sustainable tourism programs and includes all dimensions of sustainability, namely ecological, cultural, social and economic. It is a free of charge program that provides companies and destinations with a 7-step sustainable development path through its online platform to adopt sustainable practices and choices.

The seven-step development path of Business Finland/Visit Finland comprises the following steps: 1. Commitment; 2. Increasing know-how; 3. Development plan; 4. Responsible communication; 5. Certification & Auditing; 6. Verification and measurability; 7. Agreement & Continuous development. The program comprises tailor-made training courses, online manuals and a digital working environment to reach the qualification for the Sustainable Travel Finland label. (See also chapter 4.1.3.3.in this report on tourism sustainability certification systems and awards).

4.8.3.2 Marketing and information services supporting sustainability in tourism

Visit Finland plays the key role in coordinating marketing and information services supporting sustainability in tourism.

Business Finland and Visit Finland provide wide range of market and marketing surveys to targeted markets, analyses of business environments and concepts, statistics, for instance, on foreign investments into Finland, information on appropriate international and national funding mechanisms and financing sources as well as provide continuously analyses of international travel. Recently they have become active in piloting CO 2 calculating methodologies for travel in selected cities in Finland. Typically, their studies and reports are available for their customer's free-of-charge or with limited costs, but usually they are not tailor- made, but anyhow targeted to certain target groups. SMEs can typically use these studies in general planning or as professional guidance, but more seldom for planning the specific business measures for their own use.

In addition, there are some universities such as the University of Eastern Finland and the University of Lapland that provide intensive courses and curricula in these fields as well as some universities of applied sciences such as Haaga-Helia that are performing strongly in the topics of sustainability. The list of universities and of applied sciences can be found at the website of Visit Finland.

Materials and information systems of the cultural environment managed by the Finnish Heritage Agency

The Finnish Heritage Agency stores information on cultural environments and their protection. The register of archaeological sites forms the largest data set, but information is also stored on built environments, world heritage sites and on e.g. archaeological projects. The best way to explore the information is via the Cultural environment service window. The service window also contains archive materials related to the cultural environment.

The Cultural environment service portal

In the Cultural environment service portal it is possible to explore the materials maintained by the Finnish Heritage Agency related to e.g. protected archaeological sites and other archaeological sites, buildings and built environment. Additionally, the service portal contains information resources on activities related to the cultural environment. Also, some of the data of the archives of the Finnish Heritage Agency related to the cultural environment is accessible via the Cultural environment service portal.

The service portal also contains a map application through which it is possible to search and view the location of the sites on the map. The map application can also be accessed directly from https://kartta.museoverkko.i.

4.8.3.3 Tourism Sustainability Certification Systems and Awards

The STF label is only awarded for those companies and destinations that have undergone the entire STF program and fulfilled the criteria. For destinations, 51% of the tourism companies must have at least a certificate from a list of certification schemes acknowledged by the STF label, such as Biosphere, ECEAT Finland, ECOCOMPASS, EU Ecolabel, Green Key, Travelife, ISO 14001. In August 2021 there are 110 businesses and 47 municipalities with companies that have been awarded with these labels.

However, an increasing number of destinations claim for international certification based on international recognition with a third-party auditing as a destination, which is currently not possible within the STF/Visit Finland.

There are destinations that are nowadays managing their sustainable tourism development processes with the Green Destinations in Finland. Green Destinations is an international award and certification program which was established by the non-profit Green Destinations Foundation, European Centre for Eco- and Agro Tourism (ECEAT) and the Coastal & Marine Union (EUCC) in 2014. It is a Global Sustainable Tourism Council (GSTC)-accredited certification organization that certifies destinations based on its Green Destinations Standard.

The GD in Finland is linking the destinations to collaborate closely with the municipalities and regions emphasizing the green investments into the infrastructures required for changing traditional development patterns towards measurable sustainable investments and linkages with national and regional CO_2 targets. The GD programs lay an emphasis on social and cultural factors more thoroughly than other international tourism certification programs and allocate comprehensive measures to environmental and land-use factors including preservation of the biodiversity in different types of ecosystems (Alhojärvi 2021).

Sustainable regional and local development correlates deeply with atmospheric development and changes and mitigation of the CO_2. Finland is among the leading countries in Europe and in the world in this respect. Without green investments and other systematic climatic measures, SDG goals and targets cannot be met locally, regionally, nationally or internationally.

4.8.4 Summary and conclusion on national situation

The development process in sustainable tourism has shifted from sector-based approach to cluster based one during the last years in Finland. This change will increasingly broaden the sustainability concept of tourism towards other sectors and clusters that have natural connections to more holistic approaches including green investments. So far we have reached this state-of-art by changing paradigm from sectoral approach towards cluster approach. Investments link tourism cluster more firmly than before to the international development policies and the tourism is integrated more closely into the infrastructural plans and investments to implement the plans. These plans and investments are integrated with local and regional sustainable development plans and investments as all sectors and clusters require sustainable infrastructures and solid business environment.

The development of tourism has mostly been developed in national concepts and systems, but the evident tendencies strengthen the dependencies and interrelationships between national and international concepts and systems. The sustainable development and the sustainable cluster development should be directed towards the same sustainability targets and the development processes that need to be certified with international certification schemes at cluster, destination and enterprise levels in the framework of local and regional development.

Finland is currently in the position where national concepts have to be transferred and integrated into international ones. As a result, all systematic sustainability paths are required to lead towards the same sustainability targets also in practice, at all levels mentioned. This is the way how Finland can meet its sustainable SDG and CO_2 targets while preserving the biodiversity and the nature ecosystems.

At the tourism level, the recent evaluation of Visit Finland has succeeded in creating an attractive travel destination in Finland, supporting Finnish tourism companies in the international markets and developing the tourism ecosystem in Finland. Evaluation results show that companies find Visit Finland's operations useful. Almost all companies felt that Visit Finland's operations benefit the entire tourism industry. Visit Finland's services are considered to be of high quality among international marketing partners. (Business Finland 2021). Evidently it seems that lessons learnt have been successful. But is that enough for the dynamic future needs of sustainability targets? Can Finland continue in the same path, or should there be additional dimensions and directions to be taken into account for the sustainability requirements?

4.8.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The ambitions and core achievements can be assessed and measured by the tools and certificates that Business and Visit Finland provide. At enterprise level the STF system including international certificates is evidently a good basis to measure the achievements, to plan the next steps as well to monitor the development paths planned and taken. So far, this process has proven to be sufficiently satisfactory as it is based on internationally acceptable and recognized certificates. However, at destination level it is only a partial method as the destination management and the infrastructural and other investments are less emphasized and evaluated. Nevertheless, these factors do make the difference within sustainability contexts. It is evident that the upgrading of the present system should commence as soon as possible. The changes towards increased sustainability could become structural if the cluster based development processes can be linked and integrated with general local and regional sustainable development efforts, and emerged with them. This is the way how the impacts of development measures will grow faster and more solidly than ever before. The SMEs can be among the front runners, or stay behind, in the processes, as they wish.

4.8.4.2 Challenges for the development of sustainable tourism and for SMEs

The main challenges can be identified externally from the planning and decision-making mechanisms at regional and local geographical levels, namely at municipalities and regional administrations, and their willingness and commitment how to foresee and plan the future. Some politicians can be real obstacles or hindrances as they do not understand enough sustainability concepts and their responsibilities how to support the sustainable development by political decision making on investments and other choices in practice. This one reason why tourism specialists and experts should be active at the societies they live and work. This challenge can be tackled by flexible but firm behavior and use of participatory discussions and planning methods.

Often the challenges are met in the municipalities because of the poor economic situation of the local economy and/or non-favorable demographic structure or the population. These factors create the most common obstacles and hindrances in present planning and decision-making in the municipalities. The other unfortunate factor can often be found in rather modest scale of expertise and the state of human resources at local level. Very often these types of hindrances can be overcome, at least partially by attracting newcomers or returners to the municipality for personal or business reasons. The motivation of such inhabitants is decisive in developing the business, the destination and the municipality. Enabling environment at the regional or municipal level is decisive when turning the interest of these new inhabitants into creative inputs for the future development efforts.

Finland has a wide grade of educational services all over Finland and digital learning is nowadays very appropriate and effective method to improve the competences and skills within the tourism cluster and beyond it. Motivation is decisive also in this type of challenges. Another challenge could be found in the financing of investments or business development, but there are a vast number of potential funds available. One should study the options not

only within the core business area, but also the neighboring sectors or field of businesses, which could be used to support the core business area outside from its mainstream.

4.8.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

Owing to OECD, Finland was among the countries that managed to transfer major part of the work inputs from office and other near-by work mode to distant work. This transfer was also rapidly, within one week decided and executed among majority of the population including school children since covid-19 turned to the pandemic in Finland. Evidently there were problems that prevailed for weeks, but the transfer was very fast and efficient. This was due to the high rate of digitalization, owing to OECD. Pandemic raised accordingly the rate of digitalization and led to transition of near-by work to distant one. Civil servants have been in the mode of distant work since mid- March 2020 till the end of October 2021, without any interruption. Only rare visits with preventive measures have been permitted to offices.

At the moment it seems, that all civil servants in the public sector will pilot and then adopt the hybrid working methods, by combining distant and near-by work at offices so that there will be mixes used to divide working weeks between distant and nearby working days. The industries and businesses will most likely use same type approach in their fields of businesses in the future if found appropriate.

Educational sector and particularly pre- and primary schools stayed to some extent at nearby caring and learning but secondary and gymnasium levels worked mostly in distance, using digitalized systems and tools. At present there is a strong wish to keep the kindergardens and primary schools open, and also the secondary and higher level of schools and educational entities.

Similar phenomena took place in tourism. Recreational and protected areas nearby people's homes gained popularity and preference compared with travel to domestic and international distances. National parks and other nature protected areas became much more popular than for decades. Visitors to national parks increased by 20-40% in all the parks from 2019 to 2020, owing the Metsähallitus, Parks&Wildlife Finland. This occurred yet almost all the services provided by SMEs and guides at national parks were shut down during the pandemic.

It is quite common among Finnish households to own free-time houses or cottages in the countryside in addition to their apartment or house typically located in city or other populated area. The pandemic increased the rate of working in distance from the second house owned or as rented. Thanks to the high rate of digital networks the conditions were sufficiently good enough from technological and accessibility points- of-view and often healthier as you could control yourself very well the living and working conditions in your cottage. This tendency also increased consumption of local food and other ware, and outdoor recreational activities became popular.

When the society has been gradually opened, based on national regulations, and regional decisions of regional centres (ELY and AVi-keskukset) the consumption of local services including tourism has recovered. However, the tourism sector has been complaining very loudly about their situation, which is many cases has been dramatic, with upset and bankrupts

of businesses being common. Nevertheless, the Ministry of Economic Affairs and Employment organized rather fast state subsidies for the companies in the tourism cluster, with better rates and faster than the case has been with the enterprises in cultural sector or cluster or within events. This type of assistance has also partly originated from the EU sources.

In August 2021 the situation is not in balance yet, neither from the consumers or visitors' points of view, nor from the businesses. Unfortunately, the pandemic has diminished to some extent the importance to think and act sustainably in practice as SMEs still facing serious economic problems or challenges usually select the least expensive way for survival and investments: the sustainable choices are not always in the top of the priority lists when economic inputs are required from the SMEs. Of course, there are companies typically with good balance sheets that have been able to renovate and upgrade their facilities as there has been relatively good availability of employees with good professional skills for safe and healthy work in small construction units and sites. In respect of digitalized services, SMEs have had more time to develop digital services more than before and for instance, the digital marketing has been developed fast and digital products have been upgraded. SMEs that provide their services only by near-by activities, have suffered seriously, but their situation has been improved by domestic visitors in most places previously visited by foreign groups.

Pandemic has led to development of virus-free passports and labels not only for visitors but also for the service providers within the Visit Finland and Green Destinations. Most likely these types of health and safety related labels or passports will become common, and they will be required in the future, particularly with pandemic or other health hazards.

4.8.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Finland is a country where data-based management is increasingly used in tourism development. This is particularly case in sustainability topics. The boosting period from tourism to sustainable tourism within Visit Finland has been very fast, taking into consideration as the concept of sustainability was integrated in the of tourism only 3-4 years ago by the services of Visit Finland. We can prove in practice and by experience by comparing sustainable productions methods in forestry, agriculture, fisheries, water topics, construction materials etc. that the future can be found among sustainable production and manufacturing methods rather than among the conventional ones. Data-based management already shows now that sustainable investment and other actions to the services sector, like tourism is the corner stone for longer-term planning and development of the tourism sector and cluster. Development of digital solutions is nowadays very fast globally and in Finland. Most likely the digital platforms and their use will become more common, and they will replace and change the various types of conventional and traditional travel and tourism modes and formats; virtuality in tourism will gain dynamically market shares among many target and consumer groups and the changes will be increasingly faster and more dynamic if pandemic periods continue, which unfortunately seems to be evident in the future.

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4.9 France

Francesca Cominelli
(As of July 2021)

4.9.1 Political framework for Sustainable Tourism

4.9.1.1 National Sustainable Tourism Policies and Strategies

The **National Tourism Strategy** in France is the responsibility of two Ministries: the Ministry of the Economy, Finance and Recovery, Directorate General for Enterprises, Sub-Directorate for Tourism (*Ministère de l'économie, des finances et de la relance, Direction Générale des Entreprises, sous-direction du tourisme*) and the Ministry of Europe and Foreign Affairs, Mission for the Promotion of Tourism (*Ministère de l'Europe et des Affaires Etrangères, Mission de la promotion du tourisme*), because of its vocation to develop and coordinate France's relations with foreign countries. In the same way, the public funds allocated to tourism are divided in 2020 between two main programmes:

- Programme 134 "Business development and regulations" of the "Economy" mission (*mission « Économie »*);
- Programme 185 "Cultural diplomacy and influence" of the "External action of the State" mission (*mission « Action extérieure de l'État »*).

It may seem surprising that a sector as strategic and complex as tourism is not coordinated at the national level by a dedicated ministry and does not have a specific strategy. This can be explained by the transversality of tourism and its tight relation to multiple issues, not only economic, but also cultural, social and environmental. However, the lack of central coordination can lead to a fragmentation of interventions.

Since 2013, considerable efforts have been made to provide this sector with a strategic plan. On 26 November 2013, the Prime Minister opened a national conference (*Assises du Tourisme*) that has been a special occasion for raising awareness and consulting the actors of the French tourism industry and, more broadly, the population on the issues concerning this sector. The professionals involved, both public and private, as well as local authorities, worked on nine themes: encouraging the emergence of new destinations; diversifying the tourism offer; developing a strategy for tourism events and business meetings; improving the quality of reception; making the tourism professions a sector of excellence; encouraging investments to strengthen the attractiveness of the offer; federating and enforcing the role of public authorities in favor of tourism; adapting the tourism sector to the changes in the sector; strengthening French tourism.

At the end of these consultations, in June 2014, the Minister of Foreign Affairs and International Development, Laurent Fabius, announced 30 concrete decisions aiming to increase the annual number of visitors from 83 to 100 million and above all to permit France to regain its leading position in terms of incomes. The announced measures were divided into 5 areas: a quality and diversified tourist offer; an improved welcome; digital technology at the heart of tourism, training development and widely accessible holidays. As it can be easily seen,

none of these priority areas directly mentioned the issue of sustainable tourism. Concerning the 30 decisions, it is the concept of excellence, innovation and competitiveness that are highlighted. For example, decision number 1 concerns the implementation of five centers of excellence (where only one is dedicated to ecotourism / itinerance), number 2 aims at creating a funding program with the priority of sustaining innovation and competitiveness of the tourism companies. Further on, number 21 sustains the development of internet services for tourists and number 23 supports tourism stakeholders in the digital transition.

Thus, in 2014, France announces the target of 100 million visitors per year, without adopting for the tourism sector any concrete measures that clearly mention the notion of sustainable development. This does not mean that actions in favor of sustainable tourism are not being carried out at national, regional and local levels; nevertheless it is interesting to underline the absence of the sustainable tourism common “vocabulary” in the strategic axes and concrete measures announced by the government. At the end of this period of national debates and meetings, it is also considered to set up a council for the promotion of tourism which will be responsible for defining, in consultation with the actors of the sector, a Tourism Plan for 2020.

Established in July 2017, the Inter-ministerial Committee on Tourism (*Comité interministériel du tourisme* - CIT) chaired by the Prime Minister brings together every six months the ministers concerned, elected representatives and tourism professionals. This body establishes the priorities and actions to be implemented in order to move the sector forward. The first CIT focused on issues related to the safety of tourists, following the terroristic attacks of 2015 (CIT, 2017). This CIT, which took place in 2017, the International Year of Sustainable Tourism for Development, addressed only indirectly the issue of sustainable tourism. The CIT report never employs the words "sustainable", "environment", and "ecotourism". When questioned by the French association Actors of Sustainable Tourism (*Acteurs du Tourisme Durable* – ATD) on these issues in 2017, Clement Laloux (ATD, 2017), Head of the Tourism Promotion Mission of the Ministry of Europe and Foreign Affairs, set out the objectives on which the government was working in the perspective of a more sustainable tourism: a better distribution of tourist flows throughout the national territory; the development of new tourism offers to increase the length of stay of tourists; the improvement of the quality of reception.

The CITs that followed the one in 2017 focused on multiple issues: promoting France internationally and increasing resources for public and private investment (CIT, 2018a), hosting major sporting events and digital technology (CIT, 2018b), training and employment (CIT, 2019). It is only from the 5th CIT (2020a), that the issue of sustainable tourism begins to take the place it deserves within this committee and consequently in the national tourism strategy. The priority of the CIT of May 2020 is obviously the exit from the sanitary crisis, with the implementation of the necessary sanitary measures and measures to recover the sector, as well as the adoption of the Tourism Plan 2020, as announced in 2014. What emerged from the CIT report is the spreading of the idea of sustainable tourism as an objective to be followed to build the tourism of tomorrow. This objective is pursued though different measures.

Firstly, through financial support that requires the beneficiary actors to show an engagement in the transition towards sustainable tourism:

- Measure 15 announces that more than €1.3 billion will be invested by the Bank of Territories (*Banque des Territoires*) and Bpifrance in the tourism sector, for an expected investment effect of €6.7 billion and specifies that "support for the transition to a more sustainable and digitalized tourism will be a common factor in the investment themes of all these tools." (CIT, 2020a)
- Measure 17 establishes that from 2020, the Social Tourism Investment Fund will be tripled with an increase in its investment capacity to €225 million and the eligibility criteria will become more flexible. If this fund is designed to support tourism actors in a post-crisis phase, it is requested that "In return, (...) actors demonstrate their willingness to transform, particularly in terms of sustainable development and digitalization." (CIT, 2020a)

Secondly, through measures encouraging innovation and digital technology:

- Measure 18 announces that a platform for the valorization of data relating to the French tourism offer will be set up by the Bank of Territories by 2021 and a call for projects will be launched to incite tourism companies to propose solutions for the tourism of tomorrow to be "more respectful of the principles of sustainable development." (CIT, 2020a)

Thirdly, through measures to recover the sector, based on sustainable values:

- Measure 19 specifies that the French recovery plan "should orient the sector towards the objectives of the European Union in terms of environmental and digital transition, and in particular encourage the respect for the environment, the reduction of the carbon footprint and the use of digital technology in order to make Europe one of the leaders in the transition of the sector." (CIT, 2020a)
- Measure 20 announces the definition of sectoral roadmaps ensuring a longer-term response to the new challenges of competitiveness, employment, training, digitalization and sustainable transition of the sector.

The recovery plan provided for by the CIT of 14 May 2020 mobilizes resources up to €18 billion to sustain the recovering and transition of the sector.

At the end of the 2020 summer season, the CIT meeting on 12 October 2020 analyzed the effects of the crisis and the measures employed and noted the emergence of "new tourist practices and new ways of consumption: increase in proximity tourism (local and departmental), preference given to last-minute bookings, search for large natural areas" (CIT, 2020b). In particular, outdoor activities have been favored: walking, cycling (the Loire à Vélo and the various cycle routes have seen important progress) and water sports.

With regard to measure 18, adopted in May 2020 and encouraging innovation, the CIT (2020b) once again emphasizes that "innovation and sustainable development must be at the heart of the tourism recovery, in order to provide lasting solutions in response to the health and economic crisis." Atout France, France's tourism development agency, in partnership with the Welcome City Lab, a programme to stimulate innovation in the tourist sector created in 2013 with the support of the City of Paris, launched the call "Innovative tourism solutions post

COVID 19 epidemic". Out of 186 applications received, 10 projects were selected because of their innovative approaches. Three projects, directly deal with the issue of sustainability:

- **VAOVERT**: France's first eco-responsible accommodation platform, for travelers wishing to escape into the nature.
- **PEEK'IN**: An application allowing professionals to return items forgotten by their customers in a few clicks and thus avoiding thousands of unnecessary replacement purchases.
- **SOLIKEND**: A new hotel booking platform based on a solidarity concept: the payment of the nights is entirely donated to the association chosen by the client at the time of booking. This pushes the management of vacant room for social purposes.

A national strategy favorable to tourism is also being pursued by the **Tourism Sector Committee** (Comité de filière tourisme - CFT), launched by the CIT on 17 May 2019. In particular, the CIT of October 2020 announces that the CFT will work on a sector general agreement for the revival and transformation of tourism, in order to ensure a longer-term response to the new challenges of competitiveness, employment, training, digitalisation and the sustainable transition of the sector.

The perspective of sustainable tourism finally seems, following the sanitary crisis linked to COVID19, to find its place within the national strategy for tourism and the measures adopted at national level. As Vincent Rolland stated in his report on the draft finance law for 2021 presented to the National Assembly: "The extent of this crisis in tourism makes it particularly necessary today to reorient the sector in a profound way, to ensure its survival. It is a question of seizing the opportunity that it can constitute to build the tourism of tomorrow, adapted to the expectations of consumers and to the economic and environmental constraints of the future." Moreover, "it seems particularly necessary to develop a sustainable tourism offer, understood in the broadest sense, which would meet a growing demand from holidaymakers, but would also constitute the only way forward for a sector that is central to the French economy." (Rolland, 2020)

If awareness of the importance of sustainable tourism is late in France in terms of national strategies, occupying a marginal place at least until 2020, it is essential to notice that the values of sustainable development are since several years at the heart of other national strategies and laws which contribute, indirectly, to the development of this sector in respect of environmental, social and cultural values.

Examples include the **Mountain Law** and the **Coastal Law**. The Montain Law (*Loi relative au développement et à la protection de la montagne – Loi Montagne*) was voted in 1985 and then updated by the 2016 law. It concerns more than 5,000 municipalities and aims to find a balance between the development and protection of the mountains and the control of their urbanization, which naturally conditions the development of tourism in these areas. In the same way, the Coastal Law (*Loi relative à l'aménagement, la protection et la mise en valeur du littoral – Loi Littoral*), adopted on 3 January 1986, applies to all municipalities bordering the sea and inland water bodies of more than 1,000 hectares and constitutes a legal tool aimed at

ensuring a balance between development and protection of the natural and cultural costal heritage.

Similarly, the **National Biodiversity Strategy 2011-2020** (Stratégie nationale pour la biodiversité 2011-2020) adopted by the government in 2011 aimed to balance the relationship with nature, by proposing new development paths. The Directorate General for Enterprises (*Direction Générale des Entreprises*) has helped to translate the principles of this strategy into the tourism sector in order to make all stakeholders aware of the challenges of preserving biodiversity and to disseminate good tourism practices. Two tools have been proposed to tourism stakeholders: **The guide "Biodiversity & Tourism, new opportunities for businesses and destinations?"** (*Biodiversité & Tourisme, de nouvelles opportunités pour les entreprises et les destinations?*), and the **passport "Biodiversity in the Overseas Territories for responsible tourism"** (*La biodiversité en outre-mer pour un tourisme responsable*).

Finally, another national framework that encourages the pursuit of sustainable tourism is the one defined by the **Regional Natural Parks** (*Parcs Naturels Régionaux* - PNR) that are territories recognized at national level for their natural wealth, the value of their heritage and their landscapes, but fragile because they are threatened either by rural devitalization or by excessive urban pressure and uncontrolled exploitation of their resources. The territory of a PNR is classified by decree of the Prime Minister, on the basis of a report by the Minister for the Environment, for a renewable period of fifteen years. This recognition is only granted to a territory if it intends to protect and enhance its natural, cultural and human heritage, by implementing an innovative policy of planning and economic, social and cultural development, respectful of the environment. The shared project for the territory is formalized by a contract: the **Park Charter**. Tourism is one of the main activities concerning the PNR in France.

4.9.2 Key Stakeholders

4.9.2.1 Governmental and semi-governmental bodies

As mentioned above, at the national level, the two Ministries in charge of tourism are: the **Ministry of the Economy, Finance and Recovery**, Directorate General for Enterprises, Sub-Directorate for Tourism and the **Ministry of Europe and Foreign Affairs**, Mission for the Promotion of Tourism. These bodies function in close collaboration with the Inter-ministerial Committee on Tourism and the Tourism Sector Committee.

The **Inter-ministerial Committee on Tourism** (*Comité interministériel du tourisme* - CIT) brings together all the relevant ministers and tourism stakeholders in France (local elected representatives, trade unions representing a number of tourism structures, businesses, operators and members of the Government). The CIT meets regularly since 2017 and contributes to defining the sector's development strategies, as well as the measures needed to implement these strategies. Since May 2020, the CIT has paid particular attention to the issue of tourism of the future and, in this perspective, to sustainable tourism.

The **Tourism Sector Committee** (*Comité de filière tourisme* - CFT) is chaired by the Secretary of State for Tourism, French Nationals Abroad and the Francophonie and brings together professional federations and associations representing the sector of tourism. This body was

created in 2019 to enable in-depth consultation and the co-construction of tourism policies between professionals and public authorities. Since 2019, the CFT has been working on four main areas: employment and training, sustainable tourism, regulatory issues and competitiveness, digital and digital transformation. Concerning the topic of sustainable tourism, the CIF has been in charge of establishing a contract for the revival and transformation of tourism. To do so, an on-line consultation is organized from 10 May to 20 June 2021 to ask French and international citizens about solutions for sustainable tourism.

Atout France is France's tourism development agency and is responsible for strengthening the positioning of the country as an international destination. Atout France counts 1,300 partners and develops its international missions through a network of 32 offices in 29 countries. The agency assists its partners and their territories in the development of tourism strategies. It also incites investment projects and marketing and promotional actions in order to stimulate the French tourism offer and improve its quality. In this sense, the Agency is in charge of missions (classifications, registrations, labels, etc.) aimed at guaranteeing the quality of services offered to visitors. Among Atout France's actions in relation to sustainable tourism, one can cite the following ones:

- The **Destination Contract Scheme** (*Contrat de destination*), which is a tool proposed to regions and regional tourism committees as well as to their sub-regional partners. These contracts benefit from specific financial resources from the State, through Atout France, and aim to encourage a better distribution of international tourist flows in time and space. This can ensure a better management of the impacts of tourism and, consequently, a more sustainable tourism.
- The creation of **sustainable tourism clusters for territories and sectors** (*Pôle tourisme durable des territoires et filières)*, designed to help Atout France's partners to adapt to the structural changes in French and European societies, taking into account the environmental and sustainable dimension and the role of digital technology.
- The **European SMARTMED programme**, in which Atout France is involved, that aims to stimulate a new long-term vision for tourism in the Mediterranean with the creation of a platform to strengthen the global attractiveness of territories while respecting societal and environmental issues and facilitating the transfer of know-how between countries. The project started in November 2019 and will run until 30 June 2022.

4.9.2.2 Tourism Associations

A number of tourism associations are active in France promoting the values of sustainable tourism at the local, regional and national level:

The **National Federation of Institutional Tourism Organisations** (*Fédération nationale des organismes institutionnels de tourisme* - ADN Tourisme) was born on 11 March 2020 from the grouping of three historical federations of tourism actors: *Offices de Tourisme de France, Tourisme & Territoires et Destination Régions*. ADN Tourisme represents, at the national level, the combined strengths of nearly 1,100 structures and 11,500 employees. Among the values shared by ADT Tourisme is the defense of tourism which is respecting sustainable development. The federation develops strong partnerships with the State and its bodies, as

well as with private actors, in order to develop innovative tourism actions respectful of the territories. Sustainable tourism is not conceived as a tourism sector, but rather as a way of approaching tourism in a transversal manner, respecting natural resources and involving local populations.

Sustainable Tourism Actors (*Acteurs du Tourisme Durable* - ATD) is the first national professional network aiming to move the sector towards more responsible practices, by creating synergies and promoting good practices. The association was created by Mathieu Duchesne in 2011 and in 2021 brings together more than 150 tourism stakeholders. Among ATD's projects can be cited the Sustainable Tourism Universities, a project launched in 2015, the Sustainable Tourism Awards, since 2017, and the publication of the White Paper "Tourism and Climate Change" in 2020.

Acting for Responsible Tourism (*Agir pour un Tourisme Responsable* – ATR) recognizes since 2004 tour operators committed to sustainable development and offering trips that respect the planet and its inhabitants. The ATR label is a guarantee of these values and helps tour operators to act collectively for responsible tourism by promoting responsible travel, setting up and evaluating sustainable development strategies, exchanging best practices and building common responses to issues such as the fight against climate change, waste management, etc.

The **Association for Fair and Solidarity Tourism** (*Association pour un tourisme équitable et solidaire* - ATES) refers to all tourism experiences that maximizes the economic benefits for local people and actors and minimizes the impact of tourism on the inhabitants and the environment. ATES gathers fair and solidarity tourism actors, tour operators, organizations and its aim is to support and promote fair and solidarity tourism concepts and products from their conception to their marketing. This means a strong involvement of local populations in the different phases of the tourism project, with the objective of a sustainable and balanced development of the territories, directly through the tourist activity, and indirectly through the financing of a development fund dedicated to projects of general interest. ATES raises awareness among institutions and the general public, and runs a reference system for the evaluation of fair and solidarity tourism practices. As such, it holds the Fair and Solidarity Tourism Guarantee label (*Label Garantie tourisme équitable et solidaire*). Finally, it carries out capacity building programmes for fair and solidarity tourism actors, both in France and abroad.

4.9.2.3 NGOs, Sustainable Tourism Networks and Partnerships

The **Regional Natural Parks** (*Parcs Naturels Régionaux* - PNR) is a system created by a decree of March 1, 1967 and represent excellent tourist destinations in France that are open to all and have a common strategy for supporting sustainable tourism. They constitute a network of 56 parks throughout France and are coordinated by the Federation of Regional Nature Parks, which also ensures the promotion of their actions and their representation at national and international levels. All of the Parks' charters devote a chapter to tourism and 27 of the 51 parks in France have signed up to the **European Charter for Sustainable Tourism**. Some parks are directly involved in the emergence of the national pole of excellence in Ecotourism/Slow tourism, this cluster represents for them an opportunity to develop tourism practices in the field of itinerancy and, more broadly, in the field of ecotourism.

The **Network of Great Sites of France** (*Réseau des Grands Sites de France*) is an association which was created in November 2000 and which groups together the organizations in charge of managing the sites that received the label "Grand Site de France". This label is awarded to a site of great renown and with high visitor numbers. The awarding of the label is subject to the implementation of a project for the preservation, management and development of the site, in accordance with the principles of sustainable development. The perimeter of the territory concerned by the label may include municipalities other than those including the classified site, as long as they participate in the project. In 2021, the Network counted 47 Grands Sites members, which welcomed nearly 32 million visitors. The Network is a lively place for sharing concrete experiences and exchanging know-how between sites. Sustainable tourism is at the heart of the activity of the Grands sites. A framework document was published in 2014 highlighting the importance of the landscape and the experience of place: **"Great Sites of France and tourism"** (*Grands Sites de France et tourisme*). A practical guide with concrete experiences was published in 2016: **"Sustainable tourism in practice: 20 innovative examples in the Grands Sites de France"** (*Le tourisme durable en pratique: 20 exemples innovants dans les Grands Sites de France*). The challenge is to imagine a form of tourism that preserves the qualities, values and spirit of the sites, while enriching the visitor experience, and generating economic wealth and jobs for the territory and its inhabitants.

The **French Agency for Ecological Transition** (*Agence de la transition écologique* - ADEME) is a public institution of an industrial and commercial nature (*Etablissement public à caractère industriel et commercial* - EPIC) under the supervision of the Ministries of Ecological Transition and Solidarity (*Ministères de la Transition écologique et solidaire*) and of Higher Education, Research and Innovation (*Enseignement supérieur, de la Recherche et de l'Innovation*). ADEME is involved in actions related to sustainable development and, although it does not exclusively address tourism stakeholders, it does work with them in the exercise of its main functions. The report presented to the National Assembly by Vincent Rolland in 2021 states that for ADEME: "Sustainable tourism should not be seen as a separate practice or a particular tourist market, but as an integrated approach to ensuring the development of tourism that is resolutely sustainable".

Waterways of France (*Voies navigables de France* – VNF) modernizes, operates and develops 6,700 km of the 8,500 km of French waterways. It is the largest network in Europe with 4,000 engineering structures and 40,000 hectares of land. VNF is a public administrative establishment which, thanks to the commitment of specialized professions (lockkeepers, dam operators, maintainers, study and development managers, lawyers, etc.), enables the use of rivers and canals for the safe and low-pollution transport of goods, but also for tourism, water sports and hydroelectric production. VNF is mainly collaborating with river tourism operators in two areas: reducing greenhouse gas emissions from boats and equipping waterway infrastructures for the ecological management of river navigation.

Sport and Cycle Union (*Union sport et cycle* - USC) is the leading professional organization in the sport sector. It gathers more than 1,400 companies, 500 brands and 3,000 shops. The Union has a Sustainable Development Commission which has the objective to promote concrete initiatives by sport and cycle companies in favor of environmental protection and

social ethics. On these issues, the commission encourages meetings and exchanges between members, provides the exchange of knowledge and experiences and carries out legislative and regulatory monitoring as well as studies, follows up on projects implemented by NGOs and initiates collective actions.

4.9.2.4 Relevant research and educational bodies

Several universities in France offer courses related to sustainable tourism. These courses range from Bachelor to Master level. Universities also have research centers dedicated to tourism issues, some of which may have a research focus on sustainable tourism. The main public universities with training research centers in the field of tourism are united in the Association **Tourism Research Higher Education** (*Association Tourisme Recherche Enseignement Supérieur* – AsTRES). AsTRES is an association created in September 2010 by the Presidents of the founding universities. One of its missions is to develop a research environment and encourage partnerships between the members of the network, and to develop synergies on the theme of tourism in the world of higher education and research, at the European level and more broadly at the international level. AsTRES regularly organizes conferences between researchers. The one in 2019, in collaboration with the Brazilian network "Tourism, Heritage and Public Policies" (*Rede TP3*) took place in Bélem, Brazil, and focused on the issue of public policies and the economic, social and environmental issues related to tourism.

At the Bachelor's level (*Licence*), it is rarer to find specializations in sustainable tourism, but there are some professional courses centered on these questions, such as the Professional Degree (*Licence Pro*) in Sustainable Development of Territories through e-commerce and e-tourism at the University of Toulouse Jean-Jaurès or the Professional Degree in Tourism Professions: Communication and promotion of territories: sustainable tourism at the IUT of Aix-Marseille.

Concerning the Master level, the main courses identified[14] are:

- University Le Mans: Master Territorial Management and Local Development, specialization Management of natural, cultural and intangible heritage and sustainable tourism.
- University Lumières Lyon 2: Master Tourism, specialization Responsible development and marketing of territories,
- University Paul Valéry Montpellier: Master Tourism, specialization Tourism and sustainable development of territories,
- University of Toulon: Master Tourism, specialization Management of sustainable tourism,
- University of Versailles Saint-Quentin-en-Yvelines: Master Economics and governance of the environment and the territory, specialization Tourism and Environment.

[14] The search was carried out in June 2021 via the https://www.trouvermonmaster.gouv.fr platform using the key words "sustainable tourism" for Masters with a course title where the theme of sustainable tourism is explicitly displayed and by looking at the syllabuses (when available) of the Masters in Tourism to identify the courses dealing explicitly with sustainable tourism.

Several universities offer degrees in Tourism where the issue of sustainability is addressed within the programs of the Master's courses, either transversally to the different disciplines taught or in courses specifically oriented towards sustainable tourism. As an example, the University of Angers proposes a course named Sustainable development in the framework of the Tourism Master and the University of Paris 1 Panthéon-Sorbonne, IREST (*Institut de Recherche et d'Etudes Supérieures du Tourisme*), proposes several courses dealing with the issue of sustainability: Governance of territories in the framework of sustainable development, Tourism and sustainable development, Inclusive tourism and participation of local populations, Sustainable management of tourism projects, Tourism and environment.

Among the main training initiatives created by private actors we can mention the **Universities for Sustainable Tourism** organized by Sustainable Tourism Actors. Unique in France, this training gathers together the main tourism actors around the issue of sustainable development.

MOOCs on sustainable tourism are also available online, created for example by French researchers and universities in French, English, Arabic, etc.:

- Florie Thielin, consultant, journalist and trainer: Sustainable Tourism: https://4rtourisme.fr/tourisme-durable-supports-cours-formation-power-point/
- UNESCO UNITWIN Network "Culture, Tourism, Development" (led by IREST, University Paris 1 Panthéon-Sorbonne): Tourism Management at UNESCO World Heritage Sites (Vol. 3), with a chapter dedicated to Local Communities' Involvement and Sustainable Tourism.

4.9.2.5 Individual tourism business and destinations of particular relevance

Cantal Seminars (*Cantal Séminaires)* is a business tourism mission launched by Cantal Tourism, the Departmental Tourism Committee, in September 2007, in order to develop the organization of company business meeting. Cantal Séminaires is a receptive structure located in the heart of the Auvergne and its objective is to be recognized as the "green destination" par excellence for the organization of eco-responsible business trips. Organizing their meetings in the department, companies participate in a concrete sustainable development project protecting the landscapes of the Cantal by managing visitor flows and enabling visitors to discover it in a sustainable way. Cantal Séminaires adopted several approaches. For transports, a programme of voluntary compensation of greenhouse gas emissions has been set up. For accommodation, the organization avoids large accommodation structures in favor of accommodations on a human scale located in exceptional settings and ensuring a personalized welcome, while helping to maintain the local economy. The activities offered promote heritage, local products and the environment. The catering is based on regional and seasonal products. The supplies distributed during the meetings are recyclable.

The company has also set up a 50-point commitment chart with all its partners, stressing their common engagement for sustainable development.

Serge Kampf Les Fontaines Campus is a place exclusively dedicated to corporate events in the respect of sustainability principles. The Campus, located in Chantilly, includes a Rothschild

castle for catering, a contemporary complex for workspaces and 7 villas for accommodation, in the heart of a magnificent 52-hectare wooded park. Since its opening in 2003, it has always been run on the basis of social and environmental responsibility. The Campus consumes 100% green energy and the heating and cooling of the rooms is done by geothermal energy. The catering is based on seasonal and local products. The Campus has also eliminated all individual packaging and plastic bottles in the meeting and catering areas. Thanks to these actions, the site's greenhouse gas emissions have been reduced by 31% in the space of ten years. In February 2020, the Serge Kampf Les Fontaines Campus obtained ISO 20121 certification.

Green seminars (*Séminaires au Vert)* is an offer from Logis (formerly *Logis de France*) which gathers 87 member hotels and restaurants throughout Europe. All members are required to comply with a set of criteria imposed by the brand: a privileged setting, pleasant rooms and high-performance technical equipment, quality catering using local and home-made products, and an authentic and personalized welcome in a setting close to nature. Séminaires au Vert offers services and facilities adapted to business clients, respecting the environment and located in the countryside, in the mountains or by the sea.

4.9.3 Activities and instruments for the development of sustainable tourism

4.9.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Numerous initiatives are organized at local and regional level to pursuit the objectives of sustainable development. ATD regularly records these initiatives on its website in order to update a database of good practices to be shared between tourism stakeholders. Below some examples of initiatives are reported that can take place at different stages of the tourism value chain.

Mobility and transport

Coq-trotteur is a digital platform dedicated to destinations and aiming at making their tourism offer more clear and accessible. This service is useful to gather disperse information about local services, to boost the economy and enhance the value of the local offer, protecting the local ecosystem. The visitors using the platform can easily discover the area and the activities adapted to their desires and constraints thanks to highly personalized filters and the possibility of creating personalized itineraries. The creation of tailor-made tourist itineraries allows the optimization of journeys (better combination of activities to reduce the carbon impact of travelers). The itinerary takes into account the opening hours of the sites, the weather conditions and the peak periods and hours. Once the route is proposed, the application indicates to the traveler an alternative mode of transport between each activity: by bike, on foot, soft transport, bus, etc. This tool also makes it possible to better distribute the flows on the territories in order to better protect the sites, the biodiversity, the heritage and to better take into account the needs of the host communities.

Since 2001, the ***Baie de Somme***, labeled *Grand Site de France*, has implemented an eco-mobility project within the site. The *Syndicat Mixte*, a public establishment for local cooperation which brings together 18 communes, has piloted the project, which had two objectives: to pursue the policy of preserving the natural area and to respond to tourism

demand. Thus, alternative solutions to the individual car have been found. Thanks to European funds, the department has been able to structure a cycling network and organize a range of activities dedicated to the discovery of natural areas by soft modes of transport. Ten discovery loops (approximately 170 km) and more than 50 bicycle relays (accommodation providers, repairers, rental companies, stations, etc.) make it possible to discover the bay and its heritage. The railway is the other main way that allows visitors to discover the bay in a steam train that runs for 27 km between the two towns Cayeux-sur-Mer and Le Crotoy. Cyclists can also take their bikes on board to combine modes of travel. The Côte Picarde by bike (*Côte Picarde à vélo*) network, created and co-organised by the Tourism Development and Reservation Agency of the Somme (*ADRT Somme Tourisme*) and the Grand Site Baie de Somme, brings together the various players in the cycling industry. Its objectives are to offer a service that is adapted to the needs of tourists travelling by bike and to professionals (tourist offices, rental companies, accommodation providers) through a charter setting out the requirements for a quality welcome for cyclists.

Raising awareness among tourism actors

The **Seignanx Tourist Office** created in 2002, has set up various actions to raise awareness among its staff and convince them to adopt environmentally friendly behaviors. For example, it has adopted a guide to eco-actions that is provided to all employees. The guide specifies the steps to be followed for the purchase of products used in the office, waste management, energy savings and water use.

In 2017, a new action plan was adopted by the Tourist Office with the objective of controlling internal consumption (waste, electricity, etc.), changing the electricity supplier and continuing to invest in the sustainable tourism projects. The Seignanx Tourist Office has thus chosen a 100% renewable and cooperative electricity supplier, Enercoop, that is a cooperative recognized as being of public interest and of limited profitability (non-speculative). Enercoop buys electricity under direct contract from 130 French renewable energy producers (hydroelectric, wind, solar and biogas). The aim is also to move towards short circuits by bringing the place of production of energy closer to the place of its consumption.

The **Eco-tourism Chart in the Vézère Valley** is a tool that brings together and identifies tourist service providers who are committed to sustainable tourism. The Vézère Valley welcomes nearly one million visitors every year and this has an impact on the area, its resources and its population. In order to preserve the fragile environment of the area, which covers 63 municipalities, the local public and private actors have decided to gather together to design the tourism of tomorrow. They have decided to orient the Vézère Valley and its basin towards a sustainable destination of excellence. The "eco-tourism" chart is meant to support all actors in the tourism sector: accommodation providers, restaurant owners, sites, local producers, craftsmen, artists, leisure activity providers, etc. It aims to formalize the commitment of tourism actors for sustainable development by developing a feeling of belonging to an eco-responsible network and by communicate common values to customers.

Booking

Fairbooking is an ethical and solidarity-based platform that puts accommodation and travelers in direct contact. The aim is to preserve the jobs and investments of the establishments that

pay between 15% and 30% of their commission to intermediaries, by booking their hotel, bed and breakfast or campsite directly and without intermediaries' costs.

Circular economy

Betterfly Tourism helps tourism professionals with ideas and initiatives to reduce their environmental impact and operating costs. During the audits carried out in hotels, the high environmental impact of the "breakfast" activity was noted, both because of the frequent use of products in individual formats (particularly butter, jam, sugar and biscuits) and because of the large quantity of food waste generated. Thus, a series of good practices have been developed and shared with the accommodation actors to reduce breakfast waste for a more responsible consumption. These measures include the involvement of local producers that can promote zero waste products and offer bulk or large format packaging. Their products can also be offered for sale in order to promote suppliers and provide another economic lever. Another idea is to invest in production, for example of honey, as is the case at the two hotels Les Trésoms in Annecy and Le Florence in Nice.

In 2004, the ***Aven d'Orgnac*** obtained the *Grand Site de France* label. However, the shop on the site quickly closed its doors. For this reason, in 2005, the association Around the Aven (*Autour de l'Aven*) was created on the initiative of Geneviève Ragu, a beekeeper, bringing together seven producers who wanted to offer visitors local products, without intermediaries. The collective continued to grow and the shop is now a permanent structure open from May to October. Several producers have retired through the years and been replaced without difficulty. Visitors to l'Aven appreciate the fact that local producers, rooted in their land, are present on the site. They can thus discover another aspect of the local heritage.

Financing

As part of the national recovery plan, the **French Agency for Ecological Transition** (*Agence de la transition écologique - ADEME*) has launched the **Sustainable Tourism Fund** to help accommodation and restaurant owners finance their ecological transition projects. The Sustainable Tourism Fund has a budget of 50 million euros over 2 years and has 3 components: the "1000 restaurants" operation, tourist accommodations and the development of a slow tourism offer.

Accommodation

In order to meet the expectations of eco-citizen visitors, the **Paris Convention and Visitors Bureau** (*Office du tourisme et des congrès Paris* – OTCP) launched an innovative **sustainable development programme** in 2012, which aims to encourage Parisian and Ile-de-France hotels to adopt an eco-responsible approach and to improve their competence on all the themes of sustainable development (environmental, economic and social/societal aspects). Co-funded by the Paris Convention and Visitors Bureau and ADEME Île-de-France, the programme had 463 hotel signatories to its chart for **sustainable accommodation in Paris** by the end of September 2016. Until the end of June 2015, this programme was reserved for hoteliers, who were members of the Office. Subsequently, with the holding of the COP21 in Paris in December 2015, it was opened up to all the hotels that had been allocated a quota for this event, regardless of their membership of the Office.

Activities

Several actors in the tourist industry are now committed to help visitors discover their territory in a different way, with respect for the inhabitants, the environment and the heritage, while also supporting local economy. In this perspective, the Morbihan Regional Natural Park proposes walks on a variety of themes that are also recognized by the **Regional Nature Park Values label** (*Valeurs Parc naturel régional*).

Another example comes from **ExploreParis Online Shop** that is the result of a collaborative work of tourism stakeholders in Paris as part of the Destination Contract signed with the State in June 2016: the Paris Convention and Visitors Bureau, the Hauts-de-Seine Department, the Seine-Saint-Denis Departmental Tourism Committee, the Val-de-Marne Departmental Tourism Committee, the RATP, the Welcome City Lab, IREST and Atout France. These eight entities have pooled their skills and resources to renew and revitalize the image of Paris as a destination and to develop and promote a new urban tourism offer on the wider scale of Greater Paris. Their online shop exploreparis.com presents tourism and leisure activities offered in French and English throughout Greater Paris. A vast programme of visits to be booked and paid for online is available throughout the year on themes that break away from the classics of Parisian tourism and helps to meet local people and support local activities: know-how, gastronomy, waterside activities, neighbourhood visits, street art walks, etc.

Accessibility

The Museum of Prehistory, part of the ***Grand Site de France* of *Solutré Pouilly Vergisson***, has been working for several years to diversify its public. It has chosen to give priority to actions with specialized structures in order to identify the expectations and needs of disabled people and to train the museum staff. Many people did not have access to the museum: people with disabilities, but also those in detention centers or retirement homes, people who are disadvantaged for financial or mobility reasons. The managers of the museum have worked to make the museum accessible to all these publics. Several mediation tools have been designed in collaboration with a specialized structure for each type of disability in order to be perfectly adapted, both in terms of form and content. These tools allow a fully independent visit and can also be used with other types of visitors. For example, four educational kits and a tactile book were designed in collaboration with the Regional School for the Visually Impaired (EREA-DV) in Villeurbanne. The museum also offers off-site activities for the disabled.

4.9.3.2 Marketing and information services supporting sustainability in tourism

The main stakeholders, presented in the respective chapter above, support the promotion of sustainable tourism in France and the debate on this subject through their websites, publications and other initiatives.

As an example, Sustainable Tourism Actors (*Acteurs du Tourisme Durable - ATD*) devotes a session on its website to the presentation of good practices related to sustainable tourism. This tool allows both the promotion of the projects of actors engaged in this field, but also the exchange of good practices between them. ADN-Tourisme also regularly publishes a newsletter on these themes.

A key role in the publication of information on sustainable tourism is played by ***Voyageons-Autrement.com***, a portal founded by Romain Vallon and Christophe Luce in 2008. The portal has published between the years 2008 and 2021 about 4.500 articles and aims, on the one hand, to raise awareness and help travelers to prepare and carry out their trips in a responsible way and, on the other hand, to increase the visibility of actors and to promote the concepts of sustainable tourism. Since April 2019, the portal publishes a free quarterly magazine: ***La Feuille de Chou!***. It is an 8-page magazine distributed free of charge throughout France with a print run of over 36,000 copies each quarter. La Feuille de Chou highlights sustainable tourism initiatives and actors. In 2018, for the tenth anniversary of the portal, the book **"10 years of sustainable tourism"** was published by voyageons-autrement.com.

Another initiative aimed at both promoting sustainable tourism and listening to the voice of stakeholders and tour operators is that launched by the Tourism Sector Committee (*Comité de filière tourisme - CFT*) in 2021. The CFT, chaired by Jean-Baptiste Lemoyne, Secretary of State for Tourism, and a group of stakeholders from the French tourism sector have initiated a **citizen consultation on responsible tourism** in France. The process, which was online from 10th of May to 20st of June 2021, mobilized nearly 50.000 participants. More than 1.800 proposals emerged and will be used to inform tourism strategies and concrete actions at local and national level. The conclusions will notably feed into the strategic plan for tourism announced by the President of the Republic for 2021. For more than a month, 49.432 people (in France, but also internationally) answered the question "How to act for a more responsible tourism in France?" on the Make.org platform. The consultation gathered 1.830 proposals and more than 334.400 votes, which led to the emergence of 10 key ideas for more responsible and sustainable tourism, including: the development of clean transport and the fight against waste, the promotion of local products and heritage, the rebalancing of tourism on the territory, as well as raising awareness of more responsible tourism from a young age.

One of the latest publications in France on the theme of sustainable tourism is the one **"Social and solidarity tourism"** (*Tourisme social et solidaire*), June 2021. The online report has been published by AVISE (Engineering agency for alternative entrepreneurship) that has the mission of developing social and solidarity economy and social innovation in France, in collaboration with the National Union of Tourism Associations (*Union nationale des associations de tourisme* - UNAT), an association created in 1920, head of the social and solidarity tourism network. This publication focuses on the need to reconcile accessibility to tourism with the imperatives of sustainable tourism.

4.9.3.3 Tourism Sustainability Certification Systems and Awards

There are currently more than thirty labels in France of different types and with different requirements in the field of sustainable tourism. According to the report drafted by Vincent Rolland (2020) and presented to the National Assembly: ADEME considers that "these labels are very heterogeneous in terms of reputation, requirements of the reference systems, complexity of the approach and even cost of certification". Thus, some are public (European Ecolabel / *Écolabel européen*), others private (*Écogite,* the Gîtes de France label); some are national, others European (Écolabel) or international (Green Key / *Clef Verte*); some are very

demanding, others are simple charters of good practices; some are specific to a sector (*Accueil paysan*), others have a broader scope. Their scope and costs also vary.

In all cases, labels have the advantage of enhancing the value of the sustainable development initiatives undertaken by the tourism actors, and also guide, inspire and orient the choices of the sector's actors and visitors. However, their multiplication decreases the visibility of the sustainable tourism offer, also because they are little used by the reservation platforms, with the exception of certain specialized and less used platforms, such as Vaovert, or Fairtrip.

An example of a specifically French label is the one "***Tourisme équitable et solidaire en France*"** launched in January 2020 by the Association for Fair and Solidarity Tourism (*Association pour un tourisme équitable et solidaire* - ATES). The label is the result of more than two years of work, in close collaboration with French tourism stakeholders and with the support of Fair Trade France. It is an innovative label because it is adapted to all professions (accommodation, restaurants, events, cultural and leisure sites, local tourism organisations, activity providers, etc.). The guidelines are based on 49 to 52 criteria which are analyzed to verify the structure's commitments in three fields: management of the structure, management of the tourist activity, partnerships and solidarity. This label also covers all the components of sustainable development in a comprehensive manner: Preservation of the environment and biodiversity, application of the principles of the social and solidarity economy, and enforcement of local economy.

Another original label is the one developed by the Federation of Regional Natural Parks, called **Regional Nature Park Values** (*Valeurs Parc Naturel Régional*). This is a collective mark awarded by the Parks, on the basis of a contractual approach, to all the professionals in their territory who wish to do so and who meet the requirements. It concerns agricultural products as well as craft products, accommodation and tourist services, and educational activities.

Two publications provide ample information on sustainable tourism labels in France:

- "**30 labels for sustainable & responsible tourism**" (*30 labels pour un tourisme durable & responsable*), an online article published by the portal voyageons-autrement.com.
- "**Guide to Tourism Labels: More attractiveness and performance for our destinations**" (Guide des Labels du tourisme : Plus d'attractivité et plus de performance pour nos destinations), an online book published by the Regional Committee for Tourism and Leisure in Occitania (*Comité Régional du Tourisme et des Loisirs d'Occitanie*) in October 2020.

4.9.4 Summary and conclusion on national situation

4.9.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

From a national point of view, the main achievement we can mention is the inclusion of sustainable tourism objectives within the strategy announced by the 5th Inter-ministerial Committee on Tourism in May 2020. This announcement has been followed by the adoption of the Sustainable Tourism Fund, set up within the framework of France Relance in 2021, and

aiming to support, via financial aid, tourism operators (SMEs and associations) in their transition towards sustainable tourism.

At the level of tourism association and networks, the dynamic of these bodies and their projects (presented in the previous sections) show a real shift toward sustainable tourism by an important number of tourism actors, independently from national strategies.

4.9.4.2 Challenges for the development of sustainable tourism and for SMEs

At the local and regional level, initiatives in favor of sustainable tourism are multiplying in France. An important role is played by Sustainable Tourism Actors (*Acteurs du Tourisme Durable* - ATD) and the portal *Voyageons-Autrement.com* in order to centralize the initiatives, to make them known at the national level and also to create synergies between the actors. However, France still seems to lack a tourism plan that puts sustainable tourism at the center, that proposes a common strategy to the actors and that adopts measures capable of orienting all the actors in the sector towards sustainable tourism. Challenges for the SMEs may include:

Support and fundings

Tourism professionals who wish to move towards sustainable development sometimes have to face major investments. The need for financing is obviously accentuated by the crisis in COVID-19 and recovery measures have been put in place. However, it is necessary to think of long-term measures that can accompany sustainable tourism actors at all levels. In this perspective, a national portal, like the "plan-tourisme.fr", could have a section devoted to funds for the transition to sustainable tourism.

Transversal actions

The issue of sustainable tourism touches on a number of fields and it is therefore important to strengthen collective meetings (CIT, CFT, etc.) in order to find common and viable solutions. This can allow, more quickly, having a coherent and readable strategic framework for the actors of tourism.

Training

Training is also essential to support current and future actors in the sector and especially SMEs. University courses in France integrate these issues, but the training offer is often not very visible for potential students (a few trainings show “sustainable tourism” in the Master titles).

4.9.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The tourism sector in France was highly affected by the pandemic. Nevertheless, the results of the 2020 summer tourist season, after a stalled activity from mid-March to mid-May, showed a very slow recovery in June and in the following months. Total international tourism receipts, accumulated from January to August 2020, amount to €21.4bn compared to €40.2bn in 2019, a loss of -€18.8bn (-46.8%) according to the Banque de France (Bank of France). In 2020, France benefited from a strong domestic demand: in July, French hotels had an average occupancy rate of 51% and 94% of French visitors that stayed in France, with the majority staying on the coast and in the countryside. French tourist spending in France in August 2020

was 9% higher than in 2019. The €18 billion emergency and support plan presented at the 5th Inter-ministerial Committee on Tourism on 14 May 2020 provided economic support to safeguard activities and businesses in the tourism sector.

On the basis of these recent developments and general considerations we can suppose that the future challenges for the sector will focus on the following issues.

Local tourism

In June 2020, Atout France launched the #CetÉtéJeVisiteLaFrance (*This summer I visit France*) campaign, in collaboration with numerous tourism stakeholders, the aim of which was to inspire travelers by suggesting new destinations and themes for visits off the beaten track. The campaign also helped to federate the actors of French destinations to bring out the specificity of each territory. Although the campaign was dictated by obvious health reasons, the tourist season showed the potential and interest of local tourism. Local tourism can thus become a priority of post-covid19 tourism.

Better management of flows

The new measures for the management of tourist flows are leading to a rethinking of the modes of visit and transport. The diversification of places, products and activities allows a more capillary discovery of the territories and a better distribution of income among local actors. Alternative modes of transport (by bike, train, on foot, etc.) reduce pollution and create new connections, not only between places, but also between tourists and inhabitants. The de-carbonization of transport is a main objective at all levels of the tourism value chain (trip from one place to the other, local mobility, supply chain, etc.).

Digital tools

Digital tools raise awareness of new types of offers and allow the creation of personalized itineraries. This can mean better management of tourist flows, better coordination between actors, alternative experiences. Digital tools can also enrich the tourism experience with additional information and content. Moreover, digital tools provide access to tourism experiences for people traditionally excluded from mobility.

Political support

The pandemic has shown more than ever the importance of public strategy and public funds. A common strategy (at national and local level) can better unite tourism stakeholders and public funds can guide private actors' choices towards more sustainable tourism.

Research

In order to move towards the tourism of tomorrow it is extremely important to strengthen interactions between the economic sector and the research sector, by sharing data, information and ideas. This will allow for a better understanding of the transition, the behaviors and desires of tourists and the new forms that tourism offer can take.

4.9.4.4 Recommendations for boosting Sustainable Tourism for SMEs

With regard to the information gathered within this report, the set of the following recommendations can be identified to facilitate the development of sustainable tourism and support SMEs.

A common vision and financial support

The common value to be pursuit by SMEs should be clearly and be able to federate all the tourism actors. Political will must also be accompanied by sufficient financial support. Sustainable tourism funds and tax incentive should help the transition financially, but also through technical, commercial and legal support. A direct link with tourism actors should be maintained by structures that are disseminated on the territory to keep advising the actors of the sector, help them in the implementation and monitoring of their projects for sustainable tourism, sharing experiences.

Clarifying the ecosystem of labels

The ecosystem of labels in the field of sustainable tourism is extremely complex in terms of the number of labels, their notoriety, the process of awarding them, the required criteria, the bodies awarding them, the monitoring systems and the cost of certification. These labels are an essential tool to help the pursuit of sustainable tourism objectives and to guide consumer choices, but they are not always easily understandable by both consumers and companies. In order to boost sustainable tourism and SMEs, it might be helpful to rethink the system of labels at the national and international level and to clarify their use for consumers.

Data and indicators

Data and indicators published by national authorities are often focused on the sector's economic dimension, measured through quantitative data. Nevertheless, the picture given of the tourism sector is often partial and aspects like sustainability, access to culture, accessibility to tourism for all publics, environmental impacts, carbon foot are neglected or not sufficiently represented. It is thus necessary to define qualitative indicators of tourism performance, which integrate its consequences on urban planning, mobility, social cohesion and the preservation of natural and cultural heritage.

Promote sustainable tourism destinations

The current period has shown the importance and the urgency for a transition towards sustainable tourism. This has to be achieved through apt strategy and funds, thanks to the joint work of all local stakeholders, as well has by a communication clearly promoting France as a sustainable tourist destination. The efforts to become a sustainable destination has thus to be supported by efforts making visitors perceive the country as such.

Raise awareness of tourists

To be sustainable, tourism needs tourists that understand the importance of sustainability values and are able to choose among a variety of offers. This means to incite the training of young generations and to develop tolls to keep training and informing tourists.

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4.10 Germany

Heike Dickhut and Anna Tenger
(As of August 2021)

4.10.1 Political framework for Sustainable Tourism

4.10.1.1 National Sustainable Tourism Policies and Strategies

The main task and goal of tourism policy at the federal level is to create the framework for a positive development of tourism in Germany. Within the federal government, the Federal Ministry for Economic Affairs and Energy (BMWi) is responsible for tourism policy as there is no separate ministry for tourism in Germany. Based on the articles 30 and 70ff. of the German constitution, competencies and responsibilities are distributed among the federal states which are therefore in charge of the execution and fulfilment of federal law and political obligations or regulations. This means that in regard to tourism policy the individual federal states and municipalities are responsible for the precise planning, development and direct promotion of tourism as well.

As the German Federal Government pursues a policy of qualitative growth, added value and wealth shall be evenly distributed among all regions and citizens. Therefore, tourism policy not only focuses on growth targets but also structural and socio-political improvements. Besides its commitment for the topic of accessible tourism for all, e.g by supporting the establishment of a nationwide certification system for barrier-free travelling, the federal government specifically sets a priority for rural area development. For instance, a main focus of the last legislative period was the revitalisation of structurally weak but culture-rich rural areas by connecting local culture with tourism offers and thus boosting attractiveness of these rural regions (BMWi, 2017).

In general, **explicit focal points** of German tourism policy are rural areas, vocational training, accessibility and health tourism. Additionally, inclusive and sustainable tourism development has become a crucial part of nowadays policymaking as impacts by challenges such as demographic and climate change need to be addressed accordingly and demand for respective response and adaptation strategies (BMWi, 2017).

The current national political framework for tourism is the **Action Plan for the Federal Tourism Strategy** (*Nationale Tourismusstrategie des BMWi*) which was published in June 2021 by the BMWi. In April 2019, the Federal Cabinet decided on elaborating cornerstones that describe the political long-term goals in tourism as well as fields of action to build a basis for the development of a national tourism strategy. At the end of the year, a nationwide dialogue process was initiated for tourism-relevant stakeholders such as policy makers, the tourism sector itself, associations and NGOs, to contribute to the development of the strategy and to identify and collect recommendations for action in form of a catalogue to be handed over to the German Federal Government. The COVID-19 pandemic, however, affected the time plan of the dialogue process but also gave the opportunity to include measures regarding strengthening tourism structures and resilience, supporting tourism businesses and restarting

tourism, and to analyse the pandemic's impacts on the tourism sector (BMWi, 2021). In particular, the BMWi commissioned a study called **Bausteine zur Regeneration der deutschen Tourismuswirtschaft** (Elements for the Regeneration of the German Tourism Industry) executed in 2020 by the consulting companies Project M GmbH and Dr. Fried & Partner GmbH. The study was part of the project extension of the federal tourism strategy and summarized recommendations for measures to be immediately implemented by the federal government.

The aim of the federal tourism strategy is to ensure the long-term success and to support the development of Germany as a tourist destination. The economic factor tourism is to be strengthened and the entire sector in all its diversity is to be prepared for the future in the best possible way. Moreover, the strategy is committed to the following overarching political goals: Firstly, domestic added value is to be increased and thus economic growth promoted. Secondly, the quality of life of people living in Germany should be sustainably improved. Thirdly, tourism should contribute to international stability.

Furthermore, with the national tourism strategy, the federal government wants to contribute to better coping with challenges and risks so that the potential of tourism in harmony with the three dimensions of sustainability - economic, ecological and social - can be fully exploited in the future (BMWi, 2019, April 30).

The **Government's Tourism Policy Report** (*Tourismuspolitischer Bericht der Bundesregierung*), which is regularly prepared and provided by the BMWi gives an overview of the current situation in tourism and explains in this context the tourism policy goals of the federal government (BMWi, 2017).

The report provides extensive written and visualized information about the nationwide development of tourism and its opportunities and challenges as a tourist destination. It also examines relevant tourism stakeholders and organisations in tourism policies at the federal level, and gives insight to the tourism policies of the BMWi and respective fields of action, also of other federal ministries. The federal government uses the tourism policy report as a communication tool regarding activities and measures with tourism policy relevance.

Other federal policies and strategies that are of severe relevance for the sustainable development in Germany in general and that also affect the tourism industry and its political frameworks are the following: 1) **Germany's National Sustainable Development Strategy** that aligns with the UN SDGs, 2) **The German Strategy for Adaptation to Climate Change** and 3) **The German National Strategy on Biodiversity** including the field of action "Tourism and recreation close to nature".

As already mentioned in the beginning of this chapter, the implementation and integration of federal policy is assigned to the authorities of the individual federal states. The states are invited by the federal government to align with and adapt to national policies and strategies but have to manage the implementation process and level themselves. Therefore, approaches to implement sustainable tourism policies or practices vary, depending on the individual tourism strategies of the respective federal state. However, due to international and national commitment, such as the Agenda 2030 SDGs or the international Education for Sustainable Development programme, and the growing demand for sustainable tourism offers by tourists,

tourism-relevant stakeholders are increasingly aware of the relevance and necessity for sustainable tourism development. Due to this, tourism policy also aims at strengthening especially corporate responsibility and competitiveness by improving conditions for tourism businesses.

As a result, most federal tourism marketing organisations integrate sustainability-related topics like nature tourism, green mobility or local culture and heritage into their marketing strategies and campaigns.

For instance, a few years ago, the German Tourism Association (*Deutscher Tourismusverband e.V. - DTV*), functioning as the representative of tourism stakeholders all over Germany, established the topics of sustainability and accessible tourism as major marketing themes of Germany as a tourist destination. The German Tourism Association (*Deutscher Tourismusverband - DTV*) published a position paper in 2012 called "Tourism and Sustainable Development" in which it presented guiding principles for the development of sustainable tourism in Germany (DTV, 2012). Furthermore, two established competitions for sustainable tourism destinations in Germany have led to growing attention and interest at regional level in recent years. Last but not least, a milestone was set when a guide of the German Tourism Association was elaborated that gives recommendations and helps tourism destinations to holistically integrate all dimensions of sustainability at regional level (DTV, 2016).

4.10.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

Of the sixteen German federal states almost all of them possess a sustainability strategy that aligns with Germany's National Sustainable Development Strategy. In regard to tourism policy the federal states have established tourism strategies that are regularly updated and set and communicate targets in reference to tourism development and activities at regional level. The strategies are elaborated and agreed on by the respective tourism department of the federal state ministries and communicated to the public.

The main objectives of the German tourism strategy generally used to be focusing on increasing tourist arrivals, attracting new target groups, creating competitive advantages by identifying the most recent trends, and increasing the attractiveness of the state as a destination. Therefore, the economic perspective was clearly prioritized. However, in the last recent years, there has been a change of focus due to tourism policy changes and an increasing recognition of today's tourism challenges such as the climate change or the corona pandemic. Although the just mentioned objectives are still of main interest, the topic of sustainability is more and more becoming an issue. The extents, however, vary. Either sustainability is defined as a separate topic the respective tourism ministry is dedicated to, or sustainability is understood as a guiding principle represented in all tourism strategy's actions fields and measures. As of 2021 and in regard to the 16 German federal states, about a quarter does not mention sustainability at all. Another quarter mentions sustainability as a goal or vision without giving further details and about half of the federal states already set targets in alignment with sustainability principles or describe sustainability as the overall guiding theme. For instance, all German federal states that lie next to the North Sea and the Baltic Sea have a clear focus on integrating the topic into their tourism strategies.

Each German federal state has a tourism marketing agency that develops and communicates touristic offers and collaborates with relevant tourism stakeholders such as regional destination marketing organisations or tourism associations and businesses. Depending on the given natural and cultural assets, the federal states focus on different marketing strategies to promote their state as an attractive tourism destination. In the context of sustainable tourism development, sustainability issues are included to different extents. Topics that are commonly aimed at on regional level are e-mobility and eco-friendly transportation, quality and sustainability certification, promoting regional food production and hospitality service, environment protection and education as well as networking and strengthening tourism acceptance. Although sustainability is not commonly communicated as a distinct topic or marketing theme, sustainable tourism offers, and projects can be found throughout all 16 federal states.

In the following, an exemplary insight to the sustainable tourism development of the German federal states will be briefly given.

Baden-Wuerttemberg

Baden-Wuerttemberg is a southern German federal state that lies next to France, Switzerland and Austria. The state mentions sustainability as a fundamental principle in its tourism concept and has several projects and campaigns that focus on sustainable tourism development such as fostering green mobility, as can be seen in the **initiative "bwegt"** as part of Baden-Wuerttemberg's mobility strategy 2025. As one of the first federal states, Baden-Wuerttemberg implemented a **GuestCard** promoting public transportation by guests called KONUS in the Black Forest Region. There are several certified destinations such as the **Swabian Alb Biosphere Reserve** that also was the winning region of the 2016/17 Federal Competition for Sustainable Tourism Destinations in Germany. However, Baden-Wuerttemberg is especially known for its regional food and wine and thus its respective **regional labels and initiatives** that also promote sustainable food and supporting local producers and manufacturers as well as gastronomers.

Bavaria

The largest of the 16 German federal states is Bavaria, located in the south-east of Germany and sharing its borders with the Czech Republic, Austria and via the Lake Constance with Switzerland. Regarding sustainable tourism, Bavaria is greatly investing in developing and implementing state-wide campaigns and measures, such as the funding programme "**Tourism in Bavaria – fit for the future**" (*Tourismus in Bayern – Fit für die Zukunft*). Bavaria is strongly focusing on the topics 'tourism acceptance', 'cultural heritage', 'regional branding' and increasingly on the topics 'environment-' and 'climate protection'. One of the strongest and sustainability-oriented destinations is the alpine **Allgaeu Region**. The destination created its own brand that is known for its emphasis on sustainability and quality and known as a best practice example throughout Germany. Due to its winter tourism offers in the south, the Bavarian tourism marketing agency is also running successful awareness rising campaigns to increase environment protection in winter sports (e.g. *Auch auf dich kommt´s an – Rücksichtsvoll durch den Winter in Bayern*).

Berlin

As the capital of Germany and the largest city state, Berlin is known for its diverse tourism offers and cultural heritage. Furthermore, several tourism festivals and congresses take place in Berlin such as the **ITB Berlin**, the largest tourism trade fair worldwide, or the **Berlin Travel Festival**, both focusing more and more on being a platform to exchange expertise on sustainable tourism development and best-practice examples. Sustainable development and the local integration of the Agenda 2030 SDGs play a major role in the city of Berlin. Therefore, Berlin's **tourism concept 18+** strives to enable a modern and sustainable tourism that is compatible with the city. Due to a decreasing tourism acceptance by the local population in recent years, the city is implementing several measures to include the locals into the city's tourism development strategies and to promote a common understanding between locals and visitors. The project "**Here in Berlin**" (*HIER IN BERLIN – eine Initiative von visitBerlin und Dir*) that is running for several years is a best practice example of how to foster tourism acceptance, develop and implement respective measures and establish mutual appreciation between stakeholders.

Brandenburg

The Federal state of Brandenburg is located in the north-east of Germany and known for its large, protected areas (Biosphere Reserves, Nature and National Parks), water tourism as well as recreational touristic offers. As Brandenburg is surrounding the city state of Berlin, it is also an attractive region for day tourists from Berlin and citizens seeking rural holiday outside the city. The state has a sustainability strategy that aligns with the common 17 SDGs and published a tourism concept to set targets and further define action fields mainly for the topics nature and rural tourism, recreation, water and MICE. As one of the Germany's most sparsely populated regions, the **Uckermark region** of Brandenburg is strongly focusing on nature conservation and low-impact tourism. In 2016/2017 it was a nominee of the "Federal Competition for Sustainable Tourism Destinations in Germany" due to the DMOs engagement in establishing partner initiatives for tourism stakeholders, such as the **"Holiday for the Climate - Network"** ("*Ferien fürs Klima*") that fosters commitment to sustainability principles of local businesses, as well as engagement in soft tourism development.

Bremen

The Free Hanseatic city of Bremen, which comprises the two cities Bremen and Bremerhaven, is the smallest of the 16 German federal states. Bremen has a tourism strategy that focuses mainly on developing strategies and concepts, brand and marketing potential as well as city infrastructure. The topic of sustainable tourism, however, has not been considered yet with regard to tourism development in these cities.

Anyway, with institutes like the **Alfred Wegener Institute for Polar and Marine Research (AWI)** or the **Fraunhofer Institute for Wind Energy and Energy System Technology (IWES)** as well as the **Klimahaus Bremerhaven 8° Ost**, which is a science centre and adventure climate museum especially Bremerhaven is dedicated to climate protection and to becoming a so-called climate city.

Hamburg

The city state of Hamburg is located between Lower Saxony and Schleswig-Holstein. In alignment with the common Sustainability Goals of the Agenda 2030, the hanseatic city published a paper to initiate and realize the implementation of the UN SDGs in Hamburg and to form a Hamburg sustainability forum. The city focuses on topics such as fair trade, urban development and environmental protection. Under the term "**Green metropolis**", Hamburg's tourism marketing organisation informs on its online website about sustainable destinations within and outside of Hamburg, e.g. nature reserves, green transportation methods and eco-friendly accommodation, including city camping possibilities.

Hesse

Hesse lies in the centre of Germany. The federal state has a tourism strategy and a respective implementation management that focuses mainly on structural development and sustainability. Mobility is further an important topic to the state, as can be seen in the Hesse **mobility strategy 2035** that is also focusing on sustainable mobility in urban and rural areas. More than a third of Hesse's landscape are nature landscapes such as the **biosphere reserve Rhön**, the **UNESCO World Heritage National Park Kellerwald-Edersee**, the **nature park Lahn-Dill-Bergland** that is known as a premium hiking park or the **UNESCO Geo Nature Park Bergstrasse-Odenwald**.

Lower Saxony

Lower Saxony is located in the north-west of Germany directly connected to the North Sea. The federal state's landscape offers a variety of natural assets from the coast and East Frisian Islands in the north to moorland and heathland as well as nature parks and mountains in the south. Due to this, as well as one of its most valuable natural assets, the **UNESCO Wadden Sea World Natural Heritage site**, Lower Saxony's tourism strategy focuses strongly on climate change. In particular, Lower Saxony is the first federal state that started an extensive **project** named **"Tackling Climate Change - Adaptation Strategies for Tourism in Lower Saxony"** ("*Klimawandel anpacken – Anpassungsstrategien für den Tourismus in Niedersachsen*") to assess the impact of climate change on tourism and elaborate solutions to adapt to and prevent respective changes on regional level.

As Lower Saxony tourists increasingly seek for touristic offers that cover the topics nature and sustainability, active holiday as well as culture and health, Lower Saxony's marketing organisation recently launched the **campaign "Feel the vastness!"** ("*Fühl die Weite*!") to promote and refocus on nature tourism.

To foster **eco-friendly mobility** among visitors, the federal state invested in shuttle services from and to destinations such as the **Nature Park Lueneburg Heath** or the moorland **experience centre MOORWELTEN**.

Mecklenburg-Western Pomerania

The north-eastern German Federal State is bordering at the Baltic Sea and is known for its long coastline attracting high numbers of tourist every year. The interior of the country provides forests and lake-rich landscape that is, however, quite sparsely populated. The tourism

marketing organisation for Mecklenburg-Western Pomerania promotes sustainable holiday offers and regional destinations such as its **UNESCO Biosphere Reserves** "**Schaalsee**" and "**Südost-Rügen**" or **National Parks** "**Müritz**" and "**Vorpommersche Boddenlandschaft**". In this context, a special award for its biodiversity and outdoor experience was given to the **Peene Region in Western Pomerania** which strongly focuses on biodiversity conservation and launched the **lighthouse project "Peene Safari in a solar boat"**. Apart from this, the federal tourism marketing organisation informs about sustainability-certified accommodations, eco-friendly transportation possibilities and barrier-free/accessible tourism offers.

In reference to local food production and gastronomy the **initiative "ländlichfein"** (made up from the words "rural" and "fine") has been established by gastronomes, producers, food artisans and chefs.

North Rhine-Westphalia

In the West of Germany at the borders to the Netherlands and Belgium lies the Federal state of North Rhine-Westphalia. Like most federal states, North Rhine-Westphalia published a sustainability strategy as well as a tourism strategy. In the past North Rhine-Westphalia has been mostly associated with industrial landscape but developed more and more into a tourism destination for culture and recreational tourism as well as conference tourism offering MICE and event locations in urban areas. For example, the **project** "**Sustainable Bonn – Conference location of sustainability**" (*Sustainable Bonn - Konferenzort der Nachhaltigkeit*") engages in building a network for and promoting sustainable and certified event locations and accommodation in the city of Bonn. In the context of sustainable tourism, the state invests in green mobility by communicating biking and hiking trails connected to public transportation, supporting projects such as the **e-mobility project "Look! We are mobile"** ("*Schau' an! Wir sind mobil*").

Finalist of the Federal Competition for Sustainable Tourism Destinations in Germany and former winner of a special award for biodiversity are the **National Park** and UNESCO Global Geopark "**Nordeifel**". The destination has implemented several measures to contribute to climate protection such as the so-called **"The Eifel Climate Tour network"** ("*KlimaTour Netzwerk Eifel*") and invested in mobility concepts such as new local public transport free of charge for tourists with a GuestCard.

Rhineland Palatinate

Rhineland-Palatinate lies in the south-west of Germany surrounding the small federal state Saarland and bordering to Belgium, Luxemburg and France in the west. In the north, Rhineland-Palatinate is part of the Region Eifel that has the **UNESCO Global Geopark Vulkaneifel**. However, also places such as the **UNESCO world heritage Porta Nigra** as well as Rhineland-Palatinate's wine-growing regions are well-known throughout Germany. The state engages in campaigns such as information campaigns for tourism awareness rising and offers several **funding programmes for tourism infrastructure and (family-owned) businesses**, for example in LEADER Regions in Rhineland-Palatinate. The **destination Deutsche Weinstraße** (can be translated to: German wine street) is also a certified destination.

Saarland

Saarland is located in the south-west of Germany at the borders to France and Luxemburg. It is furthermore the first federal state that is **certified as a sustainable destination** by the consulting and certification organisation TourCert. Saarland offers a variety of nature parks such as the **nature park Saar-Hunsrück** or the **national park Hunsrück-Hochwald** as well as the **UNESCO Bliesgau Biosphere Reserve** that was a finalist of the 2016/2017 Federal Competition for Sustainable Tourism Destinations in Germany. To promote sustainable tourism arrivals, the **campaign "Säckchen füll dich"** (can be translated with "little bag, fill up!") was implemented that rewards guests that chose to travel by eco-friendly transportation with local products. Next to a **guest card** called **Saarland Card** that offers free bus and rail travel throughout the region, there are several other projects in Saarland that focus on green mobility by offering, for example, E-bike stations, shuttles and the so-called Velo Taxi in urban areas.

Saxony

The Federal state of Saxony is located in the East of Germany bordering Poland and the Czech Republic. Saxony defined a tourism strategy that focuses mainly on strengthening and developing the Saxony brand positioning the state as a competitive cultural tourism destination emphasizing on innovative and authentic tourism offers, for instance, the **competition for ideas regarding new and innovative touristic offers called "*So geht sächsisch*"** (can be translated to "Saxon goes like this"). Sustainability is a topic of Saxony's tourism strategy. Within the state the tourism association "Saxon Switzerland" is strongly committed to a sustainable tourism development as setting sustainability as a top priority of their tourism mission statement. Jointly with the same-named national park Saxon Switzerland, which is characterized by a landscape of forests, high plateaus, gorges and a rich flora and fauna, they strive to develop this destination in a sustainable manner, by especially using the synergies between nature conservation and tourism. This destination is highly committed to **eco-mobility projects and initiatives** that not only develop but also communicate innovative tourism-relevant modes of transport via e.g., interactive touchscreen information terminals.

Worth to be mentioned is also the **lighthouse project "Saxon-Bohemian Switzerland National Park Railway"** which connects two regional national parks and provides an attractive mode of transport for tourists and locals as well as the reopened transport hub **Bad Schandau Railway Station** that was awarded "Germany's first National Park railway station" merging different modes of transportation.

Saxony-Anhalt

The Federal state of Saxony-Anhalt is mostly associated with its Europe-wide remarkable density of **UNESCO world heritage places,** especially the "**Biosphere Reserve Mittelelbe**", and the "**National Park Harz**". Thus, the federal "**Tourism Masterplan 2027**" puts an emphasis on promoting the state as a modern cultural tourism destination while simultaneously developing and enhancing sustainable tourism development focusing on the state´s natural assets, and related places for water and outdoor tourism. In this context, the **"Natura 2000 information centre Home of rivers"** ("*Natura 2000-Informationszentrum Haus der Flüsse*") in the biosphere

reserve Mitelelbe fostering environmental education is worth to be mentioned. Cultural tourist attractions include the "Lutherstadt Wittenberg" and the city of Dessau known for its "Bauhaus-Architecture".

To contribute to climate protection, the regional **project "Show your green card"** ("*Grüne Karte zeigen*") offers tourists and locals the possibility to reduce their carbon footprint by supporting local tree plantings.

Schleswig-Holstein

The German federal state Schleswig-Holstein has a unique geographical position as it is located between the North Sea and the Baltic Sea. The tourism strategy of this federal state is currently updated and aims at integrating the topic of sustainability into all strategic fields. Furthermore, there is a focus on supporting SMEs in becoming more sustainable and crisis proof businesses and establishing networks as well as stakeholder dialogues in the tourism sector, which is institutionalized through the so-called **tourism cluster Schleswig-Holstein**. In the context of sustainable tourism, especially the sustainability **initiative** "**Happiness to the power of n**" ("Glück hoch n"; "n" standing for "sustainability" in the German language) was successfully promoting sustainable tourism in Schleswig-Holstein and boosting the topic of integrating sustainability measures into tourism offers and businesses. Furthermore, the **holiday region Schlei** is a certified destination.

To raise awareness for local food production and gastronomy, a network of agricultural producers, manufacturers, chefs, and gastronomers has been established that also created a **regional food label** of the same name "**Feinheimisch**" (made up of the words "fine" and "domestic").

Thuringia

Thuringia lies in the centre of Germany and is one of the smaller federal states. The state is especially known for its **UNESCO biosphere reserve Thuringian Forest**, that offers a variety of hiking and biking trails and is engaging in several projects and initiatives for sustainable regional development, eco-tourism and sustainable mobility as well as environment protection. For instance, the biosphere reserve is a destination of the public transport project "**Fahrtziel Natur**" and guests can also profit from sustainable mobility offers by using the so-called **Rennsteig-Ticket**. In the UNESCO biosphere reserve also the rural development and the topic of living and working conditions play a major role. A model project called **KOMET** took place until 2019 and focused on sustainable settlement development and sensitizing locals. It was followed by the **KOMET2 project** that dealt with vacancy management and job prospects in rural areas. Thuringia is also a pioneer in promoting and implementing barrier-free tourism.

4.10.2 Key Stakeholders

In German tourism policy there are numerous private, state and superior stakeholders with a large number of competencies and responsibilities.

4.10.2.1 Governmental and semi-governmental bodies

In Germany it is the **Federal Ministry of Economics and Energy** (*Bundesministerium für Wirtschaft und Energie - BMWi*) with its department "Tourism Policy", which is in charge of the making and designing of the tourism policy within the federal government. There is no central tourism ministry at the national level, which serves as a contact for all tourism-related issues. In fact, as tourism policy in Germany is a cross-cutting task, many individual questions fall as well in the responsibility of other federal ministries, e.g. questions concerning visa issues, minimum wages, working conditions or digitalisation including the sharing economy. Thus, almost all ministries are to different degrees responsible for various tourism policy tasks.

The main aim of the BMWi is to foster the development of tourism and to create framework conditions for a positive tourism development in Germany. In the frame of this course the BMWi strives to improve the competitiveness of tourism, supports SMEs and regional promotion programmes and facilitates measures to advance quality and sustainable tourism (Freyer, 2015).

Furthermore, it is committed to expanding international tourism relations as the BMWi represents Germany in European and international tourism questions, for example in the European Union, the United Nations World Tourism Organization, the OECD and in bilateral relations with other countries. In the course of this best practices for tourism policy are exchanged and measures to increase competitiveness, sustainability and social responsibility are developed. One example is the "European Capitals of Smart Tourism" competition, which has been held in 2019 and 2020 (European Capital of Smart Tourism, 2019).

Within the BMWi the **Advisory Board for Tourism Issues** (*Beirat für Fragen des Tourismus*) was set up in 2016. The Advisory Council for Tourism Issues advises the Federal Minister of Economics and the Federal Government Commissioner for Tourism. This advisory board was set up with the intention of bringing together the interests of politics, business, science, associations and other parties involved in tourism. It is composed of representatives from companies and associations of the tourism industry, carrier of transport, destinations and science. With this concentrated and manifold professional competence, the board supports the opinion-making of the ministry. The aim is to strengthen tourism in Germany and to improve the framework conditions for it (BMWi, 2021). Tourism policy is also co-determined by the **Full Committee for Tourism in the German Federal Parliament** (*Deutscher Bundestag*).

In order to further institutionally strengthen the federal government's promotion of tourism and the knowledge transfer and the networking between business, science and politics, the Federal Ministry of Economics has set up a **Federal Tourism Competence Centre** (*Kompetenzzentrum Tourismus des Bundes*). Above all, the competence centre mainly supports the operational implementation of the government's tourism policy goals by observing and analyzing economic, technical and social developments of tourism in Germany and

accompanies innovations. An important component is the **special module "Tourism 2030"**, in which long-term scenarios and perspectives for tourism in Germany are developed together with relevant players in the tourism industry and under scientific supervision (Tourismus 2030, 2021).

The coordination of the tourism policy of the federal and state governments takes place in the **federal-state committee tourism** (*Bund-Länder-Ausschuss – BLA*) chaired by the BMWi. In addition to the BMWi the federal state ministries responsible for tourism are represented in this committee (Freyer, 2015).

Federal Ministries especially dealing with issues regarding the development of sustainable tourism include the **Ministry of the Environment, Nature Conservation and Nuclear Safety** (BMU – Bundesministerium für Umwelt, Naturschutz und nukleare Sicherheit), the **Ministry of Development Cooperation** (*Bundesministerium für wirtschaftliche Zusammenarbeit - BMZ*) and the **Ministry of Labour and Social issues** (*Bundesministerium für Arbeit und Soziales – BAS*).

4.10.2.2 Tourism Associations

At national level various umbrella associations, in which sub-organisations subject-specifically merge, represent the tourism policy related interests of the tourism industry. The most important associations and their competencies are presented in the following section.

Within tourism policy, the **German National Tourism Board (GNTB,** *Deutsche Zentrale für Tourismus - DZT*) is the central organisation for internationally promoting and marketing Germany as a travel destination (on behalf of the German government). Thus, they strive to communicate the diverse appeal of the country to an international market aiming to increase the travel volume to and in Germany, to strengthen the positive image of Germany as a travel destination as well as tourism as an economic factor contributing to income and employment. To this end, the GNTB maintains country representatives all over the world, who work primarily with local travel companies and the media, at the same time it cooperates closely with many companies in the German tourism industry (to market Germany as a travel destination, in order to optimally position Germany as a travel destination in the world) (DZT, n.d.-a).

Besides the international marketing for Germany the GNTB takes on tasks including domestic marketing activities, topic-related marketing and product development as well as market analysis and studies. It also plays an important role in the collaboration between the federal government and the tourism industry (Freyer, 2015).

The GNTB has been dealing with the topic of sustainability for many years. Within the scope of their involvement with sustainability issues, positioning Germany as a sustainable travel destination is a strategically the most important task for the GNTB. The sustainable action taken to achieve this is primarily based upon three pillars: Product development, referring to a proactive participation in development of tangible sustainable offers, a communication strategy, which communicates sustainability as a brand essence of the destination Germany as well as the GNTB´s internal sustainability initiative, which integrated sustainability practices

within internal processes and daily business operations certified by Green Globe. Specific activities range from climate-friendly mobility and orientation for customers who are interested in sustainable offers in the catering and hotel industries to barrier-free tourism. A new micro-site of the GNTB "Sustainable Travel Deals in Germany" provides comprehensive information on, among others, climate-friendly travel, sustainable accommodation, green meetings, slow travel and natural landscapes (DZT n.d.-b).

For the development and further implementation of this topic it has especially set a separate department "Innovation Management". Entsprechend ihrer Satzung legt die DZT Wert auf die Einbeziehung und Förderung kleiner und mittelständischer Unternehmen in ihr Engagement. The GNTB is currently financed to about 90% by the federal government (Ministry of Economic Affairs). It is furthermore supported by its members and sponsors including tourism companies and (state) marketing organisations as well as important tourism industry associations.

In addition to the DZT, several other tourism industry associations are actively operating at federal level, the most relevant ones include the **Federal Association of the German Tourism Industry** (*Bundesverband der deutschen Tourismuswirtschaft - BTW*), **German Tourism Association** (*Deutscher Tourismusverband e.V. - DTV*), **German Travel Association** (*Deutscher ReiseVerband - DRV*) and **the German Hotel and Restaurant Association** (*Deutscher Hotel- und Gaststättenverband - DeHOGA*). All these associations try to influence tourism policy in the interest of the members they represent. They are all to a more or less extent involved and active in the promotion of sustainability with the tourism industy.

The **Federal Association of the German Tourism Industry** (*Bundesverband der deutschen Tourismuswirtschaft - BTW*) is the umbrella organization of the German tourism industry, which represents the common, overlapping interests and needs of the industry. Its spectrum of members, which ranges from air, road and rail transport to hotels and restaurants, tour operators and congress centres to tourism marketing organisations including the following four head associations DZT, DTV, DRV and DEHOGA.

The main goal of the BTW is to secure Germany as an important tourism site. It therefore calls for reliable framework conditions for the entire tourism industry, the recognition of the importance of the tourism industry, the reorganization as well as the depletion of taxes, duties and regulations. With regard to sustainability issues BTW focusses on climate protection, especially in regard to a climate-friendly and optimized intermodal mobility approaches, as well as human rights and child protection.

The **German Tourism Association** (*Deutscher Tourismusverband e.V. - DTV*) is the umbrella association of municipal, regional and state tourism organisations as well as particular cities and is committed to the successful development of tourism in Germany. It is financed exclusively through membership fees. The three municipal umbrella organizations (German Cities and Community Association, Association of German Cities and Towns, National Association of the 294 Counties) and supporting members, who are closely related to tourism in Germany, are also represented in the DTV. Thus, the German Tourism Association represents almost all tourism stakeholders in German tourism.

Among other things, the DTV advocates for the relief of small and medium-sized businesses, the improvement of the bookability of tourist offers, the quality assurance of tourist offers and tourism policy-related questions. Furthermore, the DTV is explicitly committed to foster sustainable development in tourism in Germany and is active to direct the interest of tourism players to achieve the best possible sustainable results in the scope of their operations and activities. Their commitment is manifested in their position paper "Tourism and Sustainable Development in Germany", which was elaborated and published in 2012 in cooperation with the municipal head organisations (kommunle Spitzenverbäde) (DTV, 2021).

The **German Travel Association** (*Deutscher ReiseVerband - DRV*) is the leading representation of the travel industry in Germany. It mainly comprises tour operators and travel agencies of all organisational forms and sizes but as well individual touristic service providers and service providers and represents their interests at political level and towards the public in Germany as well as abroad. The member companies generate around 90 percent of the turnover in the German tourism industry (DRV, 2021). In addition to advising its members on applicable travel and competition law as well as general terms and conditions it also makes market research and data and information on the use of communication technologies available to members (Freyer, 2015). Beyond, the DRV is committed to promoting young professionals in the travel industry and therefore provides advanced training through various seminars and courses. The aim of their industry-wide training campaign is to increase the number of trainees as future tourism employees.

With regard to sustainability the DRV is primarily involved in activities concerning human rights and child protection and as well supports the UN-Climate Goals as agreed upon in Paris (Paris Declaration) One of their sustainability projects is the **Ecotrophea Award** recognizing innovation and exemplary sustainability project in the tourism industry.

The **German Hotel and Restaurant Association** (*Deutscher Hotel- und Gaststättenverband - DEHOGA*) is the umbrella and branch association for the hospitality industry in Germany and, in this role, acts as a representative of the interests of its members, the hotel industry. The DEHOGA is responsible for hotel classification; it also has starte the DEHOGA Climate Campaign and developed the DEHOGA Umweltcheck, which gives the member hotels and restaurtant the opportunity to check their environmental performance.

There are two German tourism associations, which are explicitly committed to sustainable tourism.

The **Forum Aanders Reisen e.V**. (**FAR)** (forum to travel differently) is an umbrella association of small and medium-sized tour operators, which strives for a tourism that is ecologically sustainable, economically feasible and ethically and socially just in the long term. Their members have committed themselves to this in an extensive catalog of criteria, which are validated / checked in compliance with what is checked in the scope of an CSR process. In the public and in politics the FAR creates a stronger awareness of the ecological, economic and socio-cultural effects of tourism and sets important impetus / impulses for sustainable and fair tourism. The umbrella association was founded in 1998 and today has 137 member companies (as of June 2021) (FAR, 2021).

Futouris e.V. calls itself the sustainability initiative of the German Tourism Industry. Formally organised as an association the initiative jointly realizes innovative and applicable measures and projects to preserve tourism destinations and to support the industry to become more sustainable. The members work together around the world to improve living conditions, preserve biological diversity and protect the environment and the climate. They have set themselves the goal of providing long-term, comprehensive and sustainable help. All measures are planned and implemented in intensive exchange with the local communities (Futouris, 2021).

Some of the tourism segment-related associations incldue the **Federal Association of Canoe Tourism** ("Bundesvereinigung" Kanutouristik) and the hiking association **"Wanderbares Deutschland"** as well as the **German Spa Association** (*Deutscher Heilbäderverband*), which represents members in the field of health and wellness tourism in Germany. Members are spas and health resorts, spa doctors and members of the scientific association for spa and climate science.

4.10.2.3 NGOs, Sustainable Tourism Networks and Partnerships

There are various non-governmental organisations dealing - in one way or another – with the sustainable tourism supporting the sustainable tourism management and development in the German tourism market. Most of them focus on specific topics of sustainability, thus, they either put an emphasis on the ecological or on the social-cultural sustainability of tourism. The most relevant non-governmental organisations operating in Germany are presented below.

A central and one of the largest nature conservation and environmental NGO in Germany is the **WWF (World Wildlife Fund) Germany** (*WWF Deutschland*). They support and promote sustainable forms of tourism and respective offers with low impacts on the environment, which at the same time contribute to the preservation of nature, e.g. protected areas, and the sustainable use of natural resources. In many **WWF** project areas, tourism serves as a strong partner in promoting nature conservation goals. The current focus of the WWFs tourism is set on the topics plastic waste on coasts and in the seas, climate-friendly mobility, sustainability certification in tourism and community-based tourism in developing countries (WWF, 2021).

Two other well-known environmental NGOs in Germany are the Bund für Umwelt und Entwicklung Deutschland (e.V.) and the **Nature Friends Germany** (*Naturfreunde Deutschland*) both supporting a sustainable tourism development in Germany by working on solutions for existing problem areas and the dissemination good practice examples. Under the umbrella of the brand **BUND-Reisen** hiking study trips are offered in Germany and Europe in close cooperation with BUND. The trips are conducted in regard to ecological aspects and mostly by train. In order to make an effective contribution to climate protection air travel is not offered at all (BUND-Reisen, 2021).

The **German Alpine Association** (*Deutscher Alpenverein - DAV*) is an independent mountain sports and nature conservation association committed to the nature-, environmentally- and climate-friendly exercise of mountain sports and the ecological alignment of the associated infrastructure. It promotes mountain sports and alpinism while at the same time supporting the preservation of the unique natural and cultural areas of the Alps and the German low

mountain landscapes, thus striving to balance the interests of the mountaineers and the conservation of nature. Furthermore, the DAV fosters to raise the awareness of its members for nature and environmental protection. Another focus is set on the promotion of sustainable mobility concepts in the Alps as well as activities/projects concerning climate protection and climate-friendly consumption.

Two smaller environmentally-oriented organizations with a focus on sustainable tourism are **kate - Environment & Development** (*kate - Umwelt und Entwicklung e.V.*) and the **Association for Ecological Tourism in Europe** (*Verein Ökologischer Tourismus Europa e.V. - Ö.T.E*).

Kate is a non-profit, advisory and educational organisation that aims to support sustainable economies and lifestyles through environmental and development policy actions. Sustainable tourism is one of their topics and fields of work, which is promoted in form of various projects in Germany and around the world. These include the fairwärts competition as well as projects in the area of community-based tourism. Kate also runs the knowledge portal Sustainable Travel Destinations. **Ö.T.E.** is a non-profit interest group, founded originally by nature, environmental protection and leisure associations, which support an ecologically and socially sound tourism development in regions, e.g. protected areas, and are – alone or in cooperation with other organisations – carrying out respective projects in Germany and abroad in European Countries. Ö.T:E. has been the coordinator of the **working group "Tourismus and biological diversity"**, in which national associations from nature and environmental protection, leisure, sport and tourism collaborate to promote sustainable tourism in compliance with the conservation of biodiversity.

There are furthermore some NGOS which are primarily committed and focus their work to strengthening the social and cultural dimensions of sustainability in tourism. Most relevant are the following:

ECPAT Germany (*ECPAT Deutschland e.V. – Arbeitsgemeinschaft zum Schutz der Kinder vor sexueller Ausbeutung*) is a nationwide association working to ensure that the UN Convention on the Rights of the Child is observed, causes of disregard are identified and violations are prosecuted with all available means. The organisaton is involved in various fields of work such as politics, justice, economy and education, and carries out campaigns and projects in cooperation with governmental and non-governmental organizations in order to raise public awareness develop preventive measures and create a legal basis for the protection of children through. ECPAT Germany is a member of ECPAT International, an international children's rights organization based in Bangkok, Thailand.

Tourism Watch – Information Service Tourism and development (*Tourism Watch – Informationsstelle Tourismus und Entwicklung*), as a department of the politics division of the church-based development organisation **Bread for the World** (*Brot für die Welt*), works together with ecumenical partners from all over the world for a sustainable, socially responsible and environmentally friendly tourism development, especially focusing on the sustainable development through tourism in countries of the global south. An emphasis of their work is the engagement with human rights in tourism as well as global justice and a stronger participation in decision-making process of tourism stakeholders in development

countries as a basis for a sustainable tourism development at site. Besides, they support topics concerning the protection of the environment (e.g. climate justice) as well as corporate responsibility. Among other activities they participate in discussions and dialogue fora in Germany and internationally with relevant decision-makers from politics, tourism managers and representatives of travel companies (that are aimed at making tourism more sustainable), e.g. Round table human rights or Sector dialogue on tourism organised by the German Federal Ministry for Economic Cooperation and Development (Brot für die Welt, 2021).

The **Institute for Tourism and Development** (*Studienkreis für Tourismus und Entwicklung*) is a non-profit organization thematically focused on the subject "Tourism in developing and emerging countries". In the scope of its work dealing critically with the opportunities, risks and responsibility of tourism developments it is active in tourism research and consultancy, development-related education and information in tourism and is involved in the public debate of tourism issues, Specific activities and projects include the editing of material for publication, e.g. the “Sympathy Magazines”, the organization of contest, e.g. “To-Do Award”, or the offer of trainings for people employed in the tourism sector, e.g. the “International Tour Guide Qualification”. (Studienkreis für Tourismus und Entwicklung, 2021a)

4.10.2.4 Relevant research and educational bodies

The **Eberswalde University for Sustainable Development (HNEE)** is one of the leading German universities in the field of sustainable development focusing its teaching and research in four main fields and faculties: Forest and Environment, Landscape Management and Nature Conservation, Wood Engineering and Sustainable Business including sustainable tourism management. The **Master's Course “Sustainable tourism management”** links economic with ecological and social-science content and is, in terms of sustainability, very interdisciplinary and therefore unique in the German-speaking world. (The teaching areas include: "Tourism, Environment and Society", "Sustainable Destination Development" and "Sustainable Destination and Protected Area Management", "Tourism Economics", "Marketing Management", "Sustainable Business Management" and "CSR in Tourism".)

The **Centre for Sustainable Tourism (ZENAT)** is an association of professors and further tourism experts at Eberswalde University for Sustainable Development. It was founded in 2014 and serves as a think tank dedicated to the research, generation and dissemination of new knowledge on sustainable tourism and the development of strategies and concepts to implement the idea of sustainable tourism into practice at a destination as well as on corporate level. The centre places great importance on cross-linking scientific research and practice. Its members have a large network of cooperation partners at higher education institutions, in the tourism industry and in environmental and nature conservation organizations as well as in development cooperation. In addition, the members of ZENAT are involved in various advisory councils and juries of initiatives and projects for sustainable tourism management or of awards on this topic. (ZENAT, 2021)

Another **master’s course** with the topic **“Sustainable Tourism Development”,** which is offered at **Heilbronn University** (*Hochschule Heilbronn*), also combines the economic field of tourism with the competence field of sustainability. It combines tourism with the areas of public

economy, management, geography and law with sustainability topics. A focus is set on the planning and sustainable development of tourist destinations (Hochschule Heilbronn, 2021).

A **bachelor's degree** in **"Sustainable Tourism Management**" is offered at the **Rhein-Waal University of Applied Sciences** (*Hochschule Rhein-Waal*). With a focus on sustainable development, it combines content from the disciplines of economics, law, geography, sociology and ecology and therewith aims to impart how to make tourism more environmentally and socially acceptable in order to create a balance between social, ecological and economic requirements. (Hochschule Rhein-Waal, 2021).

Two other research institutes that deal with questions of sustainable development in tourism are the **Institute for Sustainable Tourism** (*Institut für nachhaltigen Tourismus*) at the **Harz University of Applied Sciences** (*Hochschule Harz*) and the **German Institute for Tourism Research** (*Deutsches Institut für Tourismusforschung – DIFT*) at the **West Coast University of Applied Sciences** (*FH Westküste*).

4.10.2.5 Individual tourism business and destinations of particular relevance

As could be seen in the chapter about sustainable tourism policies and strategies at regional level, there are quite many certified and awarded businesses and destinations among all federal states that are committed to sustainable tourism development. However, there are few examples that are of particular relevance for the entire German tourism industry due to their extraordinary sustainability effort and their respective function as role model businesses or destinations.

One of these examples is the destination **North Sea Island of Juist** (*Nordseeinsel Juist*) which is one of the East Frisian Island that are located in the Lower Saxony Wadden Sea National Park. The island's sustainability policies and strategies focus on a variety of action fields but especially in education, participation, research and development the island stands out for its commitment. For instance, not only tourism stakeholders and local people are involved in tourism planning processes but also tourists are invited to actively participate and contribute to the island's development in a so called *"Guest parliament Juist"*. As a biodiversity-rich island located in the UNESCO Wadden Sea World Natural Heritage site, Juist engages strongly in nature conservation, e.g. by implementing a targeted visitor management focusing on enjoyable environmental education. However, the biggest effort is made in the field of climate action for which the island has received several awards. Juist has the ambitious goal of becoming climate-neutral by 2030 which is embedded in well-elaborated strategies for climate neutrality and protection. The island has the first climate neutral tourism information office in Germany and focuses on educating tourists, businesses and locals, especially children, about sustainability and other related topics such as climate change. Additionally, a project about climate change adaptation was initiated to help tourism stakeholders to cope with future challenges and impacts. Besides the local initiative *"Juistus Klimaretter"*, a campaign that rises climate action awareness among guests and also benefits tourism service providers that engage in climate action, Juist received recognition and a tourism award for its lighthouse project *"Juist Unplugged – Sustainability behind the scenes"*, which consists of an island bike

tour. Along this tour guests learn about and get to know sustainability-related and climate change-affected locations as well as respective community engagement (DTV, 2017).

An example for an individual business of particular relevance for the German tourism industry is the **tour operator "Studiosus**". The independent business that offers climate-neutral study tours worldwide is committed to sustainability on various levels. The company has a systematic environmental and sustainability management that is EMAS-certified and transparently communicated via an annual sustainability report. Studiosus focuses on tours that align with sustainable and responsible travel and has additionally supported over 120 social, ecological and cultural humanitarian projects via its organisation "Studiosus Foundation e.V.". Especially remarkable, however, is that Studiosus calculates and compensates greenhouse gas emissions not only from their company location but also the emissions that occur along the tours' value chain, including flight, transportation and accommodation plus meals (Studiosus, n.d.).

4.10.3 Activities and instruments for the development of sustainable tourism

4.10.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Of the many projects and initiatives of tourism stakeholders among Germany, a few recent ones that have been relevant at national level will be introduced in the following.

Of significant relevance for sustainable development in Germany is the **National Climate Protection Initiative** (*Nationale Klimaschutzinitiative - NKI*) of the Federal Ministry for the Environment, Nature Conservation and Nuclear Safety. The NKI supports and initiates climate protection projects throughout Germany (bmu, 2022). One project that has been relevant for the tourism industry is **Klima-Cent**, a project establishing an industry-appropriate financing instrument for achieving measurable greenhouse gas reductions in the national tourism industry, resulting in the so-called **Deutscher Klima Fonds Tourismus (DKT)** (Fraunhofer-Gesellschaft, n.d.).

A project that also has been influencing the travel industry at national level is the project **Green Travel Transformation** that was managed by the organisation Futouris in cooperation with, among others, the German Travel Association (Deutscher Reiseverband, DRV). The project focused on increasing transparency about sustainable travel in customer information services and resulted in the development of an industry-standardised label for sustainability certified hotels (DRV, 2022a). Within this project the DRV developed the so-called **Green Counter**, a free of charge E-Learning programme for travel agencies to learn about sustainability and sustainable travel. Additionally, travel agents receive training in how to integrate the topic sustainability into their customer service (DRV, n.d.).

For the post-pandemic restart of the travel industry the DRV recently launched an Instagram campaign named **#reisebewusst** (i.e. both 'travel-conscious' and 'travel consciously!') that shall raise awareness for social and ecological issues connected to travel. Due to a higher demand and consciousness regarding sustainability among travellers and the recent pandemic, people are expected to have a higher need and appreciation for sustainable tourism offers. Therefore, the DRV uses the social media platform Instagram to weekly post tips and tricks

under the hashtag "#reisebewusst" concerning conscious travel. The tips and tricks have been elaborated by DRV sustainability experts and deal with topics such as travel preparation, eco-friendly arrival and departure, conscious use of water or prevention of plastic waste (DRV, 2021).

In June 2020 with support of the German Federal Ministry for Economic Affairs and Energy, the organisation TourCert launched the **Excellence Initiative Sustainable Destinations** (Exzellenzinitiative – Nachhaltige Reiseziele). The project aims at forming a nationwide network of exchange and support for destinations by bringing together tourism stakeholders, such as DMOs, tourism service providers and institutions, from all over Germany to work on current challenges in the tourism industry, promote sustainability management and respective joint projects as well as to share and evaluate sustainability performance (TourCert, 2022).

As a result of a cooperation between the German railroad company *Deutsche Bahn* (*DB*) and the environmental organisations *Bund für Umwelt und Naturschutz Deutschland* (*BUND*), *Naturschutzbund Deutschland* (*NABU*) and *Verkehrsclub Deutschland* (*VCD*), a project for environmentally friendly mobility and sustainable nature tourism was initiated called **Fahrtziel Natur**. The project's aim is to achieve a shift in touristic traffic in sensitive natural areas from private car use to public transportation to reduce CO_2 emissions and to contribute to climate protection and biodiversity preservation. Fahrtziel Natur has been awarded as official project of the UN Decade Biodiversity and received a mobility prize in the category International Best Practice. The cooperation is already covering 23 regions, such as national parks, biosphere reserves and nature parks, all over Germany that contribute to developing and implementing green mobility concepts combined with attractive tourism offers (DB Fernverkehr AG, n.d.-a).

In the field of social sustainability engagement, the multi-stakeholder initiative **Roundtable Human Rights in Tourism** should be mentioned, which is organised as a non-profit association in Germany. Roundtable Human Rights in Tourism functions as an international open network following and promoting the UN Guiding Principles on Business and Human Rights to help businesses, organisations and institutions in tourism preventing, addressing and dealing with human right abuses along the supply chain.

Digitize the Planet is an initiative of the same-named non-profit organisation, representing various stakeholders from outdoor sports, conservation and destinations, that aims at digitizing all relevant regulations, including laws and local rules for the outdoor use. Together with all stakeholders from protected areas, tourism and outdoor sports, it strives to develop a responsible relationship between the natural environment and the people through standardized and internationally digitized rules. For this, data is required that represents both information on conservation and its legal foundations. This data must be structured in a geo-referenced form, compiled in a machine-readable manner, digitized and processed. These open data shall then be made available across all internet portals as a means of distributing it to users. (Digitize the Planet e.v., n.d.).

A rather specific but well-established initiative is the **This is how the mountains taste** (So schmecken die Berge) campaign supported by the German Alpine Association (Deutscher Alpenverein, DAV). The initiative started in 1999, was later joined by Austrian and South Tyrol

alpine associations and partners and fosters cooperation among lodge hosts, alpine farmers and local food producers in alpine destinations. The initiative's core objectives are, among other things, the promotion of the regional economy and considerate use of resources and energy (DAV, n.d.).

Last but not least to be mentioned are the sector projects of the organisation **Futouris**, the sustainability initiative of the German tourism industry. Futouris launches constantly and regularly **projects in the field of sustainable tourism** that form partnerships and foster a network of tourism stakeholders within and outside Germany. Current projects deal with developing a standardised assessment tool for CO_2-emissions among travel packages (climate protection), awareness-rising for the protection of bees (biodiversity preservation) and reducing single-use plastics (environmental education) (Futouris, 2021; n.d.-b; n.d.-c).

4.10.3.2 Marketing and information services supporting sustainability in tourism

Regarding marketing and information services that support sustainability in tourism at national level and are relevant for the German tourism industry, a few will be named and briefly explained in the following.

One of the biggest tourism platforms that serve as a knowledge base and networking instrument is the **Tourism2030 portal** which was developed by ECOTRANS, a European network of experts and organisations that was founded in Berlin. Originally launched as **DestiNet** portal, Tourism2030 aims at globally connecting people and organisations that engage in making the tourism industry more sustainable. For this, the portal offers a free of charge knowledge data base, networking possibilities and a variety of other web-based services. To be guided through the portal, the Tourism2030 compass provides the user with a tool to get information in regard to the overall themes: Topics, Events, Courses & Resources, Good Practice, Who's who, Services, Market Place, and News. (Tourism2030 Portal, 2021)

Another valuable information service that recently launched in April 2021 is the innovative online portal **Wissensportal Nachhaltige Reiseziele** (knowledge portal sustainable destinations). The portal is organized by *TourCert*, *KATE*, *EcoTrans* and the *Excellence Initiative Sustainable Destinations*, and is supported by the *German Environment Agency* (Umweltbundesamt, UBA) and the *Federal Ministry for the Environment, Nature Conservation and Nuclear Safety* (BMU). The aim of the website is to provide German tourism stakeholders, such as DMOS, businesses, associations but especially employees working in destination management and – marketing, with a variety of valuable information regarding action fields in sustainable tourism development. The website also published the so-called **Grüne Reisekarte Deutschland** (Travel Green Germany), which is used by the DZT and other international booking and marketing systems and displays sustainability-certified businesses and destinations throughout Germany. The Travel map, however, was developed by EcoTrans and is therefore also published on the Tourism2030 portal as one of the global **Travel Green Maps** that indicate certified tourism offers worldwide**.** (Wissensportal Nachhaltige Reiseziele, 2021)

To cope with the impacts of the Corona pandemic and to make the case for sustainable travel in form of a marketing service, the German National Tourism Board (Deutsche Zentrale für Tourismus e.V., DZT) launched the microsite **Feel Good - Nachhaltiges Reisen in Deutschland**

(Feel Good - Sustainable travel in Germany) that exclusively aims at internationally promoting certified and sustainable tourism offers throughout Germany. Respective information and offers were collected and published by the DZT in cooperation with federal marketing organisations and extern sustainability experts. Besides offers and information regarding cities, regions, mobility offers, accommodation and travel experiences, the website also provides tips for sustainable travel, an integrated carbon footprint calculator as well as an interactive map of certified accommodation providers. (DZT, n.d.-b)

4.10.3.3 Tourism Sustainability Certification Systems and Awards

In recent years there has been a significant growth of certification systems, schemes and labels as well as awards, also in the German tourism industry. Some of those of relevance for German SMEs and destinations in the context of sustainable tourism will be briefly described in the following.

Regarding sustainable tourism certification, one of the leading organisations at national level is the TourCert gGMbH. TourCert provides not only tourism certification to tourism enterprises, such as tour operators, accommodation providers or incoming agencies, as well as destinations in form of its **TourCert** label but also supports and accompanies SMEs and destinations along the whole process of developing and integrating sustainability management. (Tourcert, 2021)

Viabono is an independent and leading professional organisation for environmental or sustainability certification in the leisure and tourism industry in Germany. With the **Viabono** label, the company offers certification for accommodation providers, including hotels, gastronomy, youth accommodation, cottages and campsites, and focuses on the topics energy, CO_2 emissions, water, and waste management. Additionally, accommodation providers must offer regional and fair-trade food. Besides this label, Viabono also offers carbon footprint assessment with respective climate efficiency classification (A-F). (Viabono, 2021)

Another and very similar sustainability certification for hotels is offered by the InfraCert GmbH with its label **GreenSign Hotel**. The label aligns with international frameworks for sustainability and evaluates hotels' sustainability performance in form of levels (1-5) based on a holistic set of criteria. A carbon footprint assessment is also included. Besides the GreenSign Hotel label, InfraCert established a **GreenSign SPA** label as well. Although the GreenSign label is claimed to be market leader in the German hotel industry, InfraCert is rather recognized on international level. (Greensign, 2021)

The **Ecocamping** label was developed by the same-named organisation Ecocamping e.V. which strives to enhance environment and nature protection as well as quality and safety in the camping industry. Ecocamping's objective is to support camping businesses in continuously improving and developing their environmental performance. The label is based on the Eco-Management and Audit Scheme (EMAS) and requires the camping business to engage in training, developing an action plan, as well as publishing an Ecocamping report. (Label Online, 2021)

Regarding competitions and awards that are of relevance for sustainable tourism in Germany, the most are organised or financed by official institutions like the ministries of the German

government to support nationwide sustainable development. There is also a number of competitions and awards at regional level which are organised by the Federal states and respective ministries to boost engagement of businesses and destinations at regional and local level. However, also individual NGOs and tourism associations and networks engage in awarding sustainability commitment and best practices.

One of the most relevant instruments at national level to award the engagement of tourism destinations and to promote sustainable tourism development, especially in rural areas, is the **Bundeswettbewerbs Nachhaltige Tourismusdestinationen** (Federal competition for Sustainable tourism destinations). So far, the competition has been taking place twice and is organised by the German Tourism Association (DTV), supported by the Federal Agency for Nature Conservation (BfN) and financially supported by the Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU). The contestants are evaluated regarding ecological, economic, social and management-related sustainability criteria and can be awarded as winner destination, finalist or special award recipient. Apart from that, the competition helps to strengthen the commitment of tourism managers and businesses and to promote best practices to a broad public. (Bundeswettbewerb Nachhaltige Tourismusdestinationen, 2021)

A competition, which is also an awareness rising- and education project is **fairwärts** (consisting of the words *fair* and *forward*), which is carried out annually by the consulting (and educational) organisations ***kate Umwelt & Entwicklung e.V.*** **and** ***TourCert*** **and financially supported by the** German Federal Ministry for Economic Cooperation and Development (BMZ). Each year the competition has a thematic focus in the field of sustainable tourism by which national tourism companies and organisations can apply with their innovative ideas, projects or activities (KATE e.v., 2021).

Another relevant award at national level is the **Fahrtziel Natur Award** organized by the same-named cooperation, as described in chapter 4.1.3.1, that awards already implemented role model projects connecting sustainable tourism and eco-friendly mobility in German protected areas that are members of the Fahrtziel Natur cooperation. Since 2009, the award has already been taking place seven times, about every two years, and comes with a communication package worth 25,000 euros consisting of media services from the cooperation partners (DB Fernverkehr AG., n.d.-b).

The international DRV **EcoTrophea** award recognizes innovative and exemplary sustainability projects in the tourism industry. It has been awarded annually by the DRV since 1987. The award is given to individuals, groups, organizations, companies or municipalities who have made an effective, exemplary and innovative contribution to environmentally and / or socially compatible tourism as defined by the association (DRV, 2022b).

As the Alpine region is especially impacted by the climate change and simultaneously quite dependent on tourism, a competition has been established in 2018 in climate protection and energy efficiency for hotel industry and gastronomy in the Alpine region called **ClimaHost**. The competition is carried out by the German consulting company Adelphi in collaboration with the Alpine Convention and is supported by the German Federal Ministry for the Environment,

Nature Conservation and Nuclear Safety (BMU). Businesses in the Alpine region can apply in three categories: *new buildings*, *existing buildings* or s*pecial award "local hero"*, which is for small enterprises with less than ten employees. To evaluate the touristic offers' sustainability, a set of criteria was elaborated concerning environment and climate, mobility, purchase and procurement, management and communication as well as socio-cultural aspects. Apart from the award, finalists receive a professional image video for marketing purposes. The aim of the ClimaHost is to support accommodation providers that implement climate protection measures and contribute to sustainable tourism offers in The Alpine region (adelphi research gemeinnützige GmbH, 2021).

Also worth to be mentioned is the **TO DO Award** organised by the German NGO called Institute for Tourism and Development (Studienkreis für Tourismus und Entwicklung e.V.) that awards tourism projects in which the local population is closely involved in planning and implementation, resource efficiency is practiced and sustainable local economies are created. The award ceremony takes place every year at the ITB Berlin and the contest is supported by the German Federal Ministry for Economic Cooperation and Development (BMZ) as well as other relevant German tourism stakeholders plus the Swiss Foundation for Solidarity in Tourism. However, the award is not limited to German tourism projects but rather focuses on projects all over the world (Studienkreis für Tourismus und Entwicklung, 2021b).

Although the **German Sustainability Award** (Deutscher Nachhaltigkeitspreis, DNP) is not exclusively linked to tourism but rather focuses on broader categories such as companies, design, architecture or cities and municipalities, the DNP is worth to be mentioned as it is the biggest award of its kind for ecological and social engagement in Europe. The DNP is a multi-stakeholder project that cooperates closely with the German Federal government, which uses the award as a measure of the German Sustainability Strategy in alignment with the Agenda 2030 SDGs. Due to their sustainability engagement, there has been a variety of tourism-related stakeholders such as destinations or businesses that have been awarded with the DNP (Stiftung Deutscher Nachhaltigkeitspreis e.V., 2021).

4.10.3.4 Capacity Building for Sustainable Tourism

As a very dynamic economic sector, tourism is subject to permanent change. This requires employees in tourism companies and in the travel regions in Germany to constantly adapt their own skills through lifelong learning, which, as well as sustainability, as two social developments, will in the future become more and more relevant.

In Germany, all forms of private and work-related advanced education and trainings are assigned to the so-called quaternary field of education, while the OECD assigns it to the tertiary area. In addition to informal learning as an important part of further education, which is rather difficult to identify, the formalized advanced education includes vocational as well as general and political education and trainings, thus all kinds of courses being taken after entering the professional life.

There is currently a large number of private and public educational institutions at the German education market that provide advanced education and training offers for all kind of target groups and for a great variety of topics. In addition to private institutions, the providers

include institutions of the churches, trade unions, the chambers and specific education institutes as well as universities or university institutes. A new trend is E-learning or Online-Learning, which is becoming more and more popular, especially in the area of further education.

Across Germany various institutions offer training courses as well as further education in the field of tourism and tourism management, online and in-person, which help businesses and destinations in understanding their options to reduce negative impacts and to raise economic, socio-cultural and environmental benefits for their tourism activity. However, in the context of these tourism-related educational offers, there are comparatively few offers that explicitly deal with sustainable tourism or certain aspects of sustainable tourism. Advanced training courses that generally deal with the topic of sustainability or individual aspects of sustainability are more frequent and are increasing steadily.

Anyhow, training systems specifically related to sustainable tourism include among others the folloing ones:

The **IST Study Institute** offers a 6-month distance learning course on sustainable tourism, in which the participants deal with the topics quality, environmental protection, climate, culture and religion, and sustainable corporate management in connection with questions and tasks of tourism.

Blue Contec GmbH offers a live online course on **“Sustainability as a Business Model”**. This training strives to provide answers to the questions of what can be learned from the Covid-crisis and how sustainability can get started and implemented as a success factor in the hotel business or destination in the future.

Capacity building with regard to sustainability issues in tourism is also provided by certification agencies. In Germany **Tourcert** is especially active in developing and providing training courses for companies and tourism persons responsible. Their offer, for example, includes the two E-Learning trainings: **"Travel for Tomorrow Basic"** and **“Fit for future”**. They also offer various online based so called **knowledge modules** dealing with topics susch as “Tourism and Biodiversity”, “Sustainable customer journey”, “SDGs in tourism” or “Human Rights in tourism”.

The **"Quick-check Environment"** (Qucikcheck Umwelt) was developed by the certification agency **viabono**. As a specific instrument it determines operational environmental and climate indicators through an environmental check.

A special training module “Biodiversity and Tourism” developed by the **association of ecological tourism in Europe** (Ö.T.E. - Ökologischer Tourismus in Europa e.V.) offers an introduction to the topic of biodiversity and deepens it in the context of tourism. The practical guide to “**tourism and biological diversity**” was also developed by the ÖTE.

4.10.3.5 Financial Support for SMEs in regard to sustainable tourism activities

Funding in Germany can be applied for at all administrative levels (e.g. European Union, federal or state government, local authority). In addition, there are private funding providers, such as foundations, who also provide funds for a specific purpose. The individual tenders must always be checked first with regard to the scope, project partners to be involved (e.g. from other European member states, small and medium-sized enterprises (SMEs), set-up deadlines, maximum funding rates, etc.).

Well-Known platforms, such as the funding database of the Federal Ministry for Economic Affairs and Energy (BMWi) or the funding platform solely for the tourism industry of the Federal Tourism Competence Centre, can regularly be checked and reviewed in regard to suitable funding options. The databases give an overview of federal, state and European Union funding programmes. Using a search function, current funding offers can be researched - adapted to one's own specific needs.

Two funding programmes at federal level that could be of interest for tourism SMEs to apply for are described as follows:

The **climate protection campaign for SMEs** (*Klimaschutzoffensive für den Mittelstand*) by the KfW bank is granted to businesses that need funding for climate-friendly investments to improve the environmental performance of daily business. Although there is no direct link to tourism, tourism businesses can apply nevertheless as long as there is a focus on engaging in ecological and sustainable management (Bundesministerium für Wirtschaft und Klimaschutz, 2021a).

Another relevant funding programme that focuses on tourism SMEs is the funding programme **Performance improvement and Innovation Promotion in Tourism** (Leistungssteigerung & Innovationsförderung im Tourismus, LIFT). The programme was initiated in 2019 by the BMWi to finance and support innovative project ideas of SMEs in the tourism sector that function as role models. In total 1.5 million euros are invested to support SMEs of the tourism industry in developing projects and ideas regardless of topic or target group in the sector. In charge of the selection of businesses eligible for funding is the Federal Tourism Competence Centre that also supports the implementation processes by providing consultation (BMWi, 2019 December 09).

In addition to the national budget, all Federal States have their own tourism budgets to support specific tourism development programmes.

For instance, in the Federal State Thuringia offers grants for businesses of the economic sector, especially SMEs, with its programme **Gemeinschaftsaufgabe „Verbesserung der regionalen Wirtschaftsstruktur"** (GWR, engl. Common task "Improving regional structures of the economy"). Depending on the size of the business and the respective project, the GWR is generally funding 50% of the investment costs for action fields such as capacity-building, production process adaptations or environment protection. The GWR is further benefitting businesses that have been strongly affected by the corona pandemic, thus the GWR is especially addressing businesses of the tourism, accommodation and event sector.

Another programme is the **Special programme Circular Economy and Ressource Efficiency** (Sonderprogramm Kreislaufwirtschaft und Ressourceneffizienz) of the Federal State North Rhine-Westphalia. The programme funds projects regarding innovative investment in the field of circular economy and resource efficiency with up to 500,000 euros. Although tourism businesses can apply for the funding, there is no focus on sustainable tourism development.

Focusing on the tourism industry, however, are Federal State Saxony's programmes **Tourism Marketing and Destination Development**, funding mainly regional tourism associations, marketing businesses and DMOs, as well as the programme **Restart Tourism and Pilot Projects**, funding tourism SMEs, associations and municipalities at regional level. Both programmes focus on tourism development but do not emphasise sustainable development. In general, however, Saxony is heavily investing in a variety of funding programmes for SMEs, including programmes for coaching, innovative product development or environmental protection (Bundesministerium für Wirtschaft und Klimaschutz, 2021b).

4.10.4 Summary and conclusion on national situation

4.10.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

As already mentioned, most Federal states integrate the topic of sustainability into their federal policies in alignment with the German national sustainable development strategy. In the tourism sector, achievements like increasing sustainability certification and the establishment of competitions awarding sustainable engagement, especially accommodation providers and hospitality services as well as destinations, contribute more and more to sustainable tourism development. Additionally, campaigns and competitions like the Federal competition for sustainable tourism destinations in Germany are promoting not only destinations but also lighthouse projects of SMEs with exceptional sustainability commitment. A milestone for future transformation of the German tourism industry is the development of the Federal tourism strategy. As Germany sets a major focus on rural development, funding and support programmes for SMEs in rural areas are slowly increasing, affecting rural tourism structures. Due to the impacts of demographic change in Germany, among other reasons, another focus is barrier-free tourism. At national and regional level tourism service providers and businesses engage strongly in offering barrier-free tourism products. SMEs like hotels or tour operators play a crucial role here in transforming the industry. For instance, tourism marketing organisations have started to promote especially certified businesses and tourism products with the "Tourism for all" label. Finally, the innovative platform Tourism2030 and its ambitions as an international knowledge data base and networking tool for all tourism stakeholders should be mentioned. The portal's Green Travel Maps serve as a valuable instrument to display and promote sustainability-certified tourism businesses.

4.10.4.2 Challenges for the development of sustainable tourism and for SMEs

One of the major challenges for the development of sustainable tourism and for SMEs is the lack of funding programmes in Germany that focus either on sustainable development in the tourism industry or SMEs in tourism. Furthermore, not all Federal States have a tourism

strategy that focuses on sustainability, often related to the given natural or cultural assets. As some states still prioritize topics such as economic growth and branding this leads to less impetus or incentives for SMEs and other tourism stakeholders to transform themselves, engage in sustainable development or to participate in projects at national and regional level. Additionally, holistic transformation requires a network and collaboration of a variety of different tourism stakeholders to exchange and share information regarding sustainable tourism practices. Regardless if at international, national or regional level, the tourism industry needs effective communication instruments like online platforms and informative databases to be established and further developed.

Another major challenge for SMEs to engage in sustainable tourism development, however, is the lack of 1) guidance and training opportunities, 2) practical recommendations for action to integrate sustainability into the daily business and 3) exchange with best practices or role models of the industry that could give advice and inspiration on how to actually implement sustainable tourism practices.

4.10.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The catering and the tourism industry have been especially affected by the restrictions that resulted from the corona pandemic. According to DEHOGA, there has been a drop by 60 percent in the hotel and catering industry.

Therefore, the federal government and the BMWi decided on extensive measures to reduce the negative economic impacts by the COVID-19 pandemic. For instance, a temporary tax cut for meals in restaurants was established, excluding beverages (BMWi, 2021).

Furthermore, the corona interim financial aid, that has been extended till the end of 2020, supports SMEs in form of non-repayable grants for businesses that have been heavily impacted by the measures to slow down the pandemic. The aid benefits especially businesses in the tourism industry. For example, in the first aid period from June to August 2020, almost 30 percent of the requested funds were granted to the catering industry and about 10 percent to tourism businesses. According to the BMWi, all in all, the Federal Government spent about 6.8 billion euros in interim financial aid for the tourism and catering industry. In regard to the so-called November and December aid, the tourism industry received about 7.2 billion euros, which make up to about 57 percent of all disbursements (BMWi, 2021).

4.10.4.4 Recommendations for boosting Sustainable Tourism for SMEs

For boosting sustainable tourism, a stronger focus on educational programmes and projects that communicate the relevance of and necessity for sustainable tourism development but simultaneously offer consultation, practical guidance and respective certification for SMEs would be helpful. An active participation or rather collaboration with research and educational bodies is recommended. To reach SMEs these programmes and projects should be promoted and managed by the (local) DMOs and federal authorities alike. Furthermore, the federal government should engage in offering funding opportunities and creating benefits for SMEs and tourism stakeholders in general that contribute to the common SDGs and therefore Germany’s National Sustainable Development Strategy. Finally, collaborations and networking

at and between different levels in Germany and among a variety of tourism-related stakeholders should be fostered.

4.10.5 References

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4.11 Hungary

Gábor Bódis
(As of July 2021)

Hungarian tourism in general has come a long way since the change of regime, but in many areas it could not catch up with world trends, such as sustainability and its subareas. The Hungarian travelling population's lower discretionary income compared to other European countries and the developed world plays a role in this, which also affects the financial situation and profitability of domestic tourism service providers, but the level of future consciousness is likely to be lower than desirable for the domestic population environmental awareness. As long as the economic fundamentals of tourism are not strong enough on the demand and supply side, the need for social and environmental sustainability is also strongly questionable. Therefore, considering the "trinity" (economy-environment-society) of sustainability in the Hungarian tourism sector, the economic pillar is the most favourable one upon which social and environmental sustainability can be built.

After the adoption of the 2030 Agenda for Sustainable Development in September 2015, the implementation phase began at national, regional, and global levels, in which all countries have a crucial role, and their valuable support advance the world on a path to the sustainable future. To provide a more fine-tuned picture however, Hungary presented its Voluntary National Review at the UN High Level Political Forum on Sustainable Development for the first time in 2018. This review was an inventory exercise, providing a comprehensive overview of the different national policies, strategies, initiatives, and best practices, which further facilitates the achievement of the SDGs within and outside the country. Due to its location, natural potentials and cultural heritage, Hungary can offer favourable conditions for tourism. Its most important natural natural assets include the medicinal and thermal waters. The conditions are perfect for water, eco-, equestrian and bike tourism, and for the expansion of village and cultural tourism.

Hungary's ecotourism potential gives an opportunity to preserve the local values and provide the rural population with a livelihood and economic advantages. Health tourism is an exceptionally dynamically developing sector in Hungary; the health awareness of the population is gradually intensifying, and people are willing to spend more on their own health and that of their family. Active tourism activities in Hungary are typically used by domestic guests, but in the case of some products the proportion of foreign guests is decisive. Bike tourism or cycling itself has developed in Budapest and nationally in recent years. Cycling tourism in Hungary, in addition to transport, is one of the strong sectors of active tourism, with the cycling routes around the lake (Lake Balaton, Lake Fertő, Lake Tisza, Lake Velence) and the EuroVelo sections as central products. In addition to the development of cycle paths, the use of community cycle systems has also developed, but their popularity could be further enhanced by setting up a nationwide network. The use of public transport has spread rapidly in recent years. These modes of transport help to relieve other means of transport and also expand the choice for tourists. After the launch of MOL (Hungarian Oil and Gas Public Limited Company) Bubi (Budapest City Bike System) in Budapest in 2014, car-sharing companies

arrived in Hungary and by 2019 the community cars of three service providers were available. Shared scooters as well as electric scooters were introduced in 2019, further expanding the range of devices that can be used over short distances within the city.

4.11.1 Political framework for Sustainable Tourism

In line with the most relevant SDGs of the UN, the Hungarian parliament stated in 2017 (KSH, 2017), that by 2030, policies that contribute to sustainable tourism by creating jobs, supporting local culture and production must be developed and implemented. The main goal is to develop and apply tools to monitor the impact of sustainable development on tourism. The indicators are sustainable tourism strategies, policies and number of implemented action plans. In 2006, as part of the EU's new tourism policy, the Hungarian Parliament planned cross-financing of sustainable tourism projects through the European Regional Development Fund, which supported the development of cultural and natural heritage, accessibility and the infrastructure of mobility, measures to facilitate common cross-border tourism strategies and the exchange of experience between regions. In this passage the most important role players are described as they establish the political and professional governance pillars as well as the strategies influencing the daily activities of local and regional management organisations and SMEs.

In 2016 and 2017, there have been significant structural changes in the Hungarian tourism administration. Government responsibility for tourism was transferred from the Ministry for National Economy to the Ministry of National Development in April 2016. The national tourism administration and the traditional promotional tasks of the former Hungarian Tourism Ltd. were integrated into the newly established **Hungarian Tourism Agency** (*Magyar Turisztikai Ügynökség*) (MTÜ, 2016), operating under the supervision of the Prime Minister's Office at the moment. The **National Adaptation Strategy** *(Nemzeti Alkalmazkodási Stratégia)* in the second draft of the National Climate Change Strategy defines the domestic framework and possibilities for adaptation to climate change. According to it, “tourism is affected not only by direct climate parameters [heat waves, changing water flow, more frequent storms], but also by the natural effects of climate change [biodegradation, spread of invasive species] and their socio-economic consequences [spread of infectious diseases, energy and drinking water prices]. Climate-friendly tourism is consciously anticipating and preparing for the positive and negative effects of climate and weather change." (NAS, 2013)

In the sectoral regulatory environment, the two main directions of development have already emerged. One of them is whitening the sector. To achieve this, the **National Touristic Data Reporting Centre** *(Nemzeti Turisztikai Adatszolgáltató Központ - NTAK)* was launched. The digital platform operating under the supervision of the Hungarian Tourism Agency allows the anonymous, traffic statistics of all accommodation establishments in the country to be displayed in real time. Analyses are made from data received directly through accommodation management softwares to support data-driven decision-making in the tourism industry (NTAK, 2020). It has a significant role in the whitening of the tourism sector, as the territorially competent local governments and the National Tax Office also have an insight into the data sets that are relevant to them. The government wishes to reduce taxes in the sector in the

future. The other concept in the political framework is the reduction of bureaucracy. To give a more detailed institutional overview about the political framework for sustainable tourism, the picture seems to be complex and overlapping as a number of ministries, officies and councils have a dedicated scope to some extent to regulate or influence it.

A short description about them is provided in the key stakeholders' chapter. (Kormany 2021)

4.11.1.1 National Sustainable Tourism Policies and Strategies

The Hungarian Tourism Agency is a state-owned national tourism marketing organisation. The aim of its activities is to increase the demand for Hungarian tourism by promoting inbound and domestic travels in order to enhance the development of the tourism industry, also in a sustainable way. The **National Tourism Development Strategy 2030** (*Nemzeti Turizmusfejlesztési Stratégia 2030*) is a core document defining the system of targets and methods for the Hungarian state's tourism management efforts up to 2030. It was published by the Hungarian Tourism Agency in 2017. The purpose of the document is to define the state's short-, medium- and long-term tasks for the sector by identifying key intervention points and listing strategic goals as well as to allocate the strategic tools, resources and institutional framework necessary to reach the set targets. A new approach of attraction development and basic infrastructure development is to supplement the destination-based approach and shall guarantee the economic, social and ecological sustainability of the developed attractions as well as ensure that visitors can enjoy high-quality experiences. (NTS 2030, 2016)

A **COVID-19 handbook for the Tourism Sector in Hungary** (*Magyar Turisztikai Ügynökség COVID-kézikönyv - MTÜ*) was compiled to assist the work of accommodation establishments, catering businesses, tourism attractions, and service providers with significant guest turnover in connection with the reopening, based on aspects considered important for this transition. The COVID manual summarizes the key information about the coronavirus and outlines the key steps to reopen hotels, restaurants, and other service providers. It is adapted to the current situation, thus helping tourism operators. The most important changes in pandemic regulations are updated on a regular basis. (Covid19, 2021)

The NTS 2030's version updated in 2021, now called **Tourism 2.0** (*Turizmus 2.0*), will serve as a benchmark for all sectoral actors and developments in the next 10 years. It defines the framework of the next period in which the state and the market will think together about the future of Hungary's tourism. The quantifiable strategic goal is to increase the direct and indirect contribution of Hungarian tourism to the GDP from the current 13 to 16 percent by 2030, the number of tourists to reach 20 million per year, and the number of guest nights to be 50 million. The three years that have passed since the publication of the original document and the effects of the COVID-19 epidemic in 2020 and 2021 have fundamentally changed the operating conditions of the sector and the competitive situation in Hungary. Accordingly, the Tourism 2.0 continues to build on the basic approach of the NTS 2030. The large-scale tourism developments of recent years provide a solid basis for further attraction developments and constructions and the strengthening of Hungary's position. (Turizmus 2.0, 2021)

The strategy was prepared in line with the territorial and policy objectives of the current **National Development 2030 - National Development and Territorial Development Concept** (OFTK, 2014). Thanks to the naming of tourist areas and the destination approach, territorial aspects are also prominent providing a framework for specific regional branding by defining the profile of areas. The key directions set out in the document are strong digitalisation, further whitening (e.g. invoicing) of the tourism sector, the completion of data-driven sector governance, the implementation of consumer marketing and focused sales as well as the development of tourism training and education. This also includes the radically new economic and social processes and sectoral environment response caused by the COVID crisis.

Sustainability is a strategic goal. In addition to sustainability-focused developments, industry players can participate by obtaining centrally certified sectoral brands. In this context, SMEs play an important role as locally crafted raw materials are used, local people are hired, and they have to comply with the standards that are easier to understand for the visitors. The strategy is structured along 12 directions, which are used to meet the needs and shortcomings identified in the situation analysis, as well as from the directions prioritized and indicated by the NTS2030. Direction 10 is broad-based sustainability. The long-term goal here is to achieve a balance between the competitive development of destinations and the protection of the environment and the interests of local communities. Sustainability considerations should be reflected in destination-level product development. This will be facilitated by the introduction of a sustainability label called *Collaborative Ecosystem* will be widely applicable in the tourism sub-sectors. The goal is for the actors in the sector, businesses, employees, professionals and management organizations and, last but not least, the population of destinations to live together sustainably as a collaborative ecosystem. As a new concept, it is possible to apply for the CheckINN Green Award, the initiative established by the Hungarian Tourism Agency to support socially and environmentally responsible tourism businesses and organizations in the SME sector. Although COVID-19 has shaken the tourism industry, sustainability and social responsibility aspects have now come even more in focus. The future must be kept in mind, so the Award is looking for the best ideas, developments and services to boost 'green' tourism and to support bottom-up initiatives.

National Development 2030 - National Development and Territorial Development Concept (*Nemzeti Fejlesztés 2030 – Országos Fejlesztési és Területfejlesztési Koncepció*). Starting out from the social, economic and sectoral and territorial development needs of the country, it defines a long-term vision as well as development policy objectives and principles. The trade and services sector has become the leader in Hungary in terms of the number of employees and value-creation. The sector makes up two thirds of the employed and the same proportion of added value. In the past period, a remarkable concentration took place in several areas (e.g. Party Zone of Budapest with the ruin pubs) within the sector. (OFTK, 2014)

National Climate Change Strategy (*Nemzeti Éghajlat-változási Stratégia*). The Strategy includes an assessment of the expected impacts of climate change in Hungary, the natural and socio-economic consequences, as well as the climate vulnerability of ecosystems and sectors, targets, priorities, and directions for action to reduce greenhouse gas emissions by 2050. It proposes the following courses of action:

- Development of a climate-friendly tourism development strategy
- Strengthening of attitudes by education, promotion of domestic tourism and leisure activities
- Development of related infrastructure (educational trails, running tracks, tourist routes)
- Development of a climate-friendly tourist brands
- Reduction of energy consumption of events with tourist attractions

In reference to the SMEs specifically, this strategy lists the following actions to be taken: 'Reducing material and energy consumption with increasing efficiency, making the company's operations climate-friendly, greening products and services, carrying out climate-friendly research and development, and being socially responsible.' (NÉS, 2018)

The Climate and Environmental Protection Action Plan (*Klíma- és Természetvédelmi Akcióterv*) was announced on 16 January 2020 by the prime minister. It proposes eight action points including waste management, environmentally friendly technologies for companies, renewable and carbon-neutral energy production, energy efficiency, reforestation in relation to new-born babies (10 trees for every new-born baby), wider availability and use of affordable electric cars, the launch of the green bus programme as well as the introduction of green government bonds. (KTA, 2020)

The National Nature Conservation Master Plan (*Nemzeti Természetvédelmi Alapterv*) from 2015 to 2020 (as part of the National Environmental Programme) states the importance of biodiversity and ecosystem services and imposes a multisectoral approach to prevent further loss of biodiversity. The main objective is to maintain or extend the nationwide network of protected areas in order to provide the conditions for regional protection of Hungarian landscape features and natural values. The quality improvement of ecotourism facilities and services in nature conservation areas is a chapter in the document. (NTA, 2015)

National Landscape Strategy (*Nemzeti Tájstratégia 2017—2026 - NLS*). Pursuant to the definitions of Government Decree from 2012 on strategic management by the government, the NLS is being developed in compliance with the criteria of policy strategies. However, its fundamental purpose and mission resulting from the European Landscape Convention is to develop a horizontal vision which goes beyond the given policy areas and to elaborate a medium-term strategy to achieve its vision. It provides a complex holistic vision in the use of the landscape, with some reference to tourism. Many conventions protect certain elements of the landscape, but the European Landscape Convention is what protects European landscapes without any sort of sorting or filtering. (NTS, 2017)

Rural Development Programme (*Magyar Falu Program*). In the New Hungary Rural Development Plan 2009—2014, the main task was to increase the population retention and employment power of the countryside. Within 21 agro-environmental schemes nearly 15,000 farmers were financially supported on 1.2 million hectares. The total area under special nature protection aimed by zonal High Nature Value agro-environmental schemes was more than 200,000 hectares. The recent tenders in the programme will help to improve access to local

public services and help social inclusion, thus reducing territorial inequalities that visitors experience in rural tourism reception areas. (MFP, 2018)

National Forest Strategy 2016—2030 (*Nemzeti Erdőstratégia*) The forest must be utilized in such a way that the farming opportunities are maintained for the future, while preserving its biodiversity, proximity to nature, productivity, viability, and meeting social needs. (NES, 2016)

National Transport Infrastructure Development Strategy 2014—2050 (*Nemzeti Közlekedési Infrastruktúra-fejlesztési Stratégia*). The basic goal is to increase the competitiveness of Hungary to the greatest extent possible by efficiently serving economic processes. (NKIS, 2014)

Healthy Hungary 2021—2027 (*Egészséges Magyarország Stratégia*). Its overall goal, based on the current state of the field, is to create a national-scale professional and social action programme, using international and domestic experience that will significantly reduce cancer mortality by at least 10% by 2030, despite an increasing incidence. (EMS, 2021)

4.11.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

Destination Management Organisations - DMOs (*Desztináció Menedzsment Szervezetek, DMSZ*)*:* The Hungarian Tourism Agency started to set up a new destination management network to properly link the central and local levels. In the newly developed model, the tasks will be managed in a unified manner and the cooperation of local interest groups will be supported in order to achieve a common destination vision. The aim for DMOs, as a key player in the tourism ecosystem, is to ensure effective communication between the local and central levels and within the destination as well as to promote a destination-based product development approach and successful market entry. (DMSZ, 2022)

Danube River Basin District Management Plan (*A Duna vízgyűjtő területének gazdálkodási terve*): Both the 2009 and 2015 Danube River Basin Management Plans focus on four significant water management issues that can affect the status and quality of surface waters like rivers, lakes, transitional and coastal water bodies and transboundary groundwater bodies. Based on the detailed picture we have of the Danube Basin now, the plan outlines visions for each issue to achieve an improved and sustainable water environment for water-based tourism products as well. (DVTGT, 2010)

Visegrad Fund (*Visegrádi Alap*): Their vision is that grants, scholarships and residencies will become the catalyst for the advancement of innovative ideas in Central and Eastern Europe. The strategic priorities are announced annually by the V4 (Czech Republic, Hungary, Poland and Slovakia) country holding the rotating presidency within the group. These are:

- Returning to the roots of the Visegrad cooperation
- Post-COVID recovery (projects focusing on supporting the V4's resilience/recovery in terms of health, economy and society, through innovative solutions)
- Promoting regional branding and tourism (projects focusing on promoting the V4's external image and tourism to and within the V4 region) (VA, 2022)

Hungary has ten national parks which cover approximately 10 percent of the country's territory. The parks are managed by the National Parks of Hungary government agency. The main tasks of the **Nature Conservation Service** (*Természetvédelmi Őrszolgálat*) is, besides damage prevention, to protect and preserve about 850 thousand hectares of protected natural areas of national importance, more than 1.2 million hectares of Natura 2000 areas outside protected natural areas as well as about 1,900 protected plant and animal species. (TÖSZ, 2022)

Budapest Brand (*Budapest Brand Nonprofit Zrt.*). It is Budapest's official organisation for tourism, culture and marketing activities. It is to develop the city's brand and tourism strategy, and is also responsible for creating content, along with organising cultural festivals. They convey a liveable and lovable city image to Budapest-dwellers and visitors as well. The new 48-hour Restart Budapest card, which offers free transport and access to the spas, is the most suitable tool for rediscovering the capital, and generating a higher demand for the SMEs. (BB, 2021)

LEADER programmes in 2014—2020 (*LEADER programok*)**.** These are Local Action Groups (co-financed by the European Agricultural Fund for Rural Development in the framework of the LEADER) that were supported to carry out local development strategies. (LEADER, 2014)

4.11.2 Key stakeholders

To provide a comprehensive map about the key stakeholders in Hungary, first the governmental and semi-governmental ones are listed. Within this group, first of all those organisations are taken into account which have a wider scope than sustainable tourism and the small and medium sized enterprises, but they are linked to tourism concepts, strategies and their implementations in direct, indirect or induced ways. Secondly, the ones that are defined within the tourism sector are mentioned.

4.11.2.1 Governmental and semi-governmental bodies

- **Directorate for Environmental Sustainability** (*Környezeti Fenntarthatóság Igazgatósága*)
- **National Council for Sustainable Development** (*Nemzeti Fenntartható Fejlődési Tanács*)
- **Ombudsman for Future Generations** (*A jövő nemzedékek érdekeinek védelmét ellátó biztoshelyettes*)
- **Hungarian Central Statistical Office** (*Központi Statisztikai Hivatal*)
- **Hungarian Business Council for Sustainable Development** (*Magyarországi Üzleti Tanács a Fenntartható Fejlődésért*)
- **Roundtable of Hungarian Civil Society Organisations for the Sustainable Development** (*Civil Kerekasztal a Fenntartható Fejlődési Célokért*)
- **Ministry of Agriculture** (*Agrárminisztérium*)
- **Ministry of Innovation and Technology** (*Innovációs és Technológiai Minisztérium*)
- **Ministry of Human Resources** (*Emberi Erőforrások Minisztériuma*)
- **Hungarian youth delegates** (*Magyar Ifjúsági Küldöttek*)

- **Hungarian Tourism Agency** (*Magyar Turisztikai Ügynökség*)
- **Ministry of Foreign Affairs and Trade** (*Külügyi és Külgazdasági Minisztérium*)
- **Centre for Development of Active and Ecotourism** (*Aktív- és Ökoturisztikai Fejlesztési Központ Nonprofit Korlátolt Felelősségű Társaság*)
- **National Park Directorate** (*Magyar Nemzeti Parkok Igazgatósága*)
- **Kisfaludy 2030 Tourism Development Company** (*Kisfaludy2030 Turisztikai Fejlesztő Nonprofit Zrt*)
- **National Forestry Association** (*Országos Erdészeti Egyesület*)
- **Hungarian Nature Park Association** (*Magyar Natúrpark Szövetség*)

4.11.2.2 Tourism Associations

- **Association of Tourism Developers and Consultants** (*Turizmusfejlesztők és Tanácsadók Szövetsége*)
- **Lake Balaton Development Council** (*Balaton Fejlesztési Tanács*)
- **Balaton Association** (*Balatoni Szövetség*)
- **Hungarian Bocuse d'Or Academy** (*Magyar Bocuse d'Or Akadémia*)
- **National Federation of Rural Tourism** (*Falusi és Agroturizmus Országos Szövetsége*)
- **Hungarian Hiking Association** (*Magyar Természetjáró Szövetség*)
- **Hungarian Tourism Programme Foundation** (*Magyar Turisztikai Program Alapítvány*)
- **Hungarian Tourism Association** (*Magyar Turisztikai Szövetség Alapítvány*)
- **Hungarian Cycling Federation** (*Magyar Kerékpáros Szövetség*)
- **Hungarian Baths Association** (*Magyar Fürdőszövetség*)

Destination Management Organizations (*Turisztikai Desztináció Menedzsment Szervezetek, DMOs*) are responsible for the management of settlement-level value propositions. Their operation is largely decentralized and does not follow a set standard, so they have varying efficiencies in general. DMOs finance the costs of their operation through membership fees. Thus, the central destination development and management goals of the government, represented by the Hungarian Tourism Agency and the strategy entitled NTS Tourism 2.0 mentioned before are not met. To bridge this unusual situation, the Agency initiated the new system of Regional DMOs.

Regional DMOs (*Regionális TDM-ek*)**.** The central destination management tasks will be performed by the Agency and its subsidiaries at regional level in the future. These regional sub-organizations will be responsible for strategic development, tourism product development and management, communication campaigns, and coordination of specific tourism developments.

Tourinform Offices (*Tourinform Irodák*). Tourinform offices are representatives of the local level. They are basically in charge of providing local information and support local sales. Occasionally the scope of a local DMO is merged with the one of the Tourinform office, in which case the DMO focuses on working with corporate partners.

4.11.2.3 NGOs, Sustainable Tourism Networks and Partnerships

These organisations are technically out in the field with their professional, and in many terms, with their direct visitor touchpoints. Attractions, such as zoological gardens, wine cellars and their adjoining restaurants, local government tourism referees, green tourism associations with their programme portfolios, as well as small-scale business intermediaries or agencies make the above lists more fine-tuned as they have strong partnerships with the ventures, family businesses, and their goal is to introduce or maintain sustainable tourism service practices.

- **Association of Hungarian Zoos** (*Magyar Állatkertek Szövetsége*)
- **Westpannon Team** (*Nyugat-Pannon Terület- és Gazdaságfejlesztési Szolgáltató Közhasznú NKft.*) regional economic developmental agency in Western Hungary
- **Balaton Circle** (*Balatoni Kör*) association of local wineries and fine-dining restaurants around the Lake Balaton
- **Hungary NEXT** (*Hungary NEXT ország-márka-műhely*) country branding pool of experts in tourism management as well as in the creative industry
- **Village Development Academy** (*Falufejlesztő Akadémia / Faluakadémia*)
- **Nimfea Nature Environment and Nature Conservation Association** (*Nimfea Természetvédelmi Egyesület*)
- **Southern Transdanubia Ecotourism Cluster** (*Dél-Dunántúli Ökoturisztikai Klaszter*)
- **Hungarian Geocaching Association** (*Magyar Geocaching Közhasznú Egyesület*)
- **Palkonya Tourist Association** (*Palkonya Turisztikai Egyesület*)

As a new and international network or partnership, Visegrad for Sustainability or **Visegrad for Sustainable Development Goals - V4SDG** (*Visegrád a Fenntarthatóságért*) was created to become the organisation that paves the way towards the achievement of the SDGs in Central Eastern Europe. (V4SDG, 2019)

4.11.2.4 Relevant Research and Educational Bodies

Tourism research has got a notable past in Hungary. However, a major transition has been carried out recently as the government defined new owners, mostly foundations to direct and operate the research and education centres. The best-known universities have tourism and catering faculties, mostly within either the economics or the marketing studies and departments. The **Tourism Training and Research Centre**, which is operated by the Corvinus University of Budapest and partially financed by the Hungarian Tourism Agency developed its curriculum and educational methodologies for sustainable and future-conscious tourism education in the most visible and successful way.

- **Hungarian Tourism Academy** (*Magyar Turizmus Akadémia*)
- **iASK** (*Felsőbbfokú Tanulmányok Intézete*) institute for higher education
- **Budapest Metropolitan University** (*Budapesti Metropolitan Egyetem*)
- **Corvinus University of Budapest** (*Budapesti Corvinus Egyetem*)
- **Budapest Business School** (*Budapesti Gazdasági Egyetem*)
- **Edutus University** (*Edutus Egyetem*)

- **Kodolányi János University** (*Kodolányi János Egyetem*)
- **Dennis Gábor Collage** (*Gábor Dénes Főiskola*)
- **Pannon University Veszprém** (*Pannon Egyetem Veszprém*)
- **University of Pécs** (*Pécsi Tudományegyetem*)
- **University of Sopron** (*Soproni Egyetem*)
- **Tourism Training and Research Centre** (*Turizmus Továbbképző és Kutatóközpont*)
- **Responsible Tourism Research Institute** (*Felelősségteljes Turizmus Kutató Intézet*)
- **TIC Tourism Intelligence Centre** (*Turizmus Intelligencia Központ*)

4.11.2.5 Individual Tourism Businesses and Destinations of Particular Relevance

In many places, even in the case of attractions operated by small businesses, it can be seen that sustainability is included in their concepts, in their business practices, at some level or at least partially. This strict and limited selection specifically lists those service providers who are carrying out both their mission and their day-to-day work for green tourism with outstanding success. They prefer sustainable accesses such as bicycle routes and vehicles, paddle or rowing boats, or narrow-gauge trains linking the attractions together creating seamless value chains and experiences for their guests. Although they are very popular and thanks to some European Union funds to develop these attractions, Hungary needs some longer time to come up with these types of services in the future.

- **Ladybird Farm Leisure Centre** (*Katica Tanya*) rural tourism and entertainment place
- **Forest House Ecotourism Centre** (*Erdő Háza Ökoturisztikai Látogatóközpont*) visitor centre
- **Swimming Village on Tisza Lake** (*Úszófalu a Tisza-tavon*)
- **Ság Mountain Geological Study Trail** (*Ság-hegyi Geológiai Tanösvény*)
- **Novohrad—Nograd Geopark** (*Novográd Geopark*)
- **Dámpont** (*Dámpont*) visitor information centre
- **Kerkaland** (*Kerkaland*) forested area with many facilities and attractions for green tourists

4.11.3 Activities and instruments for the development of sustainable tourism

These programmes are perhaps the most successful ones in Hungary. This is due to the fact that they do not only directly help the regions and municipalities where the actual projects are implemented, but also, in many cases, due to the lack of local expertise and knowledge, they involve small businesses in planning and implementation without using local human resources necessarily. Thus, it is true that the programmes are more extensive and mean more administration, yet are able to involve a wider range of SMEs.

4.11.3.1 Sustainable Tourism Initiatives, Projects and Campaigns

Currently, the government makes considerable efforts in encouraging domestic tourism. Development should be speeded up in some regions. For instance, a lot of effort is made to develop the most popular Hungarian tourism destinations by government loans available on favourable terms and non-refundable grants. The below-listed Economic Development and

Innovation Operational Programmes (GINOP) as well as Regional and Settlement Development Operational Programmes (TOP) are the most important ones:

- **GINOP-1.3.5-15-2015-00001:** Tourism Innovation Marketing Cooperation Fund (TIMEA)
- **GINOP-7.1.2-15:** Four seasonal hikes from Sopron to Sárospatak
- **GINOP-7.1.6-16:** Development of World Heritage Sites
- **GINOP-7.1.8-18-2018-00001:** Development of the qualification system of tourist attractions
- **GINOP-7.1.9-17:** Integrated product and service development in tourist-frequented areas
- **GINOP-1.3.4-17 and VEKOP-1.3.2-17:** Positioning of tourism development areas
- **VEKOP 1.3.2 and 4.1:** Tourism development areas position; Development of the infrastructure of active tourism networks; Development of thematic networks
- **GINOP-1.3.4-17 and GINOP-7.1.8-18:** National tourism marketing and demand incentive programme; National Castle and Castle programme tourism developments; Development of infrastructure of active tourism networks; Complex tourism development of spas; Church cultural heritage tourism development; Complex tourism development of national parks
- **TOP 1.2.1 and 6.1.4:** Socially and environmentally sustainable tourism development programme

The Kisfaludy Tourism Development Programme (*Kisfaludy Program*) manages the largest Hungarian tourism development programme aimed at making Hungary the tourist centre of Central Europe by 2030. Kisfaludy Hotel Development Construction launched as the flagship of the Programme in 2017. Development categories of the programme include accommodation, hospitality, attraction operation, programme organization, tourism infrastructure operation as well as other areas. (KP, 2022)

Interreg Danube Transnational Programme (DTP) *Danubian Green Belt* project. The main objective was to contribute to the implementation of the EU Danube Strategy by further development of the Green Belt as spine of EU Green infrastructure in order to maintain and enhance ecosystems and their services in the Danube Region by 2020. The main aim of the project was to foster the restoration and management of ecological corridors through the Transboundary Management Programme for River-Dynamic Corridor Development to ensure harmonised management practices and well-functioning cooperation among the various management authorities. (DTP, 2022)

In the past few years party tourism has increased in Budapest. Some parts of the city have become party quarters and their visitors, neither being primarily not well-off young Hungarians and foreigners, nor behaving as it would be preferred by the locals. This type of party tourism generates important revenues only for a limited number of pub owners but the external costs, for example caused by pollution, are shifted to and very often covered by the municipalities, i.e. the inhabitants of the area.

This is a major marketing task, which means design of the information, design of the alternative visitor experience routes and desig the capacities, initiated by the former **Night Ambassador of Budapest** (*NEO Budapest*) and a civilian community called **Hungary NEXT** (*Hungary NEXT ország-márka-műhely*). Now, the idea is to create a cultural hub in this part of the city with the involvement of the locals and the local businesses. A new consideration is to build this quarter on the basis of the Jewish heritage which was an outstanding feature of the area before the appearance of the ruin pub era. (NEO, 2018 and NEXT, 2002)

The **Budapest Restart Programme** (*Budapest Újraindulási Programja*) rethinks the use of urban spaces. It aims to make walking, cycling and public transport more attractive, to revitalize the economy, to relaunch cultural life and tourism, to develop the social welfare system, and to support NGOs.

DanubeParks is an international network of protected areas along the Danube, currently comprising 20 areas represented by different institutions (public authorities, public enterprises, NGOs). The network cooperates in different fields of work that are important to all partners and where solutions depend on a transnationally coherent strategy. Some Hungarian territorial development agencies and tourism development companies are invited to cooperate to create sustainable Transdanubian Travel Stories as well as Visitor Experience Packages based on sustainable transportation modes along the river. (DP, 2020)

INSiGHTS (*INtegrated Slow, Green and Healthy Tourism Strategies*): To find solutions on how to make regions more attractive to tourists 13 partners from Austria, Bulgaria, Croatia, Germany, Hungary, Romania, Serbia, Slovakia, and Slovenia have joined forces in the INSiGHTS project co-financed by the European Regional Development Fund and the Instrument for Pre-Accession Assistance. Partners will be working in close cooperation with stakeholders in eight regions to gain relevant local feedback on the current situation of tourism and also ideas and proposals for new opportunities for slow, green and healthy tourism. (INSIGHTS, 2020)

Hungary NEXT (*Hungary NEXT ország-márka-műhely*):The well-grounded motivation and organising power of the new-generation tourism marketing workshop is the concept of discussion. They believe that most of the problems - which seem to be unsolvable - are generated by the lack of discussion in the tourism sector in Hungary. They wish to change it by bringing in the culture of negotiations based on values, identities and promisies of the destinations in Hungary. They initiated two campaigns during the lockdown with the hashtags #*vanjövőnk* ("We have got the future") and #*felelősen* ("Plan your trip responsibly"). (NEXT, 2020-2021).

- **Palkonya Gastrovillage** (*Palkonya Gasztrofalu*)
- **Greenways Methodological Association** (*Zöldutak Módszertani Egyesület, ZöME*)

4.11.3.2 Marketing and Information Services Supporting Sustainability in Tourism

The market appearance of the Hungarian ecotourism programme offer is not efficient enough, yet. Ecotourism service providers do not have communication or marketing staff members whose tasks would be to establish communication channels and marketing strategies. In order to meet the needs of tourists - since ecotourists come with motivations that are partly

different from those of other tourists - their attention must be directed to the topic of environmental awareness by means of environmental education. Important points of the management systems are visitor centres, reception gates and reception areas, information points, demonstration places, where guests can directly receive information about protected natural areas. These main reception points would require the development of a unified image, which is currently implemented in a few places. Mutual co-operation is obviously important here as well, as ecotourists expect service providers to provide information to them. Thus, there is a natural need on the part of the surrounding service providers to provide guests with full information at these points. The creation of a unified image cannot be bypassed; the emphasis on natural values and characteristics that can be clearly identified for tourists should be promoted. Positioning and differentiation are important tools for this.

As for the information services, or even more the news services in the field of tourism, the daily updated portals report on sustainable tourism developments, they are only able to induce them at most by organizing conferences on such topics within their own possibilities. The most outstanding work is carried out by the **Brand Monitor Magazine** (*Márkamonitor*), which, unlike the others, has a non-tourist profile in general, but provides separate sections for tourism and the companies working in it during the events they organise or the print magazines they publish. The magazines listed here are available not only for the professionals but also for the laics. (Márkamonitor, 2022)

- **Tourist Magazine** (*Turista Magazin*) designed for travellers maily
- **Tourism Bulletin** (*Turizmus Bulletin*) academic journal for professionals and scientists
- **Greendex Online Magazine** online magazine both for travellers and professionals
- **KÖVET Association** (*KÖVET Egyesület*) print and online periodical for SMEs
- **Turizmus.com** daily tourism news portal for the public as well as for professionals
- **Turizmus Online** daily tourism news portal for the public as well as for professionals

The global telecommunication company Telekom via its online platforms called **Telekom Hello Biznisz** in cooperation with the civilian **Hungary NEXT** has started up a four months long campaign designed for SMEs in Tourism to provide best-practices focusing on innovation, technology, digitalisation, sustainability and competiveness in the post- or long-COVID era. The campaign named *Figure It Out*, introduces individuals, ideas as well as branding solutions. (FIO, 2021)

There are podcasts of the CEO of the state-owned Hungarian Tourism Agency, in which he talks about the latest and most important news, measures and statistics concerning tourism. Another podcast focusing more on sustainable tourism is broadcasted by **Good-Deal** led by Mr. Balázs Kovács, one of the best-known Hungarian tourism experts. For almost a decade he used to be the official representative of the Hungarian Tourism Office in Vienna. (GD, 2022)

4.11.3.3 Tourism Sustainability certification Systems and Awards

As CheckINN Green Award has already been discussed in a previous chapter (CheckInn, 2020), only the other one, which is directly offered to SMEs is described here. It is the **For a Sustainable Future Award** to recognize the outstanding corporate and leadership

performances contributing to the SDG's and mitigating the effects of the pandemic. The purpose is to recognize the extraordinary achievements of leaders and companies on advancing Sustainable Development Goals (SDG-s), and this time the outstanding actions of the pandemic were also integrated. They would like to inspire companies and their leaders to integrate sustainability factors into their business decisions, and to create solutions which go beyond business as usual, and which can be rolled out to other business operators so we can make a real impact. The current situation has highlighted the importance of sustainable operations to make companies resilient. There are four categories: Business solutions, Business model changes; Change leaders, for leaders leading by example and showing accountability; Social responsibility programmes; and Leading Women. (BCSDH, 2021)

- **Tourism Specialist of the Year Award** (*Az Év Turisztikai Szakembere Díj*) given to professionals
- **City Marketing Award** (*Városmarketing Díj*) given to cities and municipalities
- **CheckInn GREEN Competition** (*Felelős Turizmusért Pályázat*) responsible tourism award to SMEs
- **Floral Hungary Contest and Award** (*Virágos Magyarország verseny*) given to cities and villages
- **Art is Business Cultural Tourism Award** (*Art is Business Kulturális Turizmus Díj*) given to cities
- **For a Sustainable Future Award** (*Fenntartható Jövőért Díj*) given to SMEs and managers

4.11.3.4 Capacity Building for Sustainable Tourism

The important contribution of tourism to the world economy during recent decades is widely recognised by Hungary. Indeed, international tourism has been growing at a slightly faster pace than the world economy and this seems likely to continue in the long-term, despite the current pandemic recession. But in order to provide employment as well as social development, tourism in Hungary needs some more specific and easy-to-understand policies, which enable a city, a region or a country to be competitive in the global tourism, travel and leisure market. In order to achieve a sustainable tourism sector, there are a range of issues where policy makers and practitioners need to engage. Such issues include the innovative use and development of human capital, new forms of organisation and management, new approaches to for-profit and social entrepreneurship, community capacity building and community involvement, and new developments of intangible assets based on reputation, image-building, marketing and communication. The to-do-list of the government is long. But the evidence shows that they are taking action on a number of fronts central to the success of the tourism industry. Hungary has stepped on the right path to achieve all of these goals, however, the economic mindset is still stronger than the future-conscious one, especially in the SME sector. One of the most demanded educational programme, which is tailored to SME owners as well as tourism managers already being in a decision maker position, is the **Tourism Development Manager** (*Turisztikai Fejlesztési Menedzser*) educational programme at the Corvinus University of Budapest (TFM, 2020). The focal point in the portfolio of the subjects

offered is on green tourism and sustainable destination management. The first semester's tuition fee is paid by the Hungarian Tourism Agency. (Uni Corvninus 2021)

4.11.3.5 Financial Support for SMEs in Regard to Sustainable Tourism Activities

Enterprise Development and Innovation Operational Programme - VINOP (*Vállalkozásfejlesztési és Innovációs Operatív Program*): As in the former GINOP (described earlier) covered calls for business capacity building and competitiveness, now the same structure continues in the VINOP programme. The specific new tender is to help micro, small and medium-sized enterprises adapt to modern business and production challenges. VINOP provides funding for the following areas: Business development, Development of key strategic sectors, Research, development, innovation (RDI), Digitization, Tourism, Heritage protection, Professional training, Higher education, Adult education, and Employment. (VINOP, 2020)

Within the freshly launched **Hungarian Village Business Restart Programme** (*Magyar Falu vállalkozás-újraindítási Program*)*,* applicants can be sole proprietorships and SMEs. Supported fields are equipment acquisition, real estate construction, IT, site development and energy management. Non-refundable support of 2—10 million Hungarian Forints can be won with an intensity of 70% coverage. (MFVP, 2021)

4.11.4 Summary and Conclusions

The biggest challenge is the fragmentation of the profession and the resilience of its advocacy power. Although some NGOs or knowledge centres make suggestions, there is no real and deep cooperation with government agencies. In many cases, the distribution and availability of funding is unbalanced and focuses on spotted or regional developments rather than incubating less exploited and developed destinations and their businesses. Thus, cooperation would be the first step.

On the other hand, enhanced co-operation and further development of the sector could lead to an increased demand for tourism which will require a sustainable response from the partners involved. Much can be learned from an international exchange on the tourism sector around themes such as the rationale behind the development of comprehensive policy frameworks, innovative mechanisms for skills development, tourism quality and sustainability, how the pitfalls and barriers encountered have been addressed, and how communities can contribute to attracting and sustaining tourism.

Recommendations for the Hungarian policy makers involving the local SMEs would be, first of all, to develop integrated strategies based on sustainable tourism in a reflective manner with local characteristics and local needs. Today, the most important frames are decided by the government, and bottom-up suggestions hardly ever get integrated into strategies. The capacity building as well as the education should focus more on how to build on local strengths to valorise a locality and how to engage local communities in this process. New mechanisms should be developed in order to ensure vertical and horizontal co-operation among all stakeholders.

Small entrepreneurs and managers of small settlements do have a number of trainings and education is available to them, which, however, are less location-specific and too general. The utilization of natural and human resources in order to maximize profits must not remain a priority. Investment-based tourism management and marketing must be tuned into a system that also takes into account other measurement tools, where the satisfaction of locals and local entrepreneurs is also shown.

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4.12 Italy

Cinzia De Marzo, Saverio Primavera and Paola Zuccolo
(As of December 2021)

Prelimary considerations



Figure 12: Map of Italy and its regions

The world can and must harness the power of tourism and is important to follow the guidelines of the **2030 Agenda for Sustainable Development** 1"and its 17 Goals to determine together the exact role that tourism can play in the sustainable development agenda and beyond 2030, also in line with the **EU Green Deal** towards climate neutrality by 2050 and particularly with the EU policy framework on tourism, such as the Commission communication '*Tourism and transport in 2020 and beyond*'.[15]

Due to the pandemic COVID 19 crisis, it is becoming crucial to re-start tourism with a qualified approach, establishing new balances between safety, health, climate change impacts, environmental protection, and sustainable tourism at destination level.

4.12.1 Political framework for Sustainable Tourism

Since 2001, according to a new constitutional law, some of national exclusive competences on different matters, including **tourism**, has been transferred at **regional level** (TITLE V of the Italian Republic Constitution, articles 117-118), establishing a different division of responsibilities between central State and other administrations (regions, local authorities,

[15] COM (2020) 550 final

autonomous bodies, provinces, and municipalities). Therefore, the Italian Regions have the right to play a primary role in a whole series of fundamental tourist areas, including:

- planning and development of tourism activities at the level regional and local;
- promotion of strategic marketing activities;
- management of the European Structural Funds;
- management of activities related to tourist facilities regional;
- management of activities related to companies and professionals of the tourism sector

In article 6 of the **instituting decree law no. 22/2021** the identity and mission of the **new Ministry of Tourism** is defined: It elaborates the national tourism policies, within the competence of the State, and takes care of their planning, coordination and promotion, and tourism development projects, in relationship with the Regions and local Bodies, in collaboration with the Ministry of Foreign Affairs and International Cooperation (MAECI), with European Institutions and with supranational Bodies, as well as with trade associations and companies.

4.12.1.1 National Sustainable Tourism Policies and Strategies

The **Italian Strategic National Plan for tourism 2017-2022** named '*Italy, the Country of travelers'*, highlights the principles of sustainability, accessibility and innovation, and the targets such as mature, emerging and new destinations and products, competitiveness, demand and market, governance. It aims at creating a standardised vision for tourism and culture, taking into account the digital revolution in order to address the changes of consumer behaviour (Millennial consumers) in all steps from the decision making stage to pursuing authentic expériences.

The Strategy is focusing in specific key drivers, such as technologies and organisational innovation, skills building and quality services. The STP's vision is putting the tourist at the centre, where territory and heritage, integration and interoperability, are key challenges for its succefull implementation, enphasising the concept of '*sensational trips to transform a holiday into an experience to be shared and remembered*'.

The document has been drawn up by a Standing Committee on Tourism Promotion in Italy, as result of a **participatory process and on-going cooperation of all stakeholders**, through inter-institutional joint forums, set up by the Ministry of Cultural Heritage and Tourism, between central governments, local authorities and stakeholders.

Valore Paese Italia is the national project launched in 2020 for the promotion of **sustainable tourism** connected to the enhancement of the public heritage of buildings of historical, artistic and landscape interest, which aims to contribute to the economic and social development of the Italian territories, thanks to the public-private partnership. It is a transversal and integrated project developed by the Ministry of Culture, together with ENIT - the Agenzia del Demanio and Difesa Servizi, to enhance the tourist-cultural offer and to enhance the places in a widespread sense through the design and implementation of national circuits of excellence in support of the Italian System. Those tourist-cultural projects are linked to slow and sustainable mobility, rail tourism, the network of roadside houses, the network of villages, the thematic

strand of astronomical and meteorological observatories, reserves and natural sites and UNESCO cultural landscapes, along which enhance public real estate assets.

ENIT is currently managing the **EU Eco-Tandem programme**[16], a project co-financed by the European Union in 2020 under COSME program in support of SMEs, to promote the development of sustainable tourism through transnational cooperation, capacity building and the networking of the know-how of entrepreneurs operating in the travel sector.

The objective is to find **innovative solutions to help traditional SMEs to adopt a more eco-sustainable** approach in the tourism sector, supporting them in terms of:

- strengthening skills and know-how on sustainable tourism management and the circular economy;
- learning how to initiate the ecological transition of your company;
- collaborating and learning from deep-tech start-ups;
- increasing competitiveness in the tourism market;
- accessing the financing of the eco-innovative pilot project;
- becoming part of a European network of SMEs and organizations active in the sustainable tourism sector :
- gaining visibility through the project's dissemination channels
- awareness raising for a more sustainable and responsible approaches and methodologies
- Tourism professionals, to be able to face global challenges, must invest on upgrading skills, competences, digital innovation and virtuous processes.

The **EU eco Tandem** aims at tackling this obstacle, helping the tourism industry to change its face. (https://www.eu-ecotandem.eu/). According to what is reported in the **8th Report "Italians, Sustainable Tourism and Ecotourism**[17]**"** created by the **UniVerde Foundation in 2019**, in collaboration with IPR Marketing, tourism is a constantly growing sector, with particular focus on eco-sustainability. Approximately 48% of Italians, travel means especially cultural enrichment: 61% of the population of the peninsula then decides to leave moved above all by the beauty of the nature and landscapes of the destination area. Another significant data concerns the growth and development of sustainable tourism, which for Italians will increase by 63% over the next ten years.

The combination among the **concept of sustainability with tourism represents** a necessity for the population, but also a great growth opportunity for the national economy (88% of respondents). For more than half of Italians, then, when deciding to organize a trip, the first thought goes to elements such as the destination, the structure to be booked and the means of transport, keeping an eye on eco-sustainability.

This translates into a preference for accommodation such as B&B, hotels and farmhouses: before booking, more or less 41% of users inquire about the type of the accommodation, to ensure the presence of sustainable features. For 55% of Italians, a structure that puts into

[16] http://www.eu-ecotandem.eu/the-programme
[17] Source : www.fondazioneuniverde.it

practice the principles of sustainable tourism can be defined as such if it has, in particular, photovoltaic panels, while for 33% this definition is attributable if there are energy saving systems in the building.

4.12.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

Since 2001 the Constitutional reforms law (n.3/2001) have given the regions exclusive legislative powers in tourism, leaving the central government only to coordinate national promotional and planning activities.

For this ETGG2030 project, considering that the **2 Italian chambers of commerce**, as partner of the transnational consortium, are based in **Basilicata and Friuli Venezia Giulia**, there is a focus only on the above-mentioned regions.

The **Basilicata Region** has regulated the **Regional Tourist System with regional law no. 7/2008**: it provides that the Region adopts, every three years, a regional tourism development plan to be translated each year into tourism promotion guidelines by the Tourist Promotion Agency (APT). The two Provinces of Potenza and Matera have the task of classifying the accommodation facilities and of enabling travel agencies, tourist, and nature guides, etc. to practice the profession. Finally, the municipalities can establish tourist information points.

As of 2008, the Basilicata Region has not adopted any other **tourism development plan**, leaving the spontaneity of the operators the task of adapting to the demand they were able to intercept and passively counting on the growing notoriety of Matera as an attraction factor. The **Tourist Promotion Agency** has supported the trend of flows with its promotional actions on national and international markets.

Basilicata, a small region of the Italian Mezzogiorno, has "appeared" on the tourist markets in recent years, registering growth in tourist flows (arrivals and presence) which reached its peak in 2019 when Matera was one of the two European Capitals of culture.

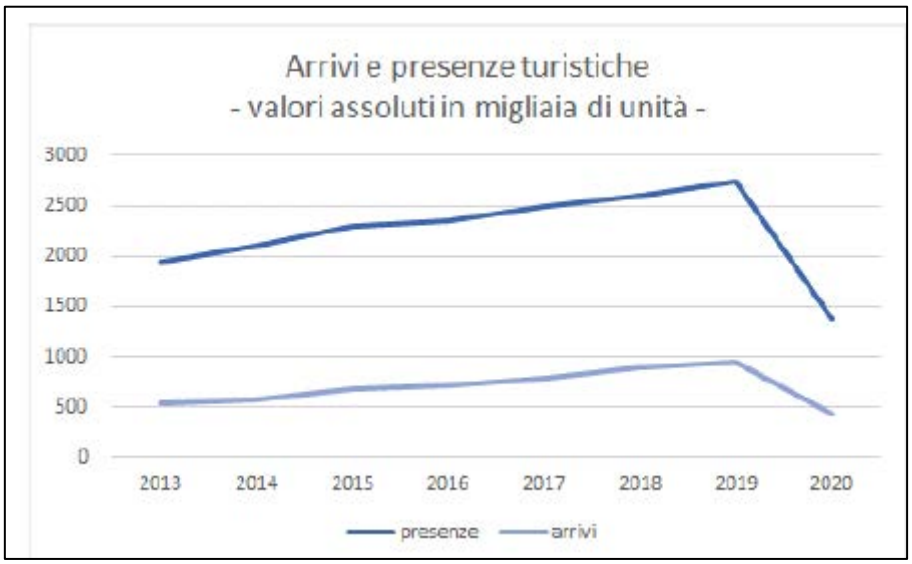

Figure 13: Tourist arrivals and presence

In a nutshell, the tourist segments of Basilicata are three:

1) the **seaside** (Ionian Coast and Maratea) that represents 50% of the tourist presences in the region;
2) the **cultural** one, which has its fulcrum in Matera and in some smaller centers in the north of the region (Venosa);
3) **mountain and rural areas** consisting of many national and regional parks, the most famous of which is the Pollino National Park, and the inland areas around the regional capital, Potenza, where the Basilicata Region has chosen to locate some "great attractions" such as the Volo dell'Angelo or the Tibetan Bridges. The interest shown by tourists for attractors has also allowed the growth, in the same areas, of **food and wine tourism**.

This condition constitutes a strategy of competitive positioning of the regional tourist offer, going to be a factor of connotation or characterization of an attractive offer. Basilicata thus becomes the region where tourism offers authenticity, **sustainability** and quality, but it still needs a lot of improvements to boost sustainable development in the sector, with a holistic and integrated approach.

In the north-east of Italy, included in the macroregion "Alpe Adria" **Friuli Venezia Giulia** overlooks the Adriatic Sea, enclosed between Austria to the north, Slovenia to the east, Veneto to the west.

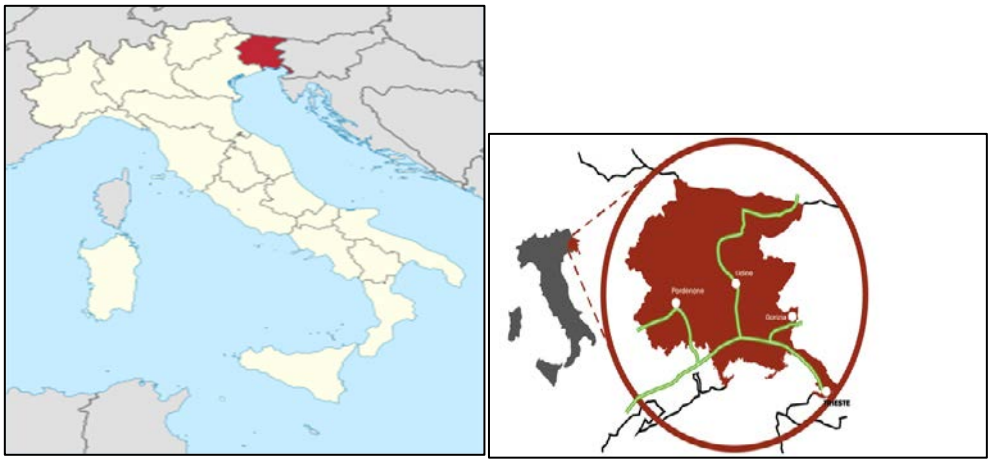

Figure 14: Geographical location of the Friuli Venezia Giulia Region

To develop and strengthen the tourism product, the **Friuli Venezia Giulia Region has adopted a Strategic Plan 2019-2023** as a planning document that processes a SWOT analysis to assess strengths or weaknesses, opportunities, and threats, allowing to carefully reflect the key issues for a process of development and growth.

In this context, the satisfaction of citizens with the environmental situation of the area in which they live is very high when compared with that of the compatriots, thanks also to the low levels of pressure on the natural environment, the higher level of urban greenery and the increased action taken to combat degradation.

Friuli Venezia Giulia Region is a successful mix of sustainability with the conscious use of natural resources, enhancing the deep bond that unites the agricultural world with the environment for the quality of life. Quality of life is also realized with tourism and culture

which jointly lead to rediscovering the roots and strengthening identity. The main assets, in this regard, are the following:

- 1 biosphere reserve "Miramare, Trieste included in the "man and biosphere" programme of UNESCO since 1979) and included in the sites of the "Natura 2000" network (since 2011)
- 69 sites included in the Natura 2000 (SPA, ASC, SCI)
- 2 Regional natural parks
- 13 Regional natural reserves
- 37 Biotopes

The Region aims at strengthening its national and international position in order to become a tourist destination at 360 degrees, open to reception 365 days a year in compliance with the objectives described above, makes use of the professionalism of the **Integrated Destination Management Organisation of the Autonomous Region** FVG for Tourism and Food and Wine born in 2016 from the merger of the **Agency for the Development of Tourism "Turismo Friuli Venezia Giulia"** in the Regional **Promotur Agency**" to develop the tourist promotion actions that it carries out in close collaboration with the public and private sector operators present in the territory.

The **Strategic Plan** emphasizes the need to enhance the professional skills of operators in the sector to develop a culture of sustainable hospitality oriented to the improvement of accommodation, to increase the entry and stay of tourists in the territory with a significant increase in the quality of services and infrastructures for tourists, with particular attention to the ski centers, the network of cycling routes and thermal resorts.

In the field of **sustainability and slow tourism,** the Regional Executive has defined, as a preliminary point, the procedures, and procedures for the recognition of paths of regional, interregional, and transnational interest to be included in a "***Register of the Friuli Venezia Giulia Path Network***".

The network of paths includes itineraries that connect, in fact, places accumulated by significant and documented historical facts or historically consolidated traditions, of historical, cultural, religious, naturalistic, environmental, landscape and food and wine interest.

4.12.2 Key stakeholders

4.12.2.1 Governmental and semi-governmental bodies

The National Tourism Observatory (NTO), has been established by the **national law 80/2005**, aiming at providing data and updated figures for the sector towards the **National Tourism Agency – ENIT**[18], which has the role to promote the "Italian" destination on international markets. ENIT develops international marketing strategies, coordinating with local authorities

[18] The **Italian National Tourism Board** has been founded in 1919 as ENIT (Ente Nazionale Italiano per l'Incremento delle Industrie Turistiche) ENIT works for Italy to promote the Country all over the world. The promotion is carried out with a corporate strategy developed by the headquarters in Rome and implemented through 28 local offices and numerous partnerships with Embassies, Italian Culture Institutes abroad, the Italian Trade Agency, chambers of commerce, Regions and local authorities

and other entities, to promote tourism in Italy abroad. To industries and organizations related to tourism it offers market research, consultancy, relationship services with the public and opportunities for promotion of sales. The overall picture of public expenditure destined for tourism in Italy is very complex. It includes the public expenditures made by the central administration, local authorities and companies.By virtue of the decentralization in place, the regions are today fully responsible for resources regarding financial investments that are allocated to the tourism sector.

The art. 1, paragraph 1, of the aforementioned reorganization law of 29 December 1993, n. 580, explicitly states that the **Chambers of Commerce, Industry, Crafts and Agriculture are autonomous bodies under public law** that perform, within the territorial jurisdiction of competence, functions of general interest for the business system, taking care of its development within local economies.

On 30 April 2019, the decree of 7 March 2019containing the **redefinition of the services that the Chamber of Commerce system** is required to provide support to business enterprises throughout the country, in relation to administrative functions and economic ones. In particular, art. 10 (entitled "Reorganization of the functions and financing of the chambers of commerce, industry, crafts and agriculture"), paragraph 1, lett. c) of the law of 7 August 2015, n. 124 (containing "Delegations to the Government regarding the reorganization of public administrations"), is provided for the "redefinition of tasks and functions, with particular regard to those of general and sector legal advertising, administrative simplification, market protection, limiting and identifying the areas of activity in which to carry out the function of promoting the territory and the local economy.

In this regard, **specific competences has been attribuited to the chamber system,** also delegated by the State and the regions, eliminating duplication with other public administrations, in order to concentrate corporate shareholdings to those necessary for the performance of institutional functions progressively eliminating non-essential company shareholdings that can be managed according to efficiency criteria by private parties".

Concerning the **promotional functions**, in accordance with paragraph 2 of art. 1, the Chambers of Commerce must carry out, as a matter of priority, the activities relating to: - **initiatives in support of the tourism and culture sectors;** - initiatives to support business development; - qualification of companies, supply chains and production.

4.12.2.2 Tourism associations

The confederations that bring together the most representative federations and associations of the Italian business categories are: Confcommercio, Confindustria and Confesercenti. In such a varied and fierce context, the three confederations present themselves on the tourism market with programs that focus primarily on the needs of the category, training and quality processes.

CONFCOMMERCIO was founded in 1945 as a trade union organization and has always had a "pyramidal" structure in the geographical sense and "transversal" in the sense of categorical subdivision of representation. It is a real political guide of the organizational system.

CONFTURISM: expression of the tourist federations belonging to Confcommercio, it has the task of representing the requests of the categories in a unified manner, contributing to the elaboration of political union actions. Confturismo is joined by FIAVET, Federalberghi, Faita, Fipe and Rescasa.

FIAVET: is the Italian federation of travel and tourism business associations. It has been established in 1961following the intution about the potential of the tourist phenomenon that was appearing on the national and European market. To give a figure of the importance of FIAVET for the sector, suffice it to say that it signs national labor contracts with the workers' unions. AINET (Italian Association of Tourist Networks) belong to it, founded in July 2001 with a strong scientific vocation, every year, on the occasion of major events such as ITB (International Tourism Bourse), it proposes seminars or conferences where it presents research on the innovative aspects of the organized tourism distribution sector.

FEDERALBERGHI: brings together and represents 30 thousand companies in the national hospitality sector. It was founded in 1899 as Italian Hotel Federation and was reconstituted in 1950 with the name of Faiat. In 1994 it definitively took the name of federalberghi as a sign of a decisive change aimed at strengthening the value of the sector within the tourism sector.

Italian association Responsible tourism brings together travel organizers, environmental organizations, NGOs, cultural associations, cooperatives, hospitality operators, service companies.

4.12.2.3 NGOs, Sustainable Tourism Networks and partnerships

The **Forum of the Chambers of Commerce of the Adriatic and Ionian Region (AIC Forum)** is a non-profit transnational network, since 2013, which unites the Chambers of Commerce belonging to the countries of the Ionian Adriatic Region – (same as EUSAIR strategy): Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia, and Slovenia. The mission of the Association is to enhance synergies and opportunities for the socio-economic development of the Ionian Adriatic Area, recognized by the Council of the EU as the third European Macroregional Strategy (after the Baltic (EUSBSR) and Danube regions (EUSDR), followed by the last Alpine macro region (EUSALP).

The **AIC Forum** is one of the main stakeholders of **EU Strategy of Adriatic and Ionian Region** - EUSAIR, a strategy that enhances the cultural heritage and the richness of the realities present in the area, translating into concrete the concept of territorial cohesion, environmental protection, and sustainable economic and social development without creating new structures, but using existing networks.

Among them, the AIC Forum is the body engaged in the development, the process of lasting growth and the dissemination of the experiences and potentials present in the economic and productive fabric of the Ionian Adriatic Area. They provide workgroups on:

- Blue Growth
- Connecting the Region
- Environmental Quality and Agriculture
- Women Entrepreneurship

- **Sustainable Tourism**

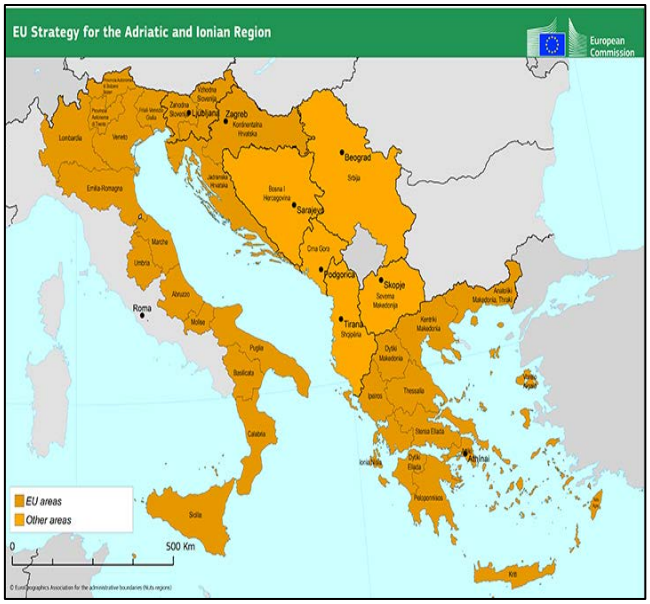

Figure 15: EUSAIR territory, 4 Member States and 4 non-EU countries

The **Chamber of Commerce of Basilicata** has promoted the establishment of a **network of Chambers of Commerce (Mirabilia)** which have the common characteristic of "hosting" on their territory a site recognized by UNESCO (World Heritage Site, GeoPark etc.) but less known to the public. The network is now an Association bringing together 18 Italian Chambers of Commerce; it has promoted the establishment of a **European Network** which includes about **30 Chambers of Commerce from France, Spain, Greece, Croatia, and Bulgaria.**

Mirabilia pays particular attention to the sustainability of tourism: one of the largest Italian Chambers of Commerce, Treviso/Belluno, is responsible for the topic for the Association, while in 2019 the Udine Chamber of Commerce organized a short **training course** in which the trainers concretely illustrated to the employees of some European CCIs of the network the contents and characteristics of some *tools for environmental certification*.

4.12.2.4 Relevant Research and educational bodies

Hospitality & tourism is one of the largest industries in the world, but it requires to tackle the global challenges with are affecting the sector in the last few years (digitalization, sustainability climate change, pandemic crisis, quality of services), and it is crucial upgrade the skills of the workers engaged in different ways.

In this respect, several Universities in Italy are actively involved in annual masters on tourism economy organization, such as **Bocconi and Cattolica University in Milan** which organize trough the Sustainable tourism masters, or the **Center of sustainable development and Protection of Mountain at University of Milan- UNIMONT**, or other academic bodies like the **Universities of Trento, Bologna, Venice** with their academic courses on hospitality management, hotels and events with more ecofriendly approaches. Successful professionals have certain skills like basic administrative abilities, planning & scheduling, and excellent customer service & communication skills.

ISNART' (Italian Institute on tourism research) is using since many years as pioneer, **digital research** and predictive analysis platforms is a unique model in Europe, created to be made available to institutions and businesses. Since 2019, they have already acquired big data platforms both in terms of real-time reading of information and in a predictive perspective working for the Ministry of Tourism for the Tourism Digital Hub, to ensure a workflow of updated information tool for businesses and public and private operators.

4.12.2.5 Individual tourism businesses and destinations of particular relevance

Since 2007, the European Commission has supported EU countries in rewarding non-traditional, emerging sustainable tourism destinations in Europe through the EDEN award. The European Commission modified EDEN for position winning destinations to stand out as tourism sustainability pioneers. Some excellences can be identified with the small towns from Puglia, Sardinia, Lazio, Tuscany, selected as **EDEN destinations** (European destinations of excellence), because they can present their non-polluted and authentic territories, preserving the value of their local identities.

The list of the **8 Italian destinations awarded by the EU Commission includes** very different locations, but in any case, characterized by the fact that even before new EDEN's focus on the tourist sustainability, they were destinations paying attention to environmental sustainability. This is also the case of Guspini, one of the two locations in Sardinia awarded over the years. Old mining centre, it has managed to get rid of the burden of a bad environmental reputation by reinventing uses different for the buildings used for mining. Or the case of the Valdichiana Senese, in Tuscany, where the environmental heritage of the area has been kept intact over the centuries, because its inhabitants are aware that it is their economic “treasure” as it allows a rich and renowned agro-food production.

4.12.3 Activities and instruments for the development of sustainable tourism

In Italy, the central administration at national level collaborate joining financial investments (public money) with the **European Investment Bank** in funding sustainable tourism activities trough subsidized loans mechanism. Nothing else is known about objectives, purposes, etc. except that it will have an endowment of 350 million to be raised on the financial markets.

Direct revolving fund (i.e 180 million euros in 2019, has been inveted to facilitate access to credit and investments in the tourism sector for small and medium-sized enterprises with a 50% reserve for green and digital investments (but here we understand that green investments are means above all energy efficiency of buildings.

4.12.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Borghi Autentici d'Italia is an Association that brings together small and medium-sized municipalities, territorial bodies and mixed local development organizations, around the goal of a **sustainable**, equitable **local development model**, respectful of places and people and attentive to the enhancement of local identities. The goal: to rediscover the Italian villages as places to live, support and preserve

A village is beautiful if it is not only beautiful in its historic center, but in the different parts that make it up, or in the values of use, in the cultural values, in the economic values to understand what they mean Urban decor and beauty of the village The search for innovative technologies to be applied to existing homes to reduce consumption does not exhaust the theme. Aspects which affect quality of life inside a home are manifold: the impact on the environment, architecture, plant equipment, the safety and health of those who live there.

To face this perspective, it is necessary to adopt the logic of "**Resilience**": that is, the ability of an ecosystem, including a social one, to survive and adapt to external traumatic events. A process in which economic, social, political and cultural endowments are played with an evolutionary, transitional, metamorphosis approach. Resilience is the opposite of rigidity, one resists to go further, not to "close oneself" in resignation or despair but to open up in hope as a conscious aspiration for a new and promising future.

4.12.3.2 Marketing and information services supporting sustainability in tourism

A growing trend for purchasing online travel products / travel packages is becomes a daily life reality. Therefore, online businesses or even platforms created by offline businesses, which offer tourist services, are starting to emerge, perhaps even with the aim of aggregating consumers and developing spontaneous communication flows. These are the companies that innovate, companies that have not stopped using the social networks present to exploit them as sales channels or better, long-term loyalty, but have done more, have created special social network of social and participatory tourism, of what today they call **tourism 2.0.**

The first case seems to be attributable to **Treeboo**, a social network in the form of a community, which exploiting the economic logic of purchasing groups, aims to aggregate people who want to buy travel packages and therefore, people who want to make the same trip in the same destination to obtain discounts deriving from the economies of scale of the purchasing groups. Community users, thanks to a tool called Waiting List, put themselves on a waiting list for their favorite travel package. Treeboo also allows interaction between users from a web 2.0 perspective, in the sense that it is the users themselves who propose their travel destinations to the community. In essence, therefore, those who want to take a trip, at affordable prices and perhaps socializing and sharing experiences with other users of the network, just have to subscribe to **Treeboo.**

In Italy, there are also other social networks which do something different, such as **TravelPeople** and **TravelTradeItalia**. The first is a tool that puts qualified travel agents from all over Italy in direct contact on the web with travelers wishing to organize their vacation. The operating logic is quite simple: travelers registered on TravelPeople.it express their needs relating to their next vacation by filling out a Travel Card and requesting to get in touch with specialized agents able to offer them the best solutions. Travel agents registered with TravelPeople must fill in their profile and can post travel offers for free. TravelPeople communicates to travelers online through multiple web marketing tools including social networks, search engines, mailing lists, sweepstakes, blogs and forums on tourism. Traveltradeitalia.com is the first social network of the Italian tourism product.

4.12.3.3 Tourism Sustainability Certification Systems and Awards

This activity is more related to environmental protection and recognised and official certification systems and labels like Ecolabel and EMAS.

The overall picture about sustainability certification schemes of Italian tourism companies (namely small and minor enterprises) is quite varied. The "lion's share" among the certification schemes is carried out by the "Legambiente Turismo" label granted to over 200 hotels, agritourism, restaurants, holiday homes, etc. The number of Ecolabel certified accommodation facilities is instead (as of February 2021) of 57: the tourism sector is the sector with the highest number of certified companies.

The number, until the expiry of the licenses in 2018, was much higher, exceeding 200 units. Far less widespread are other sustainability certification schemes: there are less than 20 "GreenKey" certified structures, about 15 "BioHotel" ones (and mostly located in South Tyrol), a few "GreenGlobe" or "TravelLife" certified structures[19], etc.

Other local examples are referred to some protected areas like the **Regional Natural Park of the Friulian Dolomites**, which was officially EMAS Registered with registration number IT - 001,43, in 2014 or some companies like **MuMa Hostel** (a combination of hotel+ Museum of the Sea+Shipwrights+ Center for Environmental Education and Sustainability)

ISPRA (**Higher Institute for Environmental Protection and Research -** *Istituto Superiore per la Protezione e la Ricerca Ambientale*), is the Agency of the Italian Ministry of the Environment which coordinates at national level the activities of the Regional Agencies for the Protection of the Environment (ARPA). ISPRA and the Regional Agencies together represent the National System for Environmental Protection (NSEP), which are also responsible for the assessment of the criteria and the procedures to obtain in Italy the European certifications such as Ecolabel, becoming the interface with the European Commission (DG Environment), in this regard.

4.12.3.4 Capacity Building for Sustainable Tourism

As far as **capacity building activities on sustainable tourism** are concerned, there is no structured offer at national level, due to the attribution of the tourism competence to the 21 Regions, by the constitutional law n.3/2001.

Therefore, some specific examples are provided in relation to the Basilicata and Friuli Venezia Giulia region, where the 2 chambers of commerce involved in the ETGG2030 project are involved.

The former **Chambers of Commerce of Potenza and Matera** (united in a single Chamber of Commerce of Basilicata since 2018) within the scope of the functions assigned to them by Law 580 of 29 December 1993 have guaranteed the tourist companies services for the qualification of their products, training actions on business management, participation in sector fairs in Italy and abroad, etc. On behalf of the Basilicata Region and the APT, they have created a **Tourism Observatory** for several years to monitor the trend of tourist flows, the size and quality of the tourist offer, etc. The Chamber of Commerce of Basilicata is also a member of the EEN

[19] Source: websites of the organizations owning the labels; ISPRA for Ecolabel

(Enterprise Europe Network), guaranteeing qualified services to businesses also in terms of environmental sustainability in general.

The Chambers of Commerce are a privileged partner of upper secondary education institutions for the design and implementation of alternation between school and work projects. The Chamber of Commerce of Basilicata has its own **School and Vocational Guidance Service** which collaborates with many schools in the region on this topic. With two **Technical Institutes for Tourism** (Viggianello and Melfi) the CCI tested an action aiming to raise students' awareness of the importance of applying the criteria and principles of the **circular economy and sustainability to local tourism**. Unfortunately, there is still a lack of structured and continuous training supply, neither public nor private, in the field of sustainable tourism. In other words, there is no record of the existence of degree courses, courses of study of high schools, masters or other higher education courses, specialization schools, etc., but rather individual interventions of a laboratory or seminar type organized occasionally. The Chamber of Commerce of Basilicata intends to report the "*Destination Makers*" course, to be carried out during the annual event of the Mirabilia Association to be held in Caserta in November 2021. The short course, aimed at all those involved in planning tourist destinations, will dedicate a **module to tourism sustainability** held by a representative of the **Tourism Promotion Agency of Slovenia**.

The **Chamber of Commerce of Pordenone-Udine** has been officially formed on 8 October 2018 following the merging of the previous Chambers of Commerce of the two territories as provided by the **national reform of the Chambers of Commerce** (Legislative Decree No 2019/2016). The chamber operates in a production system consisting mainly of micro-enterprises and small enterprises, accounting for 92 % of the territory and almost 80 % of the region’s productive fabric, of those active in the industrial sector 88 % have fewer than 10 employees and in the tertiary sector the share reaches 97 %. In total, more than 90 thousand companies are active, 60 % of which are set up individually.

Specifically referring to the **tourism sector PromoTurismo Friuli Venezia Giulia - FVG** foresees for 2022 the development of actions aimed at a complete mapping of the degree of sustainability of the sector and consequent targeted actions to support operators in achieving any certifications, activation of sustainable virtuous processes and activities to promote products and services.

To support the development of the cultural sector and cultural and creative enterprises, qualifying its growth through innovation and knowledge, the **Friuli Venezia Giulia Region** has set up the **Culture and Creativity Cluster**, establishing a fruitful public and private collaboration, to be able to properly manage various activities to give impetus to cultural and creative activities/industries.

The tourism sector has been identified strategically for the smart and sustainable growth of the Friuli Venezia Giulia Region, as the diffusion of culture and the strengthening of the cultural and creative system are the prerequisites for an overall growth of the person and the entire community. This area of regional specialization is also an entrepreneurial sector in which the financial resources available for the development of the economic fabric of the

territory and for the dissemination of innovation across all production sectors can be usefully used.

It has also carried out and carries out seminar activities. Since 2013 as part of the "**Friuli Future Forum**" project, aiming at highlighting what is already of the future in Friuli and at bringing to Friuli ideas, projects, future inspirations that other areas and cities of the world have successfully put into practice, producing development. The Friuli Future Forum project was founded in 2010 from an intuition by the **Udine Chamber of Commerce** to fulfill in an innovative way the tasks of supporting the economic and social growth of the territory: an open place, in continuous transformation, producer and promoter of new ideas, paths and models.

This forum of the twenty-first century is a meeting place — on site and virtual — for companies, citizens, and institutions, where they can share experiences, good practices, suggest projects, meeting with scholars, analysts, international entrepreneurs, to inspire the growth of the territory with new ideas and experiment solutions for Friuli that will come. This was Friuli Future Forum: an open place, in continuous transformation, producer and promoter of ideas. Friuli Region can develop in advance the skills, models, and innovations that future economic guidelines will require.

The Region has been focusing in the last 5 years in developing skills, sustainable business models, innovation, climate change and environmental issues, to tackle the current and future challenges for the sector and to inspire with new ideas and paths for entrepreneurs, boosting the economic growth of the territory.

4.12.3.5 Financial Support for SMEs in regard to sustainable tourism activities

At national level, in Italy, being the matter of tourism constitutionally the exclusive competence of the Regions, there are no national funds to support the sector, nor its sustainability. There are certainly public notices and notices that individual regions issue periodically, usually financed under the regional operational programs, which among the many types of investment admitted also include those for sustainability, usually declined in terms of energy efficiency or reuse / rehabilitation of existing buildings used as accommodation facilities or acquisition of environmental certifications.

There are other funding measures managed by **Invitalia,** the Investment Attraction Agency of the Ministry of Economic Development. It is about:

- "**Cultura Crea**", the incentive that supports the birth and growth of entrepreneurial and non-profit initiatives in the cultural, creative and tourism industry sector, which aim to enhance the cultural resources of the territory in the regions of Basilicata, Calabria, Campania, Puglia and Sicily (maximum contribution: € 400,000, of which 40% non-repayable);
- "**Resto al Sud**", the incentive that supports the birth and development of new enterprises (including tourism) and freelance activities in Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sardinia, Sicily (maximum contribution: € 60,000.00 of which 50% non-repayable);

- "**New Businesses at Zero Rate**", the incentive for young people and women who want to become entrepreneurs. The grants can cover the whole of Italy and provide for a mix of zero-interest financing and non-repayable contributions (maximum 20%) for business projects with costs of up to 3 million euros.

However, it is possible to focus on some examples at regional level, such as the Basilicata and Friuli Venezia Giulia regions:

1. The **Basilicata Region** manages the **Regional Operational Program of EU Funds**, including the upcoming **React-EU fund**, where it finds the resources to issue tenders for the financing of SMEs in all productive sectors, including tourism. It is missing an always active tool allowing entrepreneurs (or aspiring entrepreneurs) to submit requests for financing when they need subsidies for investment, forcing them to postpone it or get into debt with the banking system. The Region prefers to issue deadline calls: therefore, the company can submit the request only in the operating window of the call.

   One of the latest measures issued by the **Region to finance the tourism sector** is the call "*Quality accommodation for Lucanian enterprises*" dating back to 2018. It has financed material investments (construction, renovations, machinery, equipment, furnishings, etc.) and intangible investments (computer programs, quality, and environmental certifications, etc.) of hotels and other holiday accommodation with a contribution maximum, non-repayable, equal to 45% of expenses incurred.

To close the overview of **financial instruments**, the Basilicata Region releases, through the APT, a non-repayable grant to schools and institutions that organize school trips, group tours or congresses in the regional territory (DGR n.854/2015).

2. Regarding the **Sustainability in the regional cohesion policy 2021-2027**, **Friuli Venezia Giulia** has assigned the role of Environmental Authority with DGR (Regional Decree) No 871/2020 to the Central Director for the Protection of the Environment, Energy and Sustainable Development.

With the following tasks:

- Ensure environmental integration and strengthen sustainable development orientation at all stages of the preparation, implementation, monitoring and evaluation of regional programs (RDP, RDP-ERDF and PAR FAS), including those falling under the European territorial cooperation goal (Operational Program Italy — Slovenia and Operational Program Italy — Austria);
- Promote and monitor the integration of the environmental component into all areas of action of the funds covered by the 2021-2027 programming, so that the strategies and actions proposed by the programming documents are consistent with the principles of sustainable development, as indicated by the EU, and compliance with Community environmental legislation
- Cooperate with the programming and management authorities of the operational programs in the preparation of programming documents and the drafting of

subsequent implementing acts, as well as throughout the implementation, monitoring and evaluation of the programs

- Cooperate, for the aspects within its competence, with the programming and management authorities for operational programs, in the application of Directive 2001/42/EC on Strategic Environmental Assessment (SEA).

4.12.4 Summary and conclusion on national situation

4.12.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The Chamber network enjoys capillarity and proximity to local and regional enterprises and authorities with whom they work and collaborate hand in hand.

For this reason, Chambers of Commerce acting as a mediator and helping disseminate initiatives, information, programs could play a major role in **supporting SMEs** in their task to become more, **greener, digital, and competitive,** based on sustainable business models for up-skilling and reskilling the touristic taskforce. **Digital skills** hold special importance for SMEs of the sector, which many times must customize their websites and booking tools on their own, thus require employees capable of doing so. Hence, digital training in this sector is paramount. Chambers are already applying their expertise to reach out to SMEs through workshops, participation to VET, and training courses, and supporting the digital up-skilling of SMEs. In many Member States, they can also provide policy makers and relevant stakeholders with information of digital maturity of SMEs and have relevant data of digital innovation trends and relevant skills mismatches or missing/sought after skills.

The **Italian chamber system** has long tradition in promoting **environmental protection** towards small businesses, since the national legislator assigned the Chambers of Commerce the task of keeping the Register of Environmental Managers. Thanks to the work carried out by the Chambers of Commerce and trade associations, a growing number of entrepreneurs are aware of the competitive advantages deriving from the **ecological and digital transition**, in line with the **EU Green Deal and Fitfor55 Package**, launched by the European Commission.

Many Chambers participate in **DMOs (**Destination Management Organisation or coordinate with other relevant stakeholders at national, regional, and municipal levels to destination management activities, take part in brand development and tourism labels (for sustainability, slow tourism, etc), and are very active in promoting networking. Chambers promote available funding opportunities and improve access to different tourism models and reduce regional vulnerabilities.

Unioncamere and Isnart have recently developed an **AI Big Data Platform** on tourism which allows crawling, integrating and analyzing large amounts of data from different sources managing the heterogeneity of information generated by tourists and visitors through social networks, the web, blogs and communities and can provide precious information and knowledge to identify trends and development patterns, information on the evolution of tourist destinations and tourism products, assess the performances achieved by the companies in the sector through data analysis techniques.

4.12.4.2 Challenges for the development of sustainable tourism and for SMEs

Italy is doing its part: the PNRR recently approved by the government dedicates almost 60 billion euros to the ecological transition, which are destined, among other things, to improve the capacity for efficient and sustainable waste management, to increase the energy share produced from renewable energy sources, to increase the energy efficiency of the public and private housing stock.

Households and businesses also actively contribute to the set objectives: Italy has a waste recycling rate of 79.4%, the share of electricity produced from renewable sources in Italy has reached 37%, the replacement of secondary materials in the Italian economy determines the saving of 63 million tons of CO_2, almost 450 thousand companies have invested in green products and technologies in the last five years, etc. Tourism represents a vital economic sector for our country and promoting the sustainability of the companies that operate there is essential not only to respond to the challenges and objectives set by EU strategies but also to intercept a market segment, that of the so-called green travelers, constantly growing both in numbers and in propensity to spend. The interventions necessary to ensure energy neutrality are of various kinds: from energy efficiency to the reconversion and reuse of buildings for tourism purposes, to the recovery, as furnishing elements, of artifacts otherwise destined for landfill or abandonment, to the reduction of inputs of energy and raw materials in the provision of services etc.

According to the data of the **Observatory on the tourism economy of the Italian Chambers of Commerce**, elaborated by *ISNART-UNIONCAMERE*, the good results of the summer period do not compensate for the losses suffered by the entire tourism sector due to the substantial blockage of the activities of the whole first part of the year.

The first nine months in fact recorded a decrease of 40 percentage points compared to the same period of 2019 and 2021 will close with a growth limited to + 2%. For some regions, the trend of the large art cities has weighed, which, even in the summer, absorb an important share of tourist flows (on average over a quarter of total presences). In these destinations, although the improvement in the summer months of 2021 was significant in terms of overnight stays (+ 35% compared to 2020), the losses incurred on an annual average are still substantial (-23%), placing these locations still 60 points percentages below the 2019 level. Homogeneous, multilevel, and increasingly certified and integrated information will allow strategic planning for the benefit of the sector and will make tourism planning increasingly traceable and methodical. This innovative data collection and analysis system will facilitate phenomenological knowledge to support decision-making processes of all operators in the sector.

4.12.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The summer of 2021 was still significantly affected by the effects of the pandemic on travel and tourism choices, with vacation decisions becoming increasingly close to departures. Overall, the season recorded a significant recovery with an average increase in overnight stays of about 30% compared to the same period of 2020. The trend in June and July was significant within the seasonal data, which recorded growth very sustained (+ 40%), and then stabilized in

August (+ 22%) and recorded a more contained growth in September (+ 6%). Tourist demand was well above the national average in almost all regions of Southern Italy (Sicily and Sardinia + 39%; Calabria, Puglia and Campania around + 33%) and in some areas of the north (Veneto and Lombardy recorded an average growth of 37%).

The data of the N**ational tourism Observatory** indicate that the recovery of tourist attractiveness by the great cities of art remains a central theme for the relaunch of Italian tourism - also in light of the trend recorded by smaller cities of art (such as Ravenna, Verona, Matera, Lecce, Ferrara, etc.) which in 2021 was positive and in some cases higher than pre-pandemic levels. In terms of tourist attraction, the great cities of art represent a strategic asset that the country cannot afford to neglect. The positioning and tourism organization must therefore be rethought to return in a sustainable way to the values of 2019 and look to the future; The recovery was more contained in the areas with the highest density of cities of art (Lazio and Tuscany), while Veneto, being able to take advantage of a wider and more varied offer, showed a dynamic above the average of the country. Good results were also achieved by some central regions such as Umbria, Marche and Abruzzo which counted on a notable strengthening of internal and local tourism. Between June and September, Italian accommodation companies sold on average 58% of the available rooms, with a significant improvement compared to the same period of 2020, with a peak in August when an average occupancy rate was reached. 84%. This trend was recorded above all in marine and lake destinations, while it spread with less intensity in the mountain and rural areas of the country.

4.12.4.4 Recommendations for boosting Sustainable Tourism for SMEs

A transition pathway bringing together all the stakeholders is extremely important, taking into consideration the following priorities:

- Need to increase the number of public grants at all levels (national, EU, international) while simplifying the process to obtain funding, in conjunction with less red tape.
- Need to invest in infrastructure to allow a greener mobility and climate -neutral tourism ecosystems, while increasing the number of proximity travels with climate-neutral vehicles and reducing the emissions of local transport.
- Need to better coordinate awareness campaigns by relevant stakeholders rather than fragmentation in a myriad of events.
- Need for diagnosis/initial assessment reports of current situation of the destinations, as well as the analysis of good management practices that are being developed in other destinations, to define a starting point and design new planning and management policies enabling to benchmark. By converse, there is a need to measure the destinations' sustainability management processes, to monitor their performance and progress over time;
- Need for increased attention in tackling the issue of massification of certain destination and tourism activities, given that in most scenarios this results in unsustainable practices;

- Need to substantially increase the use of sustainability labels by tourism accommodation. The label Ospitalità Italiana promoted by the Italian Chambers of Commerce is clear evidence of what can be locally done by active stakeholders.

Better stakeholder coordination can support the implementation of these pathways.

In this respect, the role of Destination Management Organisations – DMOs- should be enhanced. The activity developed by the Chamber of Commerce of Verona in this context shows the potential of this tool. In addition, data collection is essential to ensure sustainable management at destination level based on measurement and using existing proven monitoring tools at European and international level, such as European Tourism Indicators System – ETIS, Global Sustainable Tourism Criteria – GSTC, Green destinations, among others.

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4.13 Netherlands

Eke Eijgelaar, Paul Peeters and Tamina Reinecke
(AS of June 2021)

4.13.1 Political framework for Sustainable Tourism

4.13.1.1 National Sustainable Tourism Policies and Strategies

The main vision for the development of tourism in the Netherlands is **"Perspective 2030",** published by the Netherlands Board of Tourism & Conventions (NBTC) (NBTC Holland Marketing, 2019). Perspective 2030 has been written after over-tourism became a priority issue in a number of places in the Netherlands and is clearly presented as an answer to this problem. Other sustainability issues, like carbon emissions, also featured in previous vision documents, but a more sustainable development of tourism in the Netherlands is now clearly priority. Hence, Perspective 2030 is about the changing role of tourism and the sustainable development of the Netherlands as a destination, requiring a new approach that prioritizes the common interests of visitors, businesses and local residents. It should ensure that tourism contributes to the prosperity and well-being of all Dutch people.

Perspective 2030 contains five priority areas in this respect:

- Benefits and burdens are in balance: more benefits from tourism than burdens
- All of the Netherlands is attractive: put more cities and regions on the map as attractive destinations
- Accessible and achievable: easily accessible cities and regions
- Sustainability is a must: a living environment with less waste and pollution
- A hospitable industry: the Netherlands as a welcoming destination

Perspective 2030 has been based on input from more than one hundred experts working in tourism, mobility, education and culture. Residents and various levels of government were also involved. NBTC notes that Perspective 2030 can only be achieved through broad cooperation with the tourism industry and government authorities. An agenda for action was established for this purpose by the Ministry of Economic Affairs and Climate Policy together with all Dutch provinces (EZK, 2019). The 2019 advice of the Council for the Environment and Infrastructure (Raad voor de leefomgeving en infrastructure, Rli) directly fed into this advice (see next paragraph). Next to the spreading of tourists throughout the country, the development of a national data alliance for better insights on visitor behaviour and sustainability is a core topic. NBTC's dashboard on 'the state of destination Netherlands', under development in cooperation with Statistics Netherlands (CBS) and the Centre of Expertise Leisure, Tourism and Hospitality (CELTH), is the main visible output of the latter agenda point (NBTC, 2021).

The Council for the Environment and Infrastructure (Rli) advises the Dutch government and Parliament on strategic issues concerning sustainable development. Their report "Desirable Tourism: Capitalizing on opportunities in the living environment" (Rli, 2019) investigates current issues in the relationship between tourism and the living environment and guides tourism management for sustainability. They support policy makers by providing suggestions

on effective tourism governance, i.e. cooperation between authorities, proactive stakeholder management and the development of a knowledge infrastructure. Beyond they provide a framework to develop regional tourism development strategies.

Tourism policy in the Netherlands takes up SDGs 4, 8, 16 and 17. Therefore the focus lies on education in sustainable tourism as well as human trafficking and child sex tourism (Kingdom of the Netherlands, 2017).

Beyond destinations, transport is a core part of tourism and its policies decisive for overall sustainable tourism development. The Civil Aviation Policy Memorandum 2020-2050 (I&W, 2020b) includes inter alia plans to expand the Air-Rail connectivity, research studies on health and noise issues for citizens living close by airports and a national obligation to use biofuel blending in 2023. By 2030, the governmental Sustainable Aviation Table aims to replace 14% of its fossil kerosine increasing to 100% biofuels in aviation in 2050. In their memorandum "Position paper international rail passenger transport" (I&W, 2020a), the Dutch Ministry of Infrastructure and Water Management invited the EU member states and the European Commission to jointly take international railway passenger transport forward with a cross-broader network of high-speed trains. Traveling by train is therefore expected to become more common and tourist trips more sustainable.

The **Taskforce Hospitality** was founded during the COVID-19 pandemic to work together on a sustainable recovery of the tourism and hospitality industry. It is a consolidation of the Ministry of Economic Affairs & Climate (EZK), the national council for tourism, recreation, catering/hospitality and leisure Gastvrij Nederland (Hospitable Netherlands, see 4.12.2.2), trade associations, the Association of Provincial Authorities (IPO), the Association of Netherlands Municipalities (VNG) and CELTH. In February 2021, they presented their action plan to the parliament. Long term cooperation between government, destination management organisations (DMOs), industry and research stand at its core. In cooperation between private and public partners, it is to be investigated how SME's can make better use of instruments, tools and subsidies that promote innovation, digitalization and sustainability. Hereby bottlenecks are to be identified, information overviews established, and creative working methods used to spread the knowledge. Through a low threshold, the activities are made accessible and profitable for SME's. Priorities of action are determined based on a scenario planning that uses a phases model on basis of the epidemiological situation. In times of low mobility, focus lies on the domestic market and neighboring countries as well as innovating the current offer by the digital experience roadmap (Keijzer, 2021).

4.13.2 Key Stakeholders

4.13.2.1 Governmental and semi-governmental bodies

The **Ministry of Economic Affairs and Climate Policy (EZK)** is responsible for tourism and recreation. The state secretary is the highest policy officer for this domain. The EZK pays the NBTC an annual subsidy of around 9 million euro to manage tourism on a national level.

The **Netherlands Board of Tourism & Conventions (NBTC)** is the national destination management organization (DMO) of and for the Netherlands. NBTC has provided a national

vision for tourism based on relevant knowledge and insights, aiming to make the Netherlands a livable, popular and valuable destination for residents, visitors and companies (NBTC Holland Marketing, 2019). The current strategy, Perspective 2030, offers several opportunities for sustainable development. SME's can benefit from their plans to push public-private investments and an open data platform as well as the bottom-up approach to developing tourism in destinations based on stakeholder needs. Hereby, special attention is paid to sustainable initiatives such as awareness raising, taxing polluting activities, sustainable transport and the hospitality and catering sector (horeca).

4.13.2.2 Tourism Associations

Gastvrij Nederland ('Hospitable Netherlands') is the national council for tourism, recreation, catering/hospitality and leisure, and represents 16 organizations and branches of the leisure economy. It aims to overall strengthen touristic-recreative activities in the Netherlands in order for these branches to grow into a dynamic and sustainable industry. Their main goal is to generate more visitors and more expenditure in the Netherlands. Therefore, their approach to sustainability is to support sustainable initiatives with a unique selling point, share best practice examples and lobby to remove obstacles and stimulate tax measures that support sustainable tourism development. Through the **Taskforce Hospitality Sector**, Gastvrij Nederland brought together trade associations, the NBTC, CELTH, IPO, VNG and the ministry of economic affairs to better cope with the severe impacts of COVID19 on the hospitality sector. Beyond the COVID19 crisis, the network aims to structure the sustainable recovery of the sector and strengthen the lobby of tourism in political decision making.

The members of Gastvrij Nederland are all key stakeholders in Dutch tourism and recreation (see here for an overview). A number of these organisations support SMEs in becoming more sustainable:

- The **General Dutch Association of Travel Agencies** (*Algemene Nederlandse Vereniging van Reisbureaus, ANVR*) is the travel trade organization in the Netherlands representing 90% of outbound package travel market. They set up a policy that requires all his members to meet a minimum of sustainable practices. The Travellife for travel companies approved by the GSTC (Global Sustainable Tourism Council) sustainability performance assessment is used to certify sustainable practices. This includes sustainability management, sustainable operations, supply chain management and customer awareness (Travellife.info/Standards and Criteria, 2021).
- **HISWA-RECRON** is the trade organization for water sports and recreation businesses and an important voice for SME's. It lobbies actively on all kinds of sustainability-related issues, and also provides a knowledge platform, including on sustainability, for its members.
- The **Royal Dutch Touring Club ANWB** (*Koninklijke Nederlandse Toeristenbond*) offers all kinds of services related to travel, recreation, tourism and mobility, but it is also active in lobbying in the fields of driving, mobility, travel and recreation. With 4.4 million members, it is one of the stronger lobbies for tourism and recreation

businesses with a transport link. Very long a proponent of car travel, it has recently shifted more towards a mix of sustainable mobility forms.

- The **Association for Small-Scale Travel Companies** (*Vereniging vor Kleinschalige Reisorganisaties, VvKR*) consits of 407 small-scale, specialized tourism organizations. The platform is mainly used for marketing, travel insurances, inspiration and knowledge sharing. With their Handbook Sustainability for small-scale travel companies, they offer SMEs knowledge and best practice examples on sustainable transport and operations, customer awareness, projects and certifications.
- The **Royal Climbing and Mountaineering Association** (*Koninklijke Nederlandse Klim- en bergsportvereniging, NKBV*) is dedicated to sustainable use of mountain areas and educates its members on sustainable alternatives and trade-offs in the practice of mountaineering.

4.13.2.3 NGOs, Sustainable Tourism Networks and Partnerships

The two major nature conservation organizations in the Netherlands are **Natuurmonumenten** (Dutch Society for Nature Conservation) and **Staatsbosbeheer** (government organization for forestry and the management of nature reserves) with 100,000ha and 273,000ha of nature area respectively. Both organizations promote low-impact nature tourism on their premises.

Several NGOs support the sustainable tourism transition in the Dutch travel market. The Amsterdam-based NGO **European Centre for Ecological and Agricultural Tourism** (**ECEAT**) manages the international initiative "**Travelife**" for Tour Operators and Travel Agents, which promotes and certifies sustainable practices. The ANVR encourages all its members to become Travelife certified. As of June 2021, their coaching programme was completed by 79 Dutch companies of different sizes. The Leiden-based NGO **Green Destinations** aims to make tourism destinations more sustainable. Based on the SDGs and sustainable tourism principles, they already trained and certified 200 destinations in 60 countries. Beyond they are hosting the website **Good Travel Guide** which is a sustainable tourism knowledge source for tourists. The NGO **Fair Tourism** is a communication organization that supports sustainable tourism transitions by volunteering in local communities worldwide to raise awareness for nature protection and social inclusion. Beyond the NGO **Nature and Environment** engages in national tourism projects, for example "Fly less and travel differently" (*Minder vliegen en anders reizen*). They work with companies and the Dutch governments to develop sustainable solutions and inform consumers.

4.13.2.4 Relevant research and educational bodies

In the 2010s, Universities of Applied Sciences with tourism programmes, the Ministry of Education, Culture and Science and the Ministry of Economic Affairs & Climate founded the **Centre of Expertise Leisure, Tourism and Hospitality (CELTH)**. Its goal is to encourage public-private partnerships between universities of applied sciences and industry partners. The joint initiative of the research institutes of Breda University of Applied Sciences, HZ University of Applied Sciences and Stenden University of Applied Sciences developed a sustainable research agenda to translate the "Perspective 2030" for destination the Netherlands into action. They

follow a trans-sectional approach including stakeholder engagement, diverse environmental impacts, sustainable growth paradigm and digitalisation.

The three partners bring different expertise and specialisations to CELTH. BUas offers sustainable tourism education on academic and professional Bachelor and Master level. Their research **Centre for Sustainability, Tourism and Transport (CSTT)** incorporates five main themes, namely climate change & tourism, CSR, sustainable tourist behaviour, geography of tourism and transport, and methods and tools. Stenden University of Applied Sciences offers tourism bachelor programmes. Their research centre **European Tourism Futures Institute (ETFI)** focuses on resilience research using scenario planning and a sustainable innovation approach in regional economies. The HZ University of Applied Sciences has no dedicated sustainability track, but engages in projects with a strong sustainability relation, for example the Interreg 2 Seas circular economy project **FACET** (Facilitating the introduction of circular entrepreneurship in the tourism & recreation sector). Beyond they host the **Knowledge Network Destination Netherlands** which aims to future-oriented destination development and is based on the sustainable paradigm.

Since recently, the **InHolland University of Applied Sciences** offers a special programme called New Urban Tourism that includes research and living labs in Amsterdam and Rotterdam on urban tourism challenges.

Wageningen University and Research (WUR) engages in research on nature-based tourism and ecotourism, tourism and climate change and tourism experiences. They offer English-speaking sustainable tourism education on MSc level as well as a BSc programme in cooperation with BUas. Beyond, through online education and certification they have a high international reach in sustainable tourism education.

Other tourism programmes without direct reference to sustainable development are offered by the Saxion University of Applied Sciences and LOI (Leidse Onderwijsinstellingen, a commercial institute that offers both distance and classical education).

4.13.2.5 Individual tourism business and destinations of particular relevance

There are many great initiatives for sustainable tourism. The few listed have long established sustainability strategies and are therefore role models for the Dutch tourism industry.

One of the leading actors in developing and applying an overall sustainable strategy is **TUI Benelux.** TUI has an extensive sustainability strategy and reports on sustainability key performance indicators (KPIs) on a regular basis. With the TUI Care Foundation, they aim to enhance the positive impacts of tourism in destinations though selected sustainable development projects.

Regarding over-tourism, **Amsterdam Marketing** is a frontrunner. With their Vision 2025 on redesigning the visitor economy in Amsterdam, they set opportunities to research and develop sustainable growth and tourist steering based on data insights. On a provincial level, municipalities such as **Schiermonnikoog, Texel and Terschelling** (all three Wadden Sea islands) have cooperated with universities and research institutes (e.g. WUR) to determine the status quo and options for more sustainable tourism development.

Regarding nature tourism, **Natuurtransferiums** (natural area transfer locations) present a low-emission tourism concept. Just like the ones located at city edges, these are locations where visitors arrive with and park their car and transfer to another, more sustainable mode (like walking or cycling). Natuurtransferiums are located at natural destinations in the Netherlands that are closed for cars, or where the aim is to reduce car traffic.

Regarding sustainable destination development, the **municipality Schouwen-Duiveland** is a role model. It is actively committed to sustainable tourism, environmental care, nature conservation and heritage. For this purpose, it has been awarded with five sustainable tourism awards and labels, namely Green Destination Certified, QualityCoast Award, Best Seaside 2018, BlueFlag and GreenKey for 11 accommodations (see below for more details on awards and labels).

Regarding sustainable accommodations and holiday parks, the **Landal GreenParks** are a role model. They aim that each stay has a positive impact on nature and people. The parks are designed for guests to experience and support conservation practices and local businesses. In 2013, Landal GreenParks pledged to become climate neutral. Therefore, they invest in circular sourcing and practices, for example though the use of recycled resources. Landal GreenParks is to be taken over by **Roompot**, another large holiday park company. Their combined 300 parks are located throughout Europe, and Roompot is eager to apply Landal's sustainability knowledge and targets to its organisation.

4.13.3 Activities and instruments for the development of sustainable tourism

4.13.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Next to various sustainable tourism initiatives within organisations, there are several bigger projects that combine actors from the tourism industry, governments and knowledge institutes.

Research Agenda for making the tourism sector more sustainable: CELTH is the Dutch Centre of Expertise within the domain of leisure, tourism and hospitality. The knowledge centre was set up by Breda University of Applied Sciences, NHL Stenden University and HZ University of Applied Sciences. Other institutes and universities outside and inside the hospitality sector are also involved in tourism research on a project basis. CELTH's research agenda on sustainable tourism development is based on the National Agenda "Perspective Destination The Netherlands 2030" and aims to build responsible destinations, initiate sustainable growth and digitise the tourism industry. On project level, they cooperate with stakeholders from the relevant sector and governmental organisations. Projects include building predictive models for insight into tourism pressures, mapping the societal value of tourism and recreation (see next), developing the Dashboard 'the State of destination The Netherlands', and many more.

Societal Value of Tourism and Recreation: Gastvrij Nederland and CELTH composed a report on the value of tourism for the Netherlands (Klijs et al., 2021). In the future research institutes, governments and stakeholders want to work closer together to increase the social benefits of tourism and recreation.

Smart Assessment Sustainable Tourist Destinations (SASTDes): The project SASTDes aims to resolve key issues in the sustainability assessment process of tourism destinations. The project is funded by SIA-RAAK (Foundation of Innovation Coalition for Regional Attention and Action for Knowledge circulation). The project is conducted by knowledge institutes and representatives from the tourism sector.

Smart Cultural Tourism (SmartCulTour): SmartCulTour is a four-year project, funded by the European Union in the frame of Horizon 2020, in which smart cultural tourism is developed as a driver of sustainable development of European regions. The goal of SmartCulTour is to support regional development in all European regions with important tangible and intangible cultural assets, including those located in rural peripheries and the urban fringe, through sustainable cultural tourism. BUAS is the Dutch partner of the project.

Tourban: Tourban is an EU-funded project that supports urban tourism SME's in becoming more competitive and sustainable from an economic, environmental and social perspective. It provides skills trainings, networking and financial resources for innovation and sustainability. The aim is to reduce costs and resource consumption, increase revenue through positioning and improved visibility. Amsterdam is one of the seven European cities in the project.

4.13.3.2 Marketing and information services supporting sustainability in tourism

A comprehensive overview of the complete Dutch tourism industry is given in the **Trend Report for Tourism, Recreation and Leisure** (*Trendrapport toerisme, recreatie en vrije tijd*) which is published by the Dutch Research Institute for Recreation and Tourism **(**NRIT) and Statistics Netherlands (CBS) on an annual basis. It consists of three parts, of which the first summarizes demographic, economic, socio-cultural, technological, sustainable and policy trends, the second shows all the relevant tourism statistics for the previous year, including a chapter on emissions and visitor pressure, and the third presents the situation of the most important domains in tourism and recreation. The report is considered as a handbook for all tourism and recreation businesses interested in marketing and development.

Where NBTC previously mainly presented marketing data on inbound tourism, the development of a national data alliance for better insights on visitor behaviour and sustainability under the new Perspective 2030 policy resulted in a **Dashboard** on 'the state of destination Netherlands' (NBTC, 2021). The dashboard is still being further developed, but already includes some data on sustainability-related topics like seasonality and visitor pressure (overnights-intensity).

The Centre for Sustainability, Tourism and Transport (CSTT) of BUas Breda University of Applied Sciences publishes on the **carbon footprint (CF) of Dutch holidaymakers** since 2008 on an annual basis and provides a series from 2002 to 2020. Next to the annual report on the CF of domestic and outbound holidays (latest: Eijgelaar et al., 2021), the CF of inbound (Neelis, Pels, et al., 2020) and Dutch business travellers (Neelis, Peeters, et al., 2020) have received attention.

The **Dutch Research Institute for Recreation and Tourism (NRIT)** is a Dutch knowledge platform for the leisure sector with various printed and digital media information services.

Several titles, such as Recreation & Tourism, Trend Report Tourism, Recreation & Leisure and NRIT Current and Leisure Studies are part of NRIT, in which is also reported on sustainability developments in the Dutch tourism sector. Beyond, NRIT hosts conferences, seminars and courses in current tourism-relevant topics, including sustainability.

4.13.3.3 Tourism Sustainability Certification Systems and Awards

There are several certification systems and awards organizations based in the Netherlands. They certify Dutch businesses and destinations as well as destinations abroad.

Some certification systems are managed by well-known NGOs and Networks in the Netherlands. ECEAT manages **Travelife for Tour Operators and Travel Agents**, with which 29 companies in the Netherlands have been certified, and 54 are partner. Travelife is a system that helps tour operators and travel agencies to manage and improve social and environmental impacts by complying with sustainability criteria. Green Destinations manages **Green Destinations Certified** and **Quality Coast**. GreenDestinations offers tools and a GSTC-recognised framework for sustainable tourism development. Green Destinations Awards recognise progress in sustainable destination management, policies, and political leadership. QualityCoast Awards are specially designed for destinations focusing on waterfront sustainability, seaside, and beach quality. Green Destinations Certification is the recognition for ambitious destinations aiming for full compliance with the globally agreed sustainability standards, assessed with an evaluation process accredited by GSTC. In the Netherlands, to date 11 destinations have received a QualityCoast or Green Destination award.

Beyond the above there are several domain specific awards and/or labels that are of high relevance in the Dutch tourism industry.

The **Green Key Award** has been given to many Dutch tourism businesses (some 700). The **Green Key** programme is overseen by the Danish Foundation for Environmental Education (FEE) and managed in the Netherlands by the Environment, Safety and Quality Hallmark Foundation (Stichting KMVK). It is one of the leading labels for environmental responsibility and sustainable operation within the tourism industry with considerate recognition in the Netherlands. Its criteria have been linked to the SDGs (FEE, 2016). It has different sets of criteria for Event and congress locations, Bungalow parks, Day attractions, Hotels, Camping sites, Small accommodations, and Restaurants. A second, new sustainability hallmark managed by KMVK is **Duurzaam Gastvrij** (Hospitable Sustainably), which is for a number of business categories in the leisure arena in the widest sense: wellness & sauna, libraries, floating locations & passenger boat operators, and swim and indoor-sports locations. Although officially started in 2021 it already has a number of certified businesses. KMVK also manages the **Blue Flag Award** (*Blauwe Flag*). This is annually awarded to beach and marina areas in recognition of their efforts in sustainability management, safety, water quality, awareness raising, education and waste prevention and sorting. In 2021, 183 blue flags were awarded to 127 Marinas, 39 beaches and 7 recreational beaches in the Netherlands.

The **Green Dome** (*De Groene Koepel*) was founded in 2014 as a merger between Natuurkampeerterrein (Nature Camping Sites) and **Trekkershutten** (Hiker Cabins). Their label **Natuurkampeerterrein** is awarded when recognition, design and management of the park

meet their guidelines and checked at least every three years by the KMVK. There are 134 Nature Camping Sites in the Netherlands, all small-scale and as natural as possible. Hiker Cabins do not have to meet specific sustainability criteria, but often do due to their location in natural areas. There are some 750 Hiker Cabins on 250 different locations in the Netherlands.

4.13.4 Summary and conclusion on national situation

4.13.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The Perspective 2030 manifests the ideal pathway of the Dutch tourism industry's development. While the plan is based on a macro level and portrays clear demands to policy makers and destination management organizations, little explicit attention is paid to tourism businesses so far. SME's may profit from the new public-private financing constructions and the data available to them via the national data alliance. In the implementation of Perspective 2030, clear benefits for SME's should be defined.

Over the past years, Dutch tourism SME's have increasingly been going green. The reasons are varied, from intrinsic values to economic reasons, to following consumer demand and trends in the Dutch tourism industry. A large number of SME's is now sustainability certified through a range of labels.

4.13.4.2 Challenges for the development of sustainable tourism and for SMEs

Sustainable tourism has become a tourism trend during the last decade. While this development is very positive, it also entails a marketing boost related to sustainability which softens the approach. Real sustainability in tourism can only be achieved if the term is better defined by policy makers. Another challenge to sustainable development is the low capacity to monitor the state and progress of sustainable development making more an aspiration than a key performance indicator. Beyond, over tourism poses a problem for sustainable tourism destinations. The more tourists are attracted by sustainable offers, the more difficult it is to keep tourism growing at a healthy pace. For example, during the COVID-19 pandemic nature areas have been overcrowded. Concepts for sustainable growth of tourism destinations and thresholds need to be determined to ensure a real sustainable tourism development.

SME's are marginalized in tourism projects regarding the future of tourism. This is mainly due to low financial resources and limited scope of implementation. There are several concepts that describe the pathways to sustainable tourism in the Netherlands on a macro level. As a next step, these ambitions have to be translated to SME's and other tourism businesses.

4.13.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

After Slovenia, Malta and Cyprus, the Netherlands showed the smallest decrease in domestic tourism overnights (-10%) in the EU in 2020 compared to 2019. For non-resident overnights, the decrease was also below the EU-average (Eurostat, 2021). Research by Breda University of Applied Sciences (to be published late 2021) shows that the total CO_2 emissions of all Dutch holidays almost halved in 2020 in comparison to 2019. This is due to a near halving (-48%) of

outbound holidays, a 58% decrease in holidays by plane, and a consequent 52% lower total travel distance. Yet, the number of domestic holidays only decreased by 4%. To some extent, this illustrates the resilience of domestic tourism to crises and its potential in contributing to a more sustainable tourism development. Still, many tourism and recreation SME's have suffered great financial setbacks during the lockdowns.

The Taskforce Hospitality Sector determined four main field of action for a sustainable tourism recovery (Keijzer, 2021):

- To prioritize the domestic market, and next to this, the Belgian and German market.
- To monitor the travel sentiment in the key markets for the Netherlands: domestic, Germany, Belgium, UK and France.
- To aid destinations with digital innovations and technological development, and with creating digital, small-scale and rural experiences.
- Campaign 'This is where you should be' to stimulate (short) domestic holidays.

While this is a good start, the focus of these actions is more on the resilience of nearby and domestic tourism, than on actual investments or actions towards greater sustainability. The greatest post-COVID challenge is thus to keep going greener, whilst endeavoring for economic survival.

4.13.4.4 Recommendations for boosting Sustainable Tourism for SMEs

Finally, based on the analysis, a number of recommendations for removing barriers to sustainable development for SME's and/or boosting sustainable tourism can be given:

- Integrate SME's in major projects between industry, governments and research
- Enable financial support for SME's with ambitious sustainability projects by governmental bodies
- Include sustainability requirements in post-COVID subsidies and policies
- Ensure SME's accessibility to information at a low cost (therefore remove barriers to sustainable development)

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4.14 Poland

Krzysztof Szpara
(As of July 2021)

4.14.1 Political framework for Sustainable Tourism

4.14.1.1 National Sustainable Tourism Policies and Strategies

The basis for the sustainable development of tourism in Poland is a common policy, the main goal of which is sustainable economic, social and environmental development. There are no direct references to sustainable development within the framework of the tasks carried out by the ministerial **Department of Tourism** (*Departament Turystyki*), although such a relationship sometimes occurs indirectly. Similarly, the current legislation directly related to tourism (the Act on package travel and related tourist services, and the Act on hotel services and the services of tour leaders and tourist guides) also does not refer directly to sustainable development (Kapera, 2018).

On the other hand, the **Tourism Development Program until 2020** (*Program rozwoju turystyki do 2020 roku*) adopted by the ministry in 2015 had the intention of "strengthening competitive and innovative tourism by supporting enterprises, organizations and institutions as well as initiatives of the tourism sector while respecting the principles of sustainable development". It is also worth citing the **Act on the provision of information on the environment and its protection, public participation in environmental protection and on environmental impact assessments**, of October 3, 2008 (*Ustawa z dnia 3 października 2008 r. o udostępnianiu informacji o środowisku i jego ochronie, udziale społeczeństwa w ochronie środowiska oraz o ocenach oddziaływania na środowisko*). The provisions contained therein strongly linked tourism with sustainable development. The Marketing Strategy of Poland (*Marketingowa Strategia Polski*) in the tourism sector for 2012–2020 was an important tool in the conduct of activities by the **Polish Tourist Organization** (*Polska Orgnizacja Turystyczna*). It contains references to global trends in tourism, including sustainable development. However, it lacked a comprehensive approach to the issues of sustainable development (Kapera, 2018).

One of the basic documents determining the directions of changes in the field of the economy is **Poland's Sustainable Development Strategy until 2025** (*Strategia zrównoważonego rozwoju Polski do 2025 r.*). It includes, for example, the legal basis and recommended actions in the social, economic and environmental areas. It also indicates key stakeholders and instruments for implementing sustainable development. There are also other documents that refer directly to the sustainable development of tourism. They differ in scope, role and importance. Two examples are shown below.

Protocol on Sustainable Tourism to the Framework Convention on the Protection and Sustainable Development of the Carpathians (*Protokół o zrównoważonej turystyce do Ramowej Konwencji o ochronie i zrównoważonym rozwoju Karpat*) is an implementing document to the Carpathian Convention, which aims to ensure the sustainable development of the Carpathian regions of seven countries: Czech Republic, Poland, Romania, Serbia, Slovakia,

Ukraine and Hungary. The aim of the protocol is to strengthen and facilitate cooperation between the parties to develop sustainable tourism in the Carpathians, for the benefit of present and future generations, in order to maximize the benefits of tourism and economic development, as well as the benefits of tourism, while reducing the negative ecological, environmental and socio- economic impact of tourism. The protocol regulates the general obligations concerning the planning, development, and management of sustainable tourism in the Carpathians. It also applies to many special operations (Ministry of Sport and Tourism, n.d.).

Strategic documents concerning the sustainable tourism development may also be of a regional nature. A **Strategy for the sustainable development of tourism in the Magical Land of the Lemkos and Pogórzans for 2015-2020** (*Strategia zrównoważonego rozwoju turystyki Magicznej Krainy Łemków i Pogórzan na lata 2015-2020*) was developed for a large part of the Low Beskids and the adjacent foothills (38 communes with a total area of 3,550 km^2). Its aim was to set directions for the development of sustainable tourism - an important form of economic activity in these areas, valuable in terms of nature, landscape and culture. The strategy outlines many issues, including:

- defining joint activities and directions of cooperation,
- creating the image of this place as an attractive tourist region, where people live in harmony with the surrounding nature and respect for cultural heritage,
- showing good conditions for recreation and practicing many forms of tourism,
- initiate activities aimed at strengthening the local potential in the field of managing the sustainable development of tourism, which ultimately is to increase the level and quality of life of the inhabitants of this region (Zawilińska et al., 2016).

4.14.2 Key Stakeholders

4.14.2.1 Governmental and semi-governmental bodies

There is a long list of key stakeholders influencing, participating in and benefiting from efforts to develop sustainable tourism. They are both governmental and non-governmental institutions. They can be representatives of the government (especially ministries responsible for the economy, the natural environment and tourism) and members of parliament - the legislative body that decides on the shape of the laws. In the structure of ministries in Poland in 2021, the **Department of Tourism** (*Departament Turystyki*) falls under the **Ministry of Economic Development and Technology** (*Ministerstwo Rozwoju i Technologii*). The department is responsible for programming the development and shaping the legal and economic mechanisms of tourism. In addition, it sets directions and priorities and supervises the implementation of tasks in the field of tourism promotion on the domestic and foreign market. Among the tasks carried out by the Department, the sustainable development of tourism was not directly indicated (Department of Tourism, n.d.).

The group of semi-governmental bodies includes e.g. institutions managing natural values (e.g. national parks), institutions working to improve the condition of the environment and sustainable management of its resources. Three examples are presented below: national

parks, **National Fund for Environmental Protection and Water Management** (*Narodowy Fundusz Ochrony Środowiska i Gospodarki Wodnej*) and **State Forests** (*Lasy Państwowe*).

So far, 23 national parks with a total area of 3,168.2 km^2 have been established in Poland. It is only about 1% of the country's area. The largest of them is the Biebrza National Park (592.23 km^2), and the smallest is the Ojców National Park (21.46 km^2). Their most important function is to protect biodiversity in a given area. In addition, they also perform other functions, including tourism and educational, which perfectly fit into the idea of sustainable tourism development. In national parks, an important role is played by nature museums, educational paths, workshops, trainings and other forms of activity that combine leisure with nature and cultural education. (The National Fund for Environmental Protection and Water Management, 2021)

The **National Fund for Environmental Protection and Water Management** (*Narodowy Fundusz Ochrony Środowiska i Gospodarki Wodnej*) plays an important role in the Polish system of financing environmental protection and water management. It offers loans, grants and other forms of co-financing of projects implemented, among others by local governments, enterprises, public entities, social organizations as well as natural persons (The National Fund for Environmental Protection and Water Management, 2021). The **Fund's operational strategy** does not explicitly mention the development of tourism. However, a number of measures indirectly affect areas that are very important for the sustainable development of tourism, for example: improvement of air quality, waste management, activities for nature protection, improvement of water and sewage management[20].

Poland takes the leading position in Europe as far as the forest area is concerned. The forests overgrow 9.1 million hectares which is 29.4% of the territory of Poland. **State Forests** (*Lasy Państwowe*), in addition to forest management (cutting and planting trees), also make forest areas available for tourism and recreation. Places to relax and light a fire have been prepared, as well as platforms and viewing balconies, tourist trail and educational tracks and other infrastructure. State Forests also conduct educational activities. You can use: 66 forest education centres, 1013 educational paths (didactic), 301 forest education rooms, 545 educational shelters (so called “green classes”), 106 dendrology parks and gardens, 1840 education points, 2676 other facilities. Within the area of the **Promotional Forest Complexes** (*Leśne Kompleksy Promocyjne*) topics related to the forest education are extremely important. There is infrastructure which gives greater opportunities to discover the beauty of forests. One-third of people, who make use of SF's educational offer, visits the Promotional Forest Complexes (State Forests, 2021).

4.14.2.2 Tourism Associations

Among the many organizations (associations) with a tourism profile, the most important is the **Polish Tourism and Sightseeing Society** (*Polskie Towarzystwo Turystyczno-Krajoznawcze*) - the oldest association of tourists in Poland. It develops and promotes sightseeing and specialized active tourism in all its forms. It creates conditions that make it easier for tourists to travel

[20] Wspólna Strategia Działania Narodowego Funduszu i wojewódzkich funduszy ochrony środowiska i gospodarki wodnej na lata 2021-2024, 2020, Narodowy Fundusz Ochrony Środowiska i Gospodarki Wodnej, Warszawa, https://www.gov.pl/web/nfosigw/dokumenty-programowe

around the country and abroad. The society has almost 70,000 members. Its most important task is to mark and protect tourist routes. Almost 70,000 kilometers of trails marked by the Society run through the most attractive areas in Poland. It also /operates tourist facilities with about 20,000 beds, including mountain shelters. The Polish Tourism and Sightseeing Society has introduced a sightseeing tourism programme related to getting to know the homeland, protection of nature, landscape and monuments. It created and promoted a system of badges to develop interest in various forms of tourism and sightseeing (Polish Tourism Sightseeing Society, 2021).

Tourists and representatives of the tourism industry can associate in many other organizations. One of them is the **Association of Tourist Guides "Karpaty"** (*Stowarzyszenie Przewodników Turystycznych „Karpaty"*), which brings together tourist guides, especially mountain guides of the Beskids. The aim of the Association is, for example, improving the skills of associated guides, increasing the guide classes, and issuing internal training materials. The guides also promote the region of south-eastern Poland as an attractive holiday destination. The action also includes the integration of the guide, tourist and economic environment, local government units, as well as people, institutions and organizations interested in the development of tourism in the Podkarpackie Province and the promotion of its sightseeing values (Association of Tourist Guides "Karpaty", 2021).

4.14.2.3 NGOs, Sustainable Tourism Networks and Partnerships

NGOs play a very important role in the development of sustainable tourism in Poland. The effects of their activities are very interesting, appreciated by both tourists and specialists, and awarded in competitions. Examples of entities operating in support of sustainable tourism development are presented below.

The **Association for Development and Promotion of Podkarpacie "ProCarpathia"** (*Stowarzyszenie na Rzecz Rozwoju i Promocji Podkarpacia "ProCarpathia"*) has been operating since 2004. It is engaged primarily with obtaining EU subsidies, management and accounting of projects co-financed from external funding. As a business support organization, it elaborates development strategies, feasibility studies, marketing audits, analyzes, as well as other documents. The Association also deals with publishing, promotion and research. The Association from the very beginning has been developing and implementing projects. They are carried out in partnerships with NGOs, universities, local government units, cultural institutions and other entities. The international projects were undertaken in cooperation with institutions from Ukraine, Slovakia, Hungary, Norway, Italy, Czech Republic, Slovenia and Switzerland. The most important achievements are the establishment of the Carpathian Tourism Cluster, Cluster Subcarpathian Flavours, Subcarpathian Tastes Culinary Trail, The Wallachian Culture Trail, The Carpathian Wine Trail (ProCarpathia, 2021).

The aim of the **Ecopsychology Society** (*Stowarzyszenia Ekopsychologia*)[21] is to initiate, implement and promote activities for the protection of natural and cultural heritage and to build social responsibility for this heritage. Particular attention is paid to shaping the attitudes

[21] Ecopsychology Society (*Stowarzyszenia Ekopsychologia*), https://ekopsychologia.pl/

of the activity and development of civil society. It is implemented, inter alia, by carrying out activities aimed at implementing the provisions of the Framework Convention on the Protection and Sustainable Development of the Carpathians (Carpathian Convention) and by initiating and supporting the public participation of various stakeholder groups in its implementation. The association has extensive experience in the implementation of sustainable development projects, including: Centralparks - Strengthening the management capacity of Carpathian protected areas for the integration and harmonization of biodiversity conservation and local socio-economic development", "Carpathian Space – Spatial planning as a tool for nature protection in the Carpathians", "Carpathians Unite – mechanism of consultation and cooperation for implementation of the Carpathian Convention", "Innovation in Rural Tourism – InRuTou", "Supporting the sustainable development of the Carpathians through environmentally friendly tourism"(Ochwat-Marcinkiewicz, 2021)[22].

The mission of the **Bieszczadzka Foundation** (*Fundacja Bieszczadzka*) is to integrate and support the activities of non-governmental organizations, local government institutions and local entrepreneurs for the sustainable development of the Bieszczady Mountains, as well as to support the development of rural areas and the activation of the local population. The implemented activities are related to, among others, social and economic development, entrepreneurship, culture, art, protection of cultural goods and national heritage, ecology and protection of natural heritage, as well as tourism and sightseeing. Among the many implemented activities, it is worth mentioning: the International (PL-SK-UA) bicycle trail of natural and cultural heritage "Green Bike" - Greenway Eastern Carpathians; creation of Carpathian eco-museums; "Czatownia" Bistro Café - creation of a restaurant promoting culinary and other local and regional products; creation of the GoToCarpathia certification system - an award for high-quality ecotourism products and services related to the Eastern Carpathians. (FB, 2021) The Foundation has been awarded many times for its activities. Among other things, the prestigious Central European Heritage Award for the creation of the Eco-museum "Three Cultures" in Lutowiska (Pyzocha, 2021)[23].

4.14.2.4 Relevant research and educational bodies

There are over 400 public and private universities in Poland (Ministry of Education and Science, 2021)[24]. Some of them provide education in tourism-related faculties and conduct research. The group of the most important universities operating in this area includes, for example: **Institute of Urban Geography**, **Tourism Studies and Geoinformation – University of Lodz** (*Instytut Geografii Miast, Turyzmu i Geoinformacji – Uniwersytet Łódzki*), **Institute of Geography and Spatial Management – Jagiellonian University in Kraków** (*Instytut Geografii i Gospodarki Przestrzennej – Uniwersytet Jagielloński w Krakowie*), **Management Institute - Cracow University of Economics** (*Instytut Zarządzania - Uniwersytet Ekonomiczny w*

[22] Based on an interview with Ms Monika Ochwat-Marcinkiewicz - President of the Board of the Ecopsychology Society

[23] Based on an interview with Mr. Bogusław Pyzocha - President of the Board of the Bieszczadzka Foundation

[24] Website of the Republic of Poland - Ministry of Education and Science (*Serwis Rzeczypospolitej Polskiej – Ministerstwo Edukacji i Nauki*), https://www.gov.pl/web/edukacja-i-nauka/szkolnictwo-wyzsze

Krakowie), **Faculty of Geography and Regional Studies – University of Warsaw** (*Wydział Geografii i Studiów Regionalnych – Uniwersytet Warszawski*), **Faculty of Geographical and Geological Sciences - Adam Mickiewicz University in Poznań** (*Wydział Nauk Geograficznych i Geologicznych – Uniwersytet im. Adama Mickiewicza w Poznaniu*), **Institute of Geography - Pedagogical University of Krakow** (*Instytut Geografii – Uniwersytet Pedagogiczny im. Komisji Edukacji Narodowej w Krakowie*).

Scientists employed there conduct both research and teaching activities. The results of the work are published in scientific journals and in monographs. The best Polish journals in which articles related to tourism and to sustainable tourism development are published are for example: **Folia Turistica**, **Geographical Studies** (*Prace Geograficzne*), **Tourism** (*Turyzm*).

Research in this area is also conducted by employees of the **Polish Academy of Sciences** (*Polska Akademia Nauk*), including in particular the Inst**itute of Geography and Spatial Organization Polish Academy of Science** (*Instytut Geografii i Przestrzennego Zagospodarowania PAN*), which publishes the respected journal **Geographia Polonica**. Members of scientific societies are also very active. A good example is the **Polish Geographical Society** (*Polskie Towarzystwo Geograficzne*), which publishes many interesting scientific journals, including the **Geographical Journal** (*Czasopismo Geograficzne*) and **Dissertations of Cultural Landscape Commission** (*Prace Komisji Krajobrazu Kulturowego*).

Sometimes scientific activity is integrally connected with tourism practice. A very good example is the Seals Centre in Hel on the coast of the Baltic Sea. It is part of the Marine Station belonging to the **Institute of Oceanography of the Gdańsk University** (*Fokarium – Stacja Morska Instytutu Oceanografii Uniwersytetu Gdańskiego*). By conducting research on seals, the Centre in a practical way supports the international action of restoring and protecting the resources of these animals in the Baltic Sea. Seals cured here, similarly to the young born here, are released into the wild (Seals Centre 2021). This place is accessible to tourists. There, they can learn interesting information about the life of these animals and observe their display while feeding the seals with fish, which is a popular tourist attraction.

By 2021, 23 national parks were established in Poland. Their most important function is to protect the unique values of the natural environment. However, other functions are also very important, including research and education. An example of one of the Carpathian parks - the Magura National Park is presented below.

The **Magura National Park (MNP)** (*Magurski Park Narodowy*) is situated in the Beskid Niski Moutnains., in the transitional zone between the Western and Eastern Carpathians, what makes it a crossing of the ecological corridors. In the area of the park the mountain species can meet the lowland species coming into the lowering of the Beskid Niski Mountains. The MNP with its buffer zone is a very interesting area also because of its ethnographic and historical values, e.g., wooden Greek Catholic churches, original Lemko (Ruthenian highlanders) cottages, old cemeteries in the former villages and military cemeteries from World War I. In the Magura National Park, tourists can take part in many activities related to nature tourism. They can walk along the hiking trails, use nature paths or visit the Educational Centre with Museum. In the Educational Centre there is a permanent exhibition presenting the

natural values of the park. Many interesting multimedia solutions were used there (Magura National Park, 2021).

4.14.2.5 Individual tourism business and destinations of particular relevance

The **Museum of Folk Architecture in Sanok** (*Muzeum Budownictwa Ludowego w Sanoku*) includes an extensive ethnographic park. There are about 150 objects – historic secular and religious buildings. Over 31,000 exhibits have been collected there. Much is presented at exhibitions. Particularly interesting and valuable are the exhibitions dedicated to the ethnographic groups of the Ruthenian highlanders – the Lemkos and the Boykos (Museum of Folk and Architecture, 2021).

In the **Bieszczady School of Crafts** (*Bieszczadzka Szkoła Rzemiosła*) you can actively participate in the workshops of disappearing professions. In the School you can make a pot yourself, learn the art of calligraphy, and bake traditional proziaki. The workshops are conducted in the former school in Uherce Mineralne, dating from the beginning of the 20th century. The process of getting to know old crafts is supported by modern audiovisual means. The multimedia presentation can bring you closer to the knowledge of ancient crafts characteristic of this region. Then each participant goes to the office, bakery, calligraphy class and pottery workshop where he will do the work on his own. You can also buy local souvenirs here. They are exclusively products of local artists and craftsmen (Bieszczady School of Crafts, 2021).

Solutions that fit into the idea of environmental protection and sustainable tourism development have been appearing in the hotel industry for years. In 2010, the first ecological hostel in Poland - Wilson Hostel - was opened in Warsaw. It was used, inter alia, heating methods based on renewable energy sources. Among the many interesting solutions, solar collectors, a condensing boiler, mechanisms of heat recovery from used water, waste segregation, composting, an air humidification system based on natural vegetation were used (Ecohotel Warsaw, 2021).

The ecological trend in Poland is developing more and more intensively. In recent years, the number of entities that invest in this type of solutions has increased. Some examples are shown below. The Eco Tatry Hotel in Podhale Region operates on the basis of four pillars: nature, ecology, silence and health. It uses solar energy, and local culinary products are used in the hotel's kitchen. The Ramka Hotel in Poznań uses triple-layer glass, which reduces energy losses. Energy is obtained from solar collectors and photovoltaic panels. This makes it possible to charge electric cars free of charge. The Arłamów Hotel in the Podkarpackie Province has its own heat and power plant and charging stations for electric cars. Moreover, plastic packaging has been completely eliminated there. The Uroczysko 7 Stawów Hotel in Lower Silesia Region uses a heat pump, a biological sewage treatment plant and a "gray water system" - a system for more efficient use of water. In addition, herbs and vegetables are grown there, which are used in the hotel's kitchen. In the Uniejów hotel in the Lodzkie Province, solar collectors are used to generate energy, and the water is naturally softened, which allows you to use much less detergents. Waste segregation is obligatory here, and the hotel's kitchen uses products only from local suppliers (Frankowska, 2020).

Among other pro-environmental activities used in the Polish hotel industry, we can also mention the educational campaign "Hotel without plastic" conducted by the Chamber of Commerce of the Polish Hotel Industry, promoting 30 methods of reducing plastic waste. Interesting solutions and ideas include not using small plastic cosmetics packaging and replacing them with large dispensers, rewarding hotel guests with a drink for not replacing bedding or towels, generating electricity from biomass, using hotel electric vehicles, minimizing light pollution in areas of special natural value, rainwater recovery (Straus, 2020).

4.14.3 Activities and instruments for the development of sustainable tourism

4.14.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

In Poland or on the border with neighboring countries, many valuable initiatives referring to the idea of sustainable tourism development have been implemented. They refer to both the valuable natural values and the cultural heritage of the region. Some examples are given below.

In the Carpathians, the Wallachians made an important contribution to the formation of a cultural community of highlander groups. They have given them a mountain system of pastoral economy, vocabulary, and numerous cultural patterns. The **Wallachian Culture Trail** (*Szlak Kultury Wołoskiej*) is a reconstruction of the traces of Wallachian pastoral activity in the Carpathian Mountains, on the Polish-Slovakian border, where for hundreds of years sheep grazing was a decisive factor in human economy. The objective of the "Wallachian Culture Trail" project was to increase the level of utilization of the potential of the Polish-Slovakian borderland through the Wallachian culture heritage. Traditions related to the Wallachian culture and pastoralism were restoed and tourist products related to it were created. More than 120 elements of small architecture (e.g. Carpathian gates, educational boards, shepherd's shelters) were created. Over 80 folklore events were organized too. They were accompanied by educational activities – shows, lectures, seminars and workshops shoving the daily life of shepherds and pastoral activity (The Wallachian Culture Trail Guide, 2018)[25].

The natural environment and rich cultural traditions are a good base for the development of culinary tourism in the Podkarpackie Province. Local dishes and drinks as well as other food products are popular among both the local community and tourists. Based on this potential, several interesting initiatives have emerged in recent years. One of them is the creation of the **Subcarpathian Tastes Culinary Trail** (*Szlak Kulinarny Podkarpackie Smaki*). It is the only active culinary route in the Podkarpackie Province. It has been operating since 2013. Currently, it associates 51 entities, including 44 restaurants, two vineyards, two confectioneries and three agritourism farms. This is one of the longest culinary routes in Poland. Each of the catering facilities on the trail has at least three regional or traditional dishes on its menu. These objects are assessed in the certification process. The trail promotes exploring the region through its rich culinary traditions and getting to know the region through culinary experiences. In several places on the Podkarpackie Tastes Culinary Trail, you can find a

[25] The Wallachian Culture Trail - Guide, 2018, TURKULA at the request of "Pro Capathia", Rzeszów.

specially prepared and labeled Podkarpackie Tastes Shelf, with regional, traditional and ecological products from local producers (Zielinski, 2021)[26].

One of the most important elements of culinary tourism, also in Poland, especially in its southern part, is enotourism. The tradition of winemaking in this part of the Carpathians dates back to the Middle Ages. The first modern vineyard, called Golesz, was established in 1984. Currently, there are over 150 vineyards in the Podkarpackie Province. It is one of the most important wine centres in Poland. The name **"Carpathian wine trail"** (*Karpacki Szlak Wina*) refers to the tradition of importing Hungarian wine to Poland. It is an agreement of 25 vineyards from Poland and Slovakia. The tourist product is part of the area of cultural tourism – enotourism. It also refers to the idea of slow life (The Carpathian Wine Trail, 2021).

4.14.3.2 Marketing and information services supporting sustainability in tourism

Tourist information and promotion are integral parts of tourism marketing activities. The Polish Tourist Organization is working on the expansion and modernization of the **Polish Tourist Information System** (*Polski System Informacji Turystycznej*). The activities are carried out in close cooperation with the Regional Tourist Organizations, which - in accordance with the assumption of the system - act as regional coordinators of activities. They also apply to sustainable tourism. (Polish Tourist Organisation, 2021) An example is the **"Beautiful East"** campaign, carried out under the project "Promotion of sustainable tourism development in Eastern Poland 2007-2013" (Beautiful East, 2021).

The Polish Tourist Information System consists of two parts: analog (traditional) and digital. Tourist information provided in an analogue form is one that requires contact with another person or the materials they have created. It takes place at tourist information points and tourist information centres and through the tourist marking system. It has the following functions:

- Information - is provided to tourists both by the employees of units providing tourist services, as well as through printed promotional and information materials and road markings
- Promotional - is related to two aspects: creating and maintaining a good image of Poland and individual regions in the country and abroad, and with activities undertaken to increase the effectiveness of selling the tourist offer
- Animation - is carried out by people associated with units providing tourist information services, involved in active enrichment of the tourist offer

The main elements of digital information are:

- National database, the so-called Repository of Tourist Information, which is created jointly by the Polish Tourist Organization and regional organizations;
- **National Tourist Portal** (*Narodowy Portal Turystyczny*) on **www.polska.travel**, which is available in 23 language versions.

[26] Based on an interview with Mr. Krzysztof Zieliński - culinary tourism specialist, regionalist, culinary influencer, co-creator of the Subcarpathian Tastes Culinary Trail (*Szlak Kulinarny Podkarpackie Smaki*)

This system is sometimes complemented by other modern tools.

One of the regional tourist organizations and one of the tourist information centres in Poland are presented below. Both entities are very highly rated by specialists in the tourism industry. It is also important that they are located in one of the most valuable tourist regions in terms of nature and culture. Their activities are often part of the sustainable development of tourism.

One of the 16 regional tourism organizations in Poland is the **Podkarpackie Regional Tourism Board** (*Podkarpacka Regionalna Organizacja Turystyczna*). It has been operating since 2002, on the basis of the Act on the Polish Tourist Organization and the Act on Associations. Its activities are supervised by the minister responsible for tourism. It works as a non-profit association. It is financed by membership fees, subsidies, as well as economic activities (publishing, expert opinions, training, etc.). It also obtains external funds, e.g. from aid programmes and subsidies from public administration budgets. The Podkarpackie Regional Tourist Organization brings together various entities, the Podkarpackie Province, the most attractive tourist cities and communes, universities, associations and companies in the tourism sector, museums and other cultural institutions. (Podkarpackie Regional Tourism Board, 2021)

The Podkarpackie Regional Tourism Board carries out comprehensive activities for the promotion of the region and the development of tourism in the Podkarpackie Province. Its main task is to strengthen the image of the region as an attractive tourist destination, discover and develop new tourism products and expand the tourist information system. Moreover, an important task is to integrate the tourism community through the cooperation of the public sector with the non-public sector of the tourism economy, associations, organizations, and entrepreneurs. The implemented tasks also concern the coordination of activities in the field of planning tourist events, initiating, giving opinions, and supporting plans for the development and modernization of tourist infrastructure, improving the professional qualifications of tourist staff, as well as conducting marketing research, analyzes and monitoring. (Podkarpackie Regional Tourism Board, 2021)

The basic information network consists of tourist information points and centres. One of them is the **Tourist Information Centre in Sanok** (*Centrum Informacji Turystycznej w Sanoku*), one of the best places of this type in the Podkarpackie Province. It has been operating since 1998 and is a unit of the Sanok City Hall. The centre uses Polish, but also supports foreign languages: English, French, Russian, Ukrainian, and Slovak. As part of the tasks performed, a profile on Facebook, instagram is maintained and content related to tourism, history and culture is updated on the website of the Sanok City Hall. The scope of information provided applies not only to the immediate surroundings, but also goes much further (Western Bieszczady, Sanocko-Turczańskie Mountains, eastern part of the Low Beskid, Krośnieńska Basin and the corresponding Carpathian Foothills).

In addition, information is also provided about the neighboring tourist regions of Slovakia and Ukraine. The Centre develops, publishes, and distributes its own publications, including plans and maps, free of charge. It also has advertising and information publications from neighboring IT points. The centre develops, sets out and restores some tourist routes and walking paths. It conducts activities in the field of research and inventory of local natural and cultural values,

including the history of the region. It provides information on accommodation, catering and other services related to tourism in the region. It inspires and conducts activities in the field of tourism promotion of the region, as well as creating unique tourism products. (Bańkosz, 2021)[27] The **Tourist Information Centre** has 4 stars in the certification system of the Polish Tourist Organization, which is the highest possible level.

Both tourists and entrepreneurs benefit from the effects of the work of the Podkarpackie Regional Tourism Board. By promoting the region, it encourages potential tourists to stay in the Podkarpackie Province. Conducting research on tourist traffic and researching the tourist image of the region, he provides knowledge about tourists and potential tourists, which helps to prepare a good tourist offer. The beneficiaries of these activities include tourist SMEs, especially entrepreneurs running accommodation and catering facilities, as well as travel agencies, tourist guides and others. Tourist information centres also play a very important role, where a tourist can, for example, receive professional advice on how to spend your free time. This has a positive effect on the satisfaction with the stay in the region, which has a positive impact on decisions regarding the place of rest in the following seasons.

4.14.3.3 Tourism Sustainability Certification Systems and Awards

Most domestic and foreign certificates in the field of tourism services focus on the functionality of services and do not take into account the importance of employees' competences for the quality of services. The COVID-19 pandemic has stimulated the certification market to ensure sanitary safety for travelers and visitors (Walas, 2020). Some examples are given below.

Tourism entrepreneurs can undergo the certification process and receive the **NEPCon Sustainable Tourism Certification** (*Certyfikacja Zrównoważonej Turystyki*). NEPCon offers certification to hotels, travel agencies and other travel companies. This action aims to improve and promote environmental, social and economic practices. The criteria used in the certification process comply with the standards of the Global Sustainable Tourism Council (GSTC).
One can also take part in the international blue flag project on beaches and yacht harbors. Obtaining the **Blue Flag certificate** is a quality indicator that attracts tourists. It is also a great way to promote environmental issues and raise awareness of ecology. In 2021, 36 bathing areas and marinas were awarded the Blue Flag in Poland (Blue Flag Fundacja dla Edukacji Ekologicznej, 2021).

An example of a good solution on a Polish scale is the competition for **The Best Tourist Product - Certificate of the Polish Tourist Organization** (*Najlepszy Produkt Turystyczny – Certyfikat POT*), which has been organized for several years. It is an activity that aims to stimulate the development of a professional tourist product and to promote it in the country and abroad. The aim of the competition is to select the most attractive, innovative and tourist-friendly tourist products, popularize them and support initiatives resulting in such products.

[27] Based on an interview with Mr. Robert Bańkosz - a Beskid mountain guide, regionalist, chief specialist in tourism at the Tourist Information Centre in Sanok (*Centrum Informacji Turystycznej w Sanoku*)

Certificates of the Polish Tourist Organization are a recommendation and guarantee of services at the highest level (The Best Tourist Product, 2021). For example, one of the winners in 2019 was the UNESCO World Geopark - Muskau Arch - a geological structure unique in the world and the only UNESCO Global Geopark in Poland (Muskau Arch Geopark Association, 2021).

The tourism information certification system is no less important for the quality of the tourism economy. It was introduced in Poland in 2010. **Certification of Tourist Information** (*Certyfikacja Informacji Turystycznej*) is an important element of the quality management policy of the **Polish Tourist Information System** (*Polski System Informacji Turystycznej*) standard. It is implemented by the Polish Tourist Organization. Its goal is (Polish Tourist Organisation, 2021):

- Creating a national network of standardized tourist information units cooperating with each other at local, regional and national levels,
- Providing adequate quality of tourist service by tourist information units,
- Taking initiatives in the creation and dissemination of new tourism products.

Tourist information points and centres are not required to enter the certification process. You can get 1-4 stars, which are awarded for two years. Currently (2021), there are 370 certified tourist information centres and points in Poland. Participation in the certification system brings many benefits, e.g. (Polish Tourist Organisation, 2021):

- Promotion on the websites of the Polish Tourist Organization and in social media
- The opportunity to participate in the Competition for the Best Tourist Information Centre in Poland
- Inclusion in the system of mailing about events, meetings, activities and campaigns of the Polish Tourist Organization
- Possibility of presenting oneself at events organized by the Polish Tourist Organization
- Participation in training for IT staff
- Cooperation in national promotional campaigns.

In order to promote good practices in the scope of running "it" centres and points, the Polish Tourist Organization organizes every year a Competition for the **Best Tourist Information Centre** (*Konkurs na Najlepsze Centrum Informacji Turystycznej*). Its aim is:

- Improving the quality of services provided by tourist information points and centres
- Indication of the best entities that can be a model example for other objects of this type
- Increasing the interest of local authorities in creating and managing tourist information

The competition is open to all certified tourist information centres operating in accordance with the rules and standards of the **Polish Tourist Information System** (*Polski System Informacji Turystycznej*). The following elements are assessed: quality of tourist service, online presence, cooperation for the promotion of tourism or additional services provided. (Polish Tourist Organisation, 2021)

Certification activities are undertaken by various organizations also at the regional and local level. However, some solutions become more important over time, e.g. they may be cross-border. Such a proposal is the **System for Certification of Environmentally Friendly Tourism (ecotourism) Services and Products in the Eastern Carpathians – GoToCarpathia** (*System Certyfikacji Usług i Produktów Turystyki Przyjaznej Środowisku* (*ekoturystycznych*) *w Karpatach Wschodnich - GoToCarpathia*).

It was introduced by the Bieszczadzka Foundation and its project partner from Slovakia in 2009 as part of the project entitled "Tourism without borders - strengthening cross-border cooperation in tourism based on environmental sustainability." The purpose of the certification is to create and promote a regional ecotourism brand common for the Eastern Carpathians under the name GoToCarpathia. The idea takes into account the respect for the historical, cultural and natural distinctiveness of individual subregions, and thus, among others:

- Encouraging the tourism industry to undertake projects in line with the idea of environmentally friendly tourism and using the historical and cultural heritage of the Eastern Carpathians,
- Promoting and improving the standards and quality of ecotourism services and products,
- Strengthening cross-border Polish-Slovak (and ultimately Polish-Slovak-Ukrainian) cooperation for the development of ecotourism in the Eastern Carpathians.

Certificates are awarded in five categories: accommodation services, catering services, educational services (e.g. guide, training, artistic, handicraft), ecotourism product, East Carpathian ecotourism ambassador (honorary category - the certificate is awarded to entities particularly distinguished for the development of ecotourism in the Eastern Carpathians) (Szpara & Pyzocha, 2013).

Tourism enterprises take advantage of the GoToCarpathia certification. As a result, their offer is distinguished from many other offers in this region and promoted. The positive and important thing is that the certificate cannot be purchased. Unfortunately, it is associated with the need to raise funds for the implementation of this type of activity. However, the idea is valuable, and it would be good if it was continued.

4.14.1 Summary and conclusion on national situation

4.14.1.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Tourism in Poland has changed a lot over the last several decades. You can see more and more conscious choices made by tourists. More and more often they ask themselves the question rather not where, but why do they want to go to a given place? What can they see there? What can they experience? They pay attention to the uniqueness, originality, connection with tradition, etc. In response to this, an offer is created that more and more often refers to the natural values and cultural heritage of a given place. A product of this type can also be sold for a higher price. So, it is also a benefit for the local community. There is therefore an interest in

sustainable tourism, both on the demand and supply side. Sustainable tourism records appear in various strategic studies. This issue should be even more visible in this type of documents, and the provisions contained therein should be implemented in tourist regions.

4.14.1.2 Challenges for the development of sustainable tourism and for SMEs

Sustainable tourism is not a separate form of tourism. It is a concept that creates a framework for the development of the various forms of tourism that will be desirable for the sustainable development of a particular area (Niezgoda et al., 2020). It is of particular importance for naturally valuable areas. The most important challenges include the skillful combination of the possibilities and needs of the natural environment, economy and society. Sometimes this can cause conflicts. Solving them is possible on the basis of dialogue, knowledge and environmental awareness of the stakeholders. Therefore, it is particularly important to educate the society from an early age.

The development of sustainable tourism should be visible already at the strategic planning stage. Unfortunately, the research to date shows that the tourism development strategies existing in Poland have many disadvantages, including: they implement the paradigms of sustainable tourism development to a small extent, are rarely consulted with the inhabitants of tourist destination areas, rarely include long-term planning (longer than 15 years) (Nowacki et al., 2017).

Moreover, spatial development plans are often missing, which limits the possibilities of a rational approach to the problem of sustainable tourism development. In 2016, local spatial development plans covered only about 30 percent of the country's territory. In the opinion of the **Supreme Audit Office** (*Najwyższa Izba Kontroli*), such a planning and spatial development system does not ensure rational space management (NIK, 2021)[28].

4.14.1.3 Prospects and challenges with regard to the (post)-COVID-19 situation

The COVID-19 pandemic had a very negative impact on the volume of tourist traffic. However, the behavior of tourists has also changed. After quite a long isolation in their homes, but also out of fear for their safety, people searched for places close to nature and far from large population centres. There was a noticeable decline in participation in mass tourism in favor of intimate trips (Niezgoda et al., 2020). Many people decided to stay in Poland and realize their main holiday rest there, which extended their stays and increased the number of tourists in the most attractive natural places, e.g. in the Bieszczady Mountains. Tourists more often chose accommodation facilities that guaranteed a greater degree of isolation, e.g. agritourism farms and camping houses. They also decided to spend their time implementing various forms of active tourism in the conditions of the natural environment (Szpara et al., 2020). It can therefore be concluded that to some extent the COVID-19 pandemic has in some places fostered the development of sustainable tourism. On the other hand, sometimes naturally valuable areas were overused by tourists, what obviously contradict to the idea of sustainable tourism development.

[28] NIK: Planowanie przestrzenne w Polsce na rażąco niskim poziomie, URBNEWS, http://urbnews.pl/nik-planowanie-przestrzenne/

A separate problem is the economic situation of entrepreneurs from the tourism industry. The government carried out certain activities and legal regulations and prepared support for entrepreneurs, including financial ones. According to specialists and representatives of the tourism industry, the government's decisions were often chaotic, ill-considered, inadequate to the situation and surprising the tourism industry. Help was very often insufficient. This resulted in the functioning of many entrepreneurs in the so-called "tourist underground", where they offered their services discreetly and illegally.

4.14.1.4 Recommendations for boosting Sustainable Tourism for SMEs

The development of sustainable tourism should be supported at all levels of tourism space management and the creation of tourism policy. Cooperation, knowledge, mutual understanding and respect for the arguments of various stakeholder groups are necessary. Conflicts will sometimes be inevitable. It is important that the next step is discussion, arguments, respect for the opponent and an attempt to find a balance between the three pillars of sustainable tourism development.

Often, the activities carried out are preceded by the development of plans and strategies. It is extremely important that they also take into account the needs of the natural environment. Unfortunately, the analyses of the strategies developed so far show that they hardly implement the ideas of sustainable tourism development. Their content was rarely consulted with the inhabitants of tourist reception areas. The attitudes of local communities towards the tourism developed in their vicinity have almost never been analyzed. The tourist absorption capacity of the areas where tourist traffic is concentrated was also not estimated. In addition, little attention has been paid to the impact of tourism on the natural environment (Nowacki et al., 2017). This shows that despite numerous successes, there is still a lot to do in terms of sustainable tourism development in Poland.

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4.15 Portugal

Jorge Matins
(As of December 2021)

4.15.1 Political framework for Sustainable Tourism

4.15.1.1 National Sustainable Tourism Policies and Strategies

Currently, in Portugal, there are national sustainable tourism policies outlined and managed by "Turismo de Portugal (TdP)", the National Tourism Authority, which is part of the "Ministry of Economy and Digital Transition" of the "XXII Government of the Portuguese Republic". The aforementioned policies and strategies are integrated in two major strategic documents for the Tourism sector in Portugal, namely:

The Tourism Strategy 2027 (TdP, 2017)
Resulting from a national debate, reflecting a logic of plural and participative construction aimed at developing a long-term framework for Tourism, also framing the next Community support framework 2021 -2027. In this construction process, public and private agents were involved - companies, institutions, regions, players in sectors complementary to tourism, not forgetting the markets and tour operators, in order to identify priorities and options, promote the integration of sectoral policies that influence the activity of tourism and ensure a stability of tourism public policies up to 2027. Leading the tourism of the future is the motto of this strategy focused on people, which:

- **Defines a vision:** affirming tourism as a hub for economic, social and environmental development throughout the territory, positioning Portugal as one of the most competitive tourist and sustainable destinations in the world
- **Establishes priorities, defining five strategic axes, with the respective lines of action:**
  - enhance the territory
  - boost the economy
  - enhance knowledge
  - generate networks and connectivity
  - project and design Portugal
- **Commits to economic, social and environmental sustainability goals:**
  - **Economic sustainability goals:**
    - Increase demand throughout the territory: 80 million overnight stays
    - grow in value: 26 billion euros in revenue
  - **Social sustainability goals:**
    - Expand tourist activity throughout the year, reaching the seasonality index lowest ever in 2027 (37.5% to 33.5%)
    - Double the level of qualifications in high school and university in tourism (from 30% to 60%)
    - Ensure that tourism has a positive impact on resident populations
  - **Environmental sustainability goals:**

- Ensure that more than 90% of tourism companies adopt efficient energy and water utilization measures and develop environmental waste management actions

- **Focuses on ten strategic assets of national tourism:** people; climate and light; history and culture; sea; nature; water; gastronomy and wines; artistic-cultural, sporting and business events; welbeing; living in Portugal.

The full version of the "Tourism Strategy 2027" document can be consulted by accessing the following link (Portuguese version only).

"+Sustainable Tourism 20-23" (TdP, 2021)

Aligned with the objectives of the "Tourism Strategy 2027" (TdP, 2017) and the post-COVID-19 sector recovery policy, the project is aware of the importance of Portugal strengthening its position and as a sustainable and safe tourist destination, focusing on the circular economy and sustainability environmental. Under the motto "More than a challenge, it is the way" this plan aims to position Portugal as one of the most competitive, safe and sustainable tourist destinations in the world through economic, social and environmental development throughout the territory. The **"+ Sustainable Tourism 20-23"** was structured around 6 guiding principles:

- Focus on the United Nations' 17 sustainable development goals (SDGs)
- Act to minimize the impact of climate changes
- Align with an agenda for the circular economy and promote a climate transition
- Involving sector stakeholders in a joint commitment
- Contribute to achieving the Tourism Strategy 2027 goals

And it will develop under **4 lines of action**:

- **Axis I - Structuring an increasingly sustainable offer – goals:** Ensure that the sector quickly and effectively adopts environmental efficiency measures; Include in public policies for spatial planning and instruments of territorial management, provisions that ensure the sustainability of territories and of tourist uses; Guide the structuring of products and tourism offer through principles of sustainability; Ensure the positive impact of Tourism on communities by reducing regional asymmetries; Ensure the compatibility of different activities with Tourism; Develop solutions oriented to the challenges of sustainability by tourism innovation ecosystem; Research and innovate for the circular economy; Increase digitalization in the activity of companies.
- **Axis II - Qualify the sector's agentes – goals:** Qualify and train young people and professionals for sustainability practices, as agents of change; Ensure the transversal integration of the sustainability pillars in the educational and training projects; Educate for sustainability and the circular economy; Enable companies for the sustainable management of their activity and business; Enable tourist destinations to meet the demands of the planet in terms of sustainability.
- **Axis III - Promote Portugal as a sustainable destination – goals:** Ensure that Portugal is internationally recognized as a sustainable destination; Disseminate the sustainable tourism offer, throughout the territory and throughout the year; Promote sustainable

tourism demand; Promote sustainable tourist mobility in the national territory; Make tourists aware of responsible behavior.

- **Axis IV - Monitor sustainability metrics – goals:** Ensure continuous monitoring of sustainability metrics through a broad and stable framework of indicators; ensure the dissemination of results.

The full document "+Sustainable Tourism 20-23" (TdP, 2021) can be found here (Portuguese version only). To see the video of "+Sustainable Tourism 20-23" (TdP, 2021) follow this link.

4.15.2 Key stakeholders

4.15.2.1 Governmental and semi-governmental bodies

The tourism sector in Portugal is under the "Ministry of Economy and Digital Transition", with a "Secretary of State for Tourism", responsible for defining policies in the area of tourism. "Turismo de Portugal" (TdP) is the "National Tourism Authority", a central technical body within the Ministry of Economy, with jurisdiction over the entire national territory. At a regional level, the main institutional partners operating in the tourism area are the "Regional Coordination and Development Commissions" (CCDR's), the "Regional Tourism Entities" (ERT's), the "Regional Tourism Promotion Agencies" (ARPT's) and the "Municipal Chambers". On the islands of the Azores and Madeira, the tourism area is under the responsibility of the respective Regional Governments: "Regional Secretariat for Economy, Tourism and Culture of Madeira" and "Regional Secretariat for Energy, Environment and Tourism of the Azores".



Figure 16: Portugal Tourism Organization - for external markets and promotion (http://www.turismodeportugal.pt/)



Figure 17: Portugal Tourism Organization – for the national market and promotion (http://www.turismodeportugal.pt/)

4.15.2.2 Tourism Associations

National and regional business associations and other entities in the tourism sector, play a central role in implementing policies, strategies and measures. According to TdP, namely and among many others:

- Portuguese Tourism Confederation (CTP)
- Portugal Hotels Association (AHP)
- Portugal Hotel, Catering and Similar Association (AHRESP)
- Portugal Rural Hotels Association (AHRP)
- Portuguese Association of Travel and Tourism Agencies (APAVT)
- Portuguese Association of Congress, Tourist Entertainment and Events Companies (APECATE)
- Camping and Mountaineering Federation of Portugal
- Association of Hotels and Touristic Enterprises of the Algarve (AHETA)
- Historical Villages of Portugal – Tourism Development Association
- Portuguese Association for Tourism in Rural and Natural Spaces (APTERN)
- Portuguese Association of SPA/Termas
- "Pinus Verde" Association – Slate/Schist Villages
- Portuguese Association for Rural Tourism (PRIVETUR)
- "Casas Brancas" – "Alentejo" and "Costa Vicentina" Quality Tourism Association
- Manor Houses Tourism Association (TURIHAB)
- National Golf Industry Council (CNIG)
- Rural Madeira
- Azorean Houses - Rural Tourism Association
- Tourism 2.1 Forum Association
- Portuguese Association for Sustainable Tourism (APTS)
- "Rota Vicentina" - Association for the Promotion of Nature Tourism on the Alentejo and Vicentina Coast

4.15.2.3 NGOs, Sustainable Tourism Networks and Partnerships

In Portugal, there is a very significant number of NGOs focused on acting in terms of sustainability issues. Among many others without less importance or importance, the following stand out.

League for the Protection of Nature (LPN): among several programs linked to nature conservation and environmental citizenship, it stands out the "Sustainable Castro Verde Program", recognized by UNESCO as a Biosphere Reserve. Their website can be accessed through the following link.

Accessible Portugal: has been developed with the aim of promoting **Accessible Tourism for All in Portugal**. In its current legal status, considered to be the best suited to its objectives, the non-profit private association is an entity at the service of **Qualifying Tourism Supply and Demand,** without neglecting any market segment due to its specific characteristics. In addition to the development of territories that are getting ready to accommodate the diversity of

clients/tourists that the market is available to bring, the quality of life of residents is improved, who also have a variety of needs that must be satisfied. The promotion of **Accessible Tourism** demonstrates a significant relevance. The aging of the world population, particularly in the most relevant outbound markets, together with the consolidated and growing habits of the taste for travel, naturally bring the need to prepare and commit tourist destinations to respond to the corresponding challenges. These challenges are related to quality and safety that customers, increasingly demanding and aware of their rights, value. The **TUR4all** platform is probably the best example of the work developed by **Accessible Portugal**. As an information and dissemination platform for accessible Tourism in Portugal, **TUR4all** helps to capture new segments of demand, improve the tourist experience of people with specific needs, in addition to competing for the design of Portugal as a tourist destination, "Good Welcome", all the people. It is an informative (non-evaluative) instrument, with all the resulting objectivity. TUR4all offers objective information about accommodation, restaurants, recreational activities and the respective accessibility conditions offered, among others, multi-language access (Portuguese, Spanish, French, English, German, Italian and Mandarin), direct interaction with social networks, an active community of users allowing them to comment on the accessibility of all tourist resources and a promotional channel for all accessible tourist establishments and destinations. TUR4all is a solution for tourists, private companies and the public sector, with the promotion of accessible tourism in Portugal, all over the world. Their websites can be accessed through the following links: link 1 and link 2.

Regarding the sustainable tourism networks and partnerships, as well among many others without less importance or importance, the following stand out.

European Blue Flag Association (ABAE) is dedicated to education for sustainable development and the management and recognition of good environmental practices. **ABAE** is part of the **Foundation for Environmental Education (FEE)**, which brings together international entities that together promote **Environmental Education for Sustainability Activities** from more than 60 countries. This association develops several programs, namely the **"Green Key"** program, which is an international award that promotes **Sustainable Tourism in Portugal** through the recognition of tourist establishments, local accommodation, campsites and restaurants that implement good environmental and social practices, that value environmental management in their establishments and that promote Environmental Education for Sustainability. The **Foundation for Environmental Education (FEE) has** the responsibility of this initiative, headquartered in Denmark, coordinated in Portugal by **the Blue Flag Association of Europe (ABAE)** and has the support of several national public and private entities. The goals of the **"Green Key"** program are raise awareness for the adoption of sustainable practices and behaviors among decision makers and participants (companies, authorities, customers, suppliers and local communities) through environmental education for sustainability, reduce the environmental impact of trade, services and restoration activities, promote reduction and efficiency in the consumption of natural resources, facilitate green marketing strategies and recognize environmental management initiatives and contribute to the implementation of Local Agenda 21s through the continuous improvement of organizations. The **ABAE** website can be accessed through the following link.

4.15.2.4 Relevant research and educational bodies

As some of the most relevant research and educational bodies in Portugal, the following stand out:

- **Center for Social Studies (CES)** of the University of Coimbra
- **Interdisciplinary Center for History, Cultures and Societies (CIDEHUS)** of the University of Évora
- **Research Center on Space and Organizations (CIEO)** of the University of Algarve
- **Center for Studies on Socio-Economic Change and the Territory (DINÂMIA'CET-IUL)** of the University Institute of Lisbon (ISCTE)
- **Landscape, Heritage and Territory Laboratory (Lab2PT)** of the University of Minho
- **travelBI** by Turismo de Portugal (TdP)
- **Digital Academy of Turismo de Portugal (TdP)**
- **NeST - Tourism Innovation Center Portugal**
- **Turismo de Portugal (TdP)**
- **Escolas do Turismo de Portugal**
- **Alentejo Sustainable Tourism Observatory (ASTO)**
- **IPDT - Tourism and Consultancy**

4.15.2.5 Individual tourism business and destinations of particular relevance

In Portugal, regarding particularly relevant destinations two stand out.

Açores (Azores): Azores are the first archipelago in the world to achieve international certification of sustainable destination by an entity accredited by the **Global Sustainable Tourism Council.**

In December 2019, the Azores achieved certification as a sustainable tourist destination, by the certifying entity **"Earth Check"** destinations, an achievement that "has reinforced the strategic positioning of the Region, as a destination that combines its stunning nature, the authenticity of the customs and traditions of the population, contributing to the sustainable balance of the region in the economic, social, cultural and environmental pillars, responding to trends current demand for tourism at an international level for non-mass, nature and more sustainable destinations, where an immersive but respectful contact with local communities is provided".

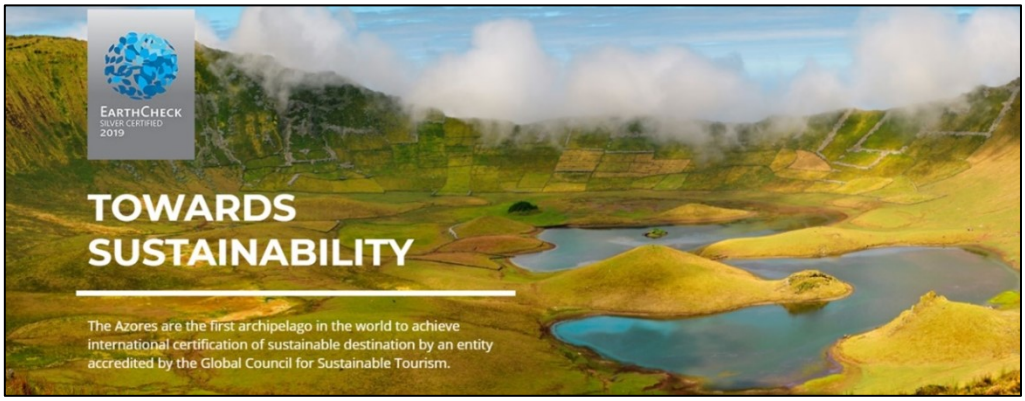

Figure 18: Azores Earth Check Silver Certified 2019 (https://sustainable.azores.gov.pt/en/)

The Azores DMO is the entity responsible for the sustainability management of the Azores Tourist Destination. Under the authority of the Government of the Azores and the Regional Secretariat for Transport, Tourism and Energy, a main function of the DMO is to coordinate efforts and sustainability initiatives acting as a boost for the development of sustainable tourism with partners from the public and private sectors.
The commitment is to ensure that the development of the destination is supported in the sustainable development goals in the context of Agenda 2030 and is applicable to all initiatives and actions of tourism in the Azores.



Figure 19: Azores Key Performance Areas (https://sustainable.azores.gov.pt/en/certification/)

Alentejo: since 2016, this Portuguese destination region has also started the certification process for the entire tourism chain with the project **"Certification of the Alentejo Tourism Sector"**.

The project's mission is to qualify companies in the tourist accommodation subsector for the certification of the Alentejo Destination, increasing the business skills needed to consolidate a sustainable tourism model, by measuring the degree of sustainability of these companies and identifying the applicable legal and organizational requirements that require adjustments to the requirements of the **"Biosphere Responsible Tourism"** benchmark, implemented by the **Biosphere Responsible Tourism Portugal consortium**, an entity that, at national level, represents the **Responsible Tourism System (STR).**

The main goals of this project and certification are: define a strategy and operational model for the certification of Micro and SMEs in the Alentejo tourism sector; select and disseminate a certification model adapted for Micro and SMEs in the Alentejo tourism sector; carry out awareness and information actions on the adopted tourism certification model; encourage applications from Micro and SMEs in the Alentejo tourism sector that include the scope of certification, in particular to the Productive Innovation and Qualification Incentive Systems.

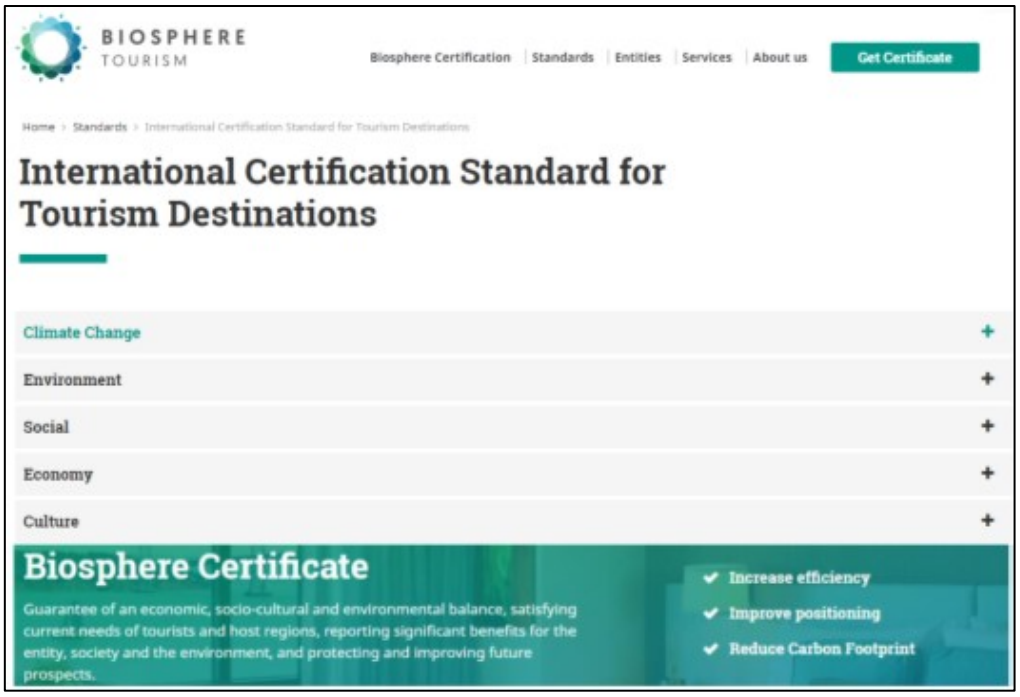

Figure 20: The Biosphere International Tourism Certification Standard for Destinations (https://www.biospheretourism.com)

Regarding the environment pillar, biodiversity is an essential element for the continuity of natural resources that are part of a destination such as Alentejo. Among the actions to be developed in line with the STR requirements are included: environmental impact studies; availability and use of sustainable transportation; management and control of light and noise pollution; waste management and control; reduction of context costs and reduction of CO_2 emissions, by reducing consumption of electricity and gas, but also water through eco-efficiency, renegotiation of contracts with energy suppliers, creation of organic gardens, the reuse of bath and washbasin water and drop-by-drop irrigation system and geothermics for heating over air conditioning. Regarding the economic pillar, the economic development of Alentejo is one of the fundamental aspects of the work developed with the accommodation units. This field includes measures such as: encouragement of hiring local residents; local procurement policy; acquisition of products manufactured and/or produced sustainably. Regarding the social pillar, accommodation should have a role of respect and collaboration with local communities. To this end, measures such as the following have been implemented: development of codes of conduct for activities carried out with local communities, with their consent and collaboration; participation in the social life of the community, working with social events and providing the physical space for social initiatives whenever possible; cooperation with local authorities in projects that promote sustainability, such as Local Agenda 21; collaboration in learning activities with local or regional schools and/or training centres and collaboration in campaigns for social purposes - donation of goods, food banks, social partnerships. Throughout the project, accommodation units are encouraged to involve local communities in good sustainable tourism practices, through various measures, what in the medium term, can positively sensitize citizens to critical issues in the context of sustainable tourism, such as: resource saving; solidarity with the local community; universal accessibility; sense of belonging and welcome and hospitality. Also, in the Portuguese destination region of

Alentejo but now regarding individual tourism business, “Vila Park Nature & Business Hotel” is one of the best and diverse examples of the implementation of sustainability policies and measures. As a 4-star hotel, within the scope of its Environmental Management System, it intends to comply with the commitment to minimizing environmental impacts, promoting continuous process improvement, in order to ensure proper management of natural resources and waste, namely through selective separation and comply with applicable laws, regulations and other requirements, follow the 5 R’s policy as much as possible: **Refuse:** excess or environmentally harmful products as much as possible; **Reflect:** on socio-environmental processes in order to improve the system whenever possible; **Reduce:** create less waste and reduce the amount of disposable packaging; **Reuse:** materials as much as possible; **Recycle:** transform something used and useless into something new and useful), raising awareness of customers and training employees to adopt appropriate behaviors, in terms of socio-environmental behavior and disclosure of the environmental policy among all business partners and the general public, in order to raise awareness and comply with it.



Figure 21: “Vila Park Nature & Business Hotel”(https://www.vilapark.com/)

Among many others, such as “ISSO 14001”, “Carbon Free Program”, “EarthKeepers Program”, “Vila Park Nature & Business Hotel” also holds the following, shown in figure 22.



Figure 22: “Vila Park Nature & Business Hotel” certifications already obtained and implemented (https://www.vilapark.com/ambiente)

4.15.3 Activities and instruments for the development of sustainable tourism

4.15.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

As previously identified and referred to in 4.1.1.1, it will be the responsibility of “Turismo de Portugal” (TdP) ensure the implementation of the “+Sustainable Tourism 20-23” Plan, which includes initiatives and projects to be developed in close articulation with the institutional partners identified, some of which have already been signposted and are under development, and others to be initiated. The aim is to ensure the involvement and commitment of entities

and companies in the tourism sector, academia, as well as other sectors of activity such as the Environment and the Sea.

Table 7: Sustainable Tourism Initiatives, Projects and Campaigns to Structrure Sustainable offer ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

SCOPE	INITIATIVE/PROJECT	PARTNERS	SCHEDULE
Reinforcement of the environmental efficiency in the tourist offer	Revision of the tourism establishments Administrative Decree (mandatory sustainability requirements focusing on water consumption efficiency, energy and waste production)	SECTOR ASSOCIATIONS	2021
	Inclusion of sustainability requirements for new touristic uses in territorial management Instruments	CCDR ICNF APA MUNICIPALITIES	2021-2023
	Inclusion of sustainability criteria for the attribution of financing support in the new financing instruments of Turismo de Portugal	BANKING SECTOR	2021-2023
	Creation of financing instruments for energy efficiency; water and (bio)waste for housing and catering, including implementation of certification	BANKING SECTOR	2021-2023
	Platform "For sustainable tourism" - monitoring of hotel consumption and dissemination of information and good practices for increasingly efficient consumption	AHP	2021
	AQUA+Hotéis - Programme for Water Use Management by Hotels	ADENE SECTOR ASSOCIATIONS	2021
	Guide to Sustainable Construction in Tourist Enterprises (new construction and rehabilitation)	NOVA Hospitality & Tourism Platform ENVIRONMENTAL FUND	2020
Sustainable companies and destinations	Clean & Safe Stamp - promoting tourist confidence in the tourist offer - network of audits and new developments of the platform www.portugalcleanandsafe.pt	SECTOR ASSOCIATIONS MINISTRY OF HEALTH MINISTRY OF CULTURE / IGAC DGAE, IMT/ARAC FCM, CNIG, APECATE REGIONAL TOURISM ENTITIES	
	Clean & Safe Stamp 2.0 - new dimensions for the qualification of the service in the post-COVID period (health safety, well-being, sustainability)	MINISTRY OF HEALTH SECTOR ASSOCIATIONS	2021
	ISO-TC 228 Sustainability: Translation and implementation of the ISO Standard	CT-144 (TOURIST SERVICES)	2021
	Review and Implementation of Portuguese Standards on tourist services already edited	CT-144 (TOURIST SERVICES)	2021
	Provision of technical information on internationally recognized certifications and labels for adoption by companies and destinations	REGIONAL TOURISM ENTITIES SECTOR ASSOCIATIONS CERTIFICATIONS AND LABELS MANAGING ENTITIES	2021-2023
	Training on certification for business and destinations	GSTC	2021
	Sustainability Good Practice Guides for Tourist Entertainment and Events	APECATE	2021
	National Tourism Award - distinction of success cases in typologies: Network Tourism; Authentic Tourism; Sustainable Tourism; Trust Tourism Intelligent Tourism	BPI IMPRESA	2020
Mitigation of climate change	Identification of areas at risk of climate change and definition of mitigation measures for sensitive territories (coastline, inland waters and classified areas)	MINISTRY OF THE SEA MINISTRY OF THE ENVIRONMENT AND CLIMATE ACTION	2021
	Report on Water Efficiency in Golf Courses - survey of the current situation; development of proposals for improvement and framing them within the Regional Water Efficiency Plans	PORTUGUESE GOLF FEDERATION CNIG ENVIRONMENTAL FUND	2020 - 2023
	Provision of information to support tourists and tourism establishments on heat waves	MINISTRY OF HEALTH	2021-2023
Plastic reduction in Tourism	Identification and disposal of single use, problematic or unnecessary plastics in the sector	PORTUGUESE PLASTICS PACT	2020-2023
	Good practice guide for the reduction of single-use plastic in tourist accommodation	TRAVEL WITHOUT PLASTIC ENVIRONMENTAL FUND	2020-2021
	Training of companies for the disposal of single-use plastic	MEMBERS OF THE PACT TRAVEL WITHOUT PLASTIC	2021-2023
Circular Economy	The practices of circular economy in coastal tourist destinations: Guide to Good Environmental Practices for Tourist Accommodation (including specific requirements for tourism establishments in coastal areas and the adoption of the principles of circular economy); addressing the issues of coastal protection, urban clean-up and waste management with coastal municipalities.	AHRESP APA ENVIRONMENTAL FUND	2020

	Guide on carbon neutrality in tourist developments and compensation measures (case study)	NOVA Hospitality & Tourism Platform ENVIRONMENTAL FUND	2020-2021
	Guide of Good Practices for the catering industry, contemplating the good environmental practices of circular economy and implementation of the certified training module on circular economy in Turismo de Portugal Schools	AHRESP ENVIRONMENTAL FUND	2020-2021
	Project "Aproveitar e Alimentar no Turismo" (Reuse and Feed in Tourism) - Fighting Food Waste in Tourism	SECTOR ASSOCIATIONS NATIONAL COMMISSION FOR THE FIGHT AGAINST FOOD WASTE REGIONAL TOURISM ENTITIES	2021-2023
	Gastronomy and Wine SELECTION Programme - implementation of the new Sustainable Gastronomy segment	AHRESP	2020-2023
Sustainable Mobility	Plan to increase train use for tourism mobility in the territory and connectivity with other low carbon mobility services	WORK GROUP WITH CP, IP, MUNICIPALITIES	2021-2023
Accessibility for All	All for All Programme - training plan for companies and entities for accessibility for all	SECTOR ASSOCIATIONS REGIONAL TOURISM ENTITIES	2020-2023
	Inclusion of accessibility criteria for the attribution of financing support in the new financing instruments of Turismo de Portugal	BANKING SECTOR	2021
	Accessible Beaches Programme	INR APA	2020-2023
	Accessible Festivals Programme	INR	2021-2023
Valuation of cultural heritage	REVIVE Programme - Recovery and valuation of architectural heritage of interest, currently totally or partially derelict and degraded for new tourist uses	DGPC DGTF DGRDN MUNICIPALITIES	(2018) - 2023
	REVIVE NATUREZA (REVIVE NATURE) Programme - Recovery and valuation of real estate located in low density territories for new tourist uses	TOURISM FUNDS	(2019) - 2023
	"Dinamizar Fortalezas" (Dynamize Fortresses) Programme - boosting heritage to attract new audiences (focus on interior development and territorial cohesion)	REGIONAL TOURISM ENTITIES MUNICIPALITIES	2020-2023
	Development of tourist products, focusing on the territories' anchor cultural assets and territorial cohesion, in the framework of the Regional Tourism Entities' Action Plans	REGIONAL TOURISM ENTITIES	2021-2023
Valuation of natural heritage	Portuguese Trails - Cycling and Walking "100% Responsible" Programmes (sustainable practices and services developed by partner companies)	SECTOR COMPANIES	2020-2023
	UNESCO Geoparks National Network - development of new tourist offers anchored in the valuation and preservation of endogenous products and the natural heritage of the geoparks network	UNESCO GEOPARKS REGIONAL TOURISM ENTITIES	2020-2023
	Development of a tool for the dissemination of good tourist practices in the Natural Protected Areas	ICNF	2021
	Sustainable motor caravanning Programme - Development of an infrastructure and services national network to support motor caravans; awareness-raising and enforcement to combat illegal parking of motor caravans	REGIONAL TOURISM ENTITIES FPCM ICNF PSP, GNR ANMP AHRESP	2020 - 2022
	Development of tourist products, focusing on the territories' natural anchor assets and territorial cohesion, within the scope of the Regional Tourism Entities' Action Plans	REGIONAL TOURISM ENTITIES	2021-2023
	Guide to good practices in the management of tourist activity on surf spot beaches	TOURIST ENTERTAINMENT WORK GROUP	2020-2021
Valuation of the nautical offer	Guide to Good Sustainability Practices for nautical Infrastructures	MINISTRY OF THE SEA NAUTICAL STATIONS NETWORK	2021
	Training of Marines, Ports, Nautical Stations and Business Managers on Sustainability Practices	MINISTRY OF THE SEA NAUTICAL STATIONS NETWORK	2021-2022
Innovation and sustainability	Inov4Sustainability - Sustainability oriented R&D programme in tourism business	NEST – Tourism Innovation Centre	2021-2022
	Futurlabs4Sustainability - Laboratories for experimentation with ideas and pilot projects in the field of sustainability and accessibility in Tourism	NEST – Tourism Innovation Centre	2020-2021
	Digital tool for self-diagnosis of sustainability, with internationally level scorecard; reports of immediate improvement measures; data management	NEST – Tourism Innovation Centre	2020-2021
	Support to start-ups with sustainability-oriented projects in the framework of the FIT network acceleration programmes	FIT NETWORK	2021

Table 8: Sustainable Tourism Initiatives, Projects and Campaigns to Qualify the Tourism Sector ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

SCOPE	INITIATIVE /PROJECT	PARTNERS	SCHEDULE
Capacity building for sustainability	Densification of training content on sustainability, circular economy and energy efficiency in Turismo de Portugal Schools' courses	SECTOR ASSOCIATIONS	2020-2021
	Development of e-learning contents (MOOC's) sustainability, for autonomous learning	NEST – Tourism Innovation Centre	2020-2021
	Dissemination of good environmental practices in Tourism to Polytechnic Institutes and Professional Schools with Tourism Courses	RIPTUR ANQEP ANESPO	2020-2021
	Project "Educar para um Turismo Sustentável" (Education for a Sustainable Tourism) - Training Programme for Basic and Secondary Schools for Sustainability in Tourism	ANQEP	2020-2021
	BEST Programme - Implementation of a training programme for companies and destinations in the areas of sustainable construction, energy efficiency, efficient use of water, waste production, calculation/compensation of carbon footprint, processing/evaluation of bio-waste	SECTOR ASSOCIATIONS NEST – Tourism Innovation Centre	2021
	Sustainability Training Programme for professionals in active employment	SECTOR ASSOCIATIONS	2021
	Sustainability awareness events		2021-2023
	Sustainability Internal Plan of Turismo de Portugal and its Schools Network		2020-2023
Sustainability in the National Qualifications System	Creation of Short-Term Training Unit for the National Catalogue of Qualifications (transversal to all levels of training and courses)	ANQEP	2021

4.15.3.2 Marketing and information services supporting sustainability in tourism

This is another of the areas and axes of action of the aforementioned and explained "+Sustainable Tourism 20-23" Plan (TdP, 2021), in which the following marketing and information services and measures are contemplated for implementation and operationalization.

Table 9: Promote Portugal as a Sustainable Destination ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

SCOPE	INITIATIVE /PROJECT	PARTNERS	SCHEDULE
Project Portugal as a sustainable destination	Inclusion of messages and content about Portugal as a sustainable tourism destination in communication	REGIONAL TOURISM ENTITIES REGIONAL AGENCIES TOURISM PRODUCTION	2021-2023
	actions aimed at the internal and international markets		
	Inclusion of messages and content on sustainable mobility in Portugal, namely railways, in the communication actions aimed at the internal and international markets	CP	2021-2023
Promotion of the offer throughout the territory and throughout the year	Implementation of communication actions to promote the Interior Regions of Portugal		2020-2023
	Capacity building of the tourist operation in the interior regions of the continent and the ultra-peripheral regions of the Azores and Madeira	REGIONAL TOURISM ENTITIES COLLABORATIVE NETWORKS	2021-2023
	Implementation of communication and marketing plans for tourism products that extend tourism activity all year round	REGIONAL TOURISM ENTITIES REGIONAL AGENCIES TOURISM PRODUCTION	2021
Awareness-raising among tourists	Sustainable motor caravanning - Life Campers initiative	REGIONAL TOURISM ENTITIES FPCM ICNF	2020-2021
	Responsible Tourist - Development and communication of content on good sustainability practices for tourists	REGIONAL TOURISM ENTITIES SECTOR ASSOCIATIONS	2021-2023
Sustainable events	Valuation of good sustainability practices in the criteria for granting financial support to events	REGIONAL TOURISM ENTITIES REGIONAL AGENCIES TOURISM PRODUCTION	2021
	Definition of criteria for the capture of events related to Sustainability	REGIONAL TOURISM ENTITIES REGIONAL AGENCIES TOURISM PRODUCTION CONVENTION BUREAUX	2021
	Planetiers World Gathering - International event: sustainability, entrepreneurship and regional development	PLANETIERS WORLD GATHERING	2020
	Évora Forum - A World For Travel	AWFT	2020

Table 10: Monitor sustainability metrics in the sector (Ibid.)

SCOPE	INITIATIVE /PROJECT	PARTNERS	SCHEDULE
Monitoring of the performance for sustainability in the Tourism sector	Creation of Regional Sustainability Observatories as part of the UNWTO Network of Observatories (INSTO)	REGIONAL TOURISM ENTITIES UNIVERSITIES POLYTECHNICS	(2019) - 2023
	Implementation of the system of sustainability indicators at destination level based on international recommendations of the WTO, European Commission (ETIS) and Global Tourism Sustainable Council (GSTC)	REGIONAL SUSTAINABILITY OBSERVATORIES NETWORK	2021-2022
	Tourist Enterprise Survey (including monitoring of plastic use)		2020-2023
	Annual Sustainability Report (internal and sector) production with recognition from the Global Reporting Initiative (GRI)		2020-2023
Knowledge production	Creation of a platform for co-production of knowledge in the field of Tourism, to be integrated in the TravelBI (open database)	UNIVERSITIES AND RESEARCH CENTRES	2022
	Development of methodologies to define the tourist load capacity in territories for territorial planning purposes	UNIVERSITIES	2021-2022
	Active participation in international networks to disseminate good practices in Portugal	WTO, ETC, WTTC, OECD GSTC	(2016) - 2023

4.15.3.3 Tourism Sustainability Certification Systems and Awards

As previously mentioned and explained, regarding the individual tourism business and destinations of particular relevance, currently, in Portugal, there are two certified destination regions using two different tourism sustainability certification systems:

- The Alentejo region, through the "**Biosphere Responsible Tourism**" benchmark, implemented by the Biosphere Responsible Tourism Portugal consortium, an entity that, at national level, represents the Responsible Tourism System.
- The Azores, as the first archipelago in the world to achieve international certification of sustainable destination by an entity accredited by the Global Sustainable Tourism Council, namely the certifying entity **"Earth Check"** destinations.

Regarding the individual tourism business, some examples already awarded are indicated:

- **Portugal Green Travel (PGT):** as a DMC, in 2019 received for the first time in Portugal the certification for good practices in Sustainable Tourism, awarded by "Biosphere Responsible Tourism", which guarantees the quality and sustainability of the services provided to customers, by certified companies and which is based on an international benchmark of good practices in sustainable tourism (https://portugalgreentravel.com/);
- **League for the Protection of Nature (LPN):** as a NGO, in 2017 it was awarded as "Biosphere Reserve" (recognized by UNESCO), with it´s "Sustainable Castro Verde Program" (https://www.lpn.pt/en/nature-conservation/sustainable-castro-verde-program);
- **Dark Sky Alqueva:** as an association and tourist entertainment company with activities related to astrotourismn among many others (https://darkskyalqueva.com/en/):
  - in 2011 it was awarded as the "First Starlight Tourism Destination in the World", certification awarded by the "Starlight Foundation", supported by UNESCO and UNWTO;

- in 2019 and 2020 it was awarded by the “World Travel Awards” as “Europe’s Responsible Tourism”;
- in 2020 it became part of the “Global Top 100 Sustainable Destinations” in the “Global Green Destinations Day (GGDD)”;
- in 2020 it was awarded by the “Business Intelligence Group” with the “Sustainability Leadership Award”;
- in 2020 it was awarded by the “World Travel Awards” as “World’s Leading Tourism Project 2020”;
- in 2020 it was awarded by the “International Travel Awards” as “Europe’s Best Emerging Destination 2020” and “Europe’s Best Emerging Attraction 2020”;
- in 2020 it was awarded by the “ESQR – European Society for Quality Research” with the “European Award for Best Practices”
- in 2021 it was awarded by the “Global 100 – 2020” as the “Europe’s Leading Tourist Destination 2020”

On the other hand, Portugal as a whole, as a tourist destination was distinguished with the following awards:

- in 2019, Portugal received the distinction of “Tourist Destination Accessible 2019” during the “23rd General Meeting of World Tourism Organization (WTO/UNWTO)”, awarded for the first time that year by the UNWTO in partnership with Fundación ONCE, recognizing Portugal's effort to promote accessibility in tourism (http://business.turismodeportugal.pt/pt/Conhecer/estrategia-turismo/programas-iniciativas/Paginas/all-for-all-portuguese-tourism.aspx).
- In 2019, Portugal was distinguished as the “Best European Destination” by the “Sustainable Top 100 Destination Awards”, promoted by “Green Destinations”. These awards are supported by ITB Berlin, Green Destinations, TravelMole, Travelife, among other organizations (https://greendestinations.org/programs-and-services/top-100-destinations/).
- In 2020, Portugal was the 1st country in Europe to obtain the WTTC – World Travel & Tourism Council “Safe Travels” seal, recognizing compliance with safety requirements for everyone.

Portugal, as a tourist destination, through the national tourist authority (TdP) in collaboration with the “General Directorate of Health” and “NOVA Medical School”, also created a free system and certification seal for health and sanitary safety in response to the COVID-19 pandemic phenomenon: the “Clean & Safe”, created with the aim of supporting companies in identifying the measures to be adopted to contain the COVID-19 pandemic and, also, strengthening confidence in Portugal as a tourist destination; whether by tourists - national and foreign -, employees of companies, or the population in general. The initiative encompasses the entire value chain of the sector of areas and activities ranging from Tourism Enterprises to Local Accommodation, including Tourist Entertainment Companies, Restaurants, Travel and Tourism Agencies, Event Organizing Companies, Spas, Rent-a-Car , also passing by Tourist Offices, Golf Courses, Museums, Palaces, Monuments & Archaeological Sites, Libraries, Geoparks, Entertainment Venues, Casinos and Bingos, Motorhomes Service Areas and Airports. Entities adhering to the “Clean & Safe 2021 Seal” are now also covered by the WTTC

– World Travel & Tourism Council “Safe Travels” seal and the “European Tourism COVID-19 Safety Seal”.



Figure 23: TdP “Clean & Safe” seal (TdP, 2020; 2021)



Figure 24: WTTC “Safe Tavels” seal (WTTC, 2020)



Figure 25: “European Tourism COVID-19 Safety” seal (TdP, 2021)

4.15.4 Summary and conclusion on national situation

4.15.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The main ambitions and core achievements regarding sustainable tourism and the role of SMEs in it are directly related to the 17 SDGs, as the table below on the next page reflects.

Table 11: Main ambitions and core achievements regarding sustainable tourism and the role of SMEs in it, directly related to the 17 SDGs ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

Sustainable Development Goals			Areas of action of the "+Sustainable Tourism 20-23"plan
SDG1	No Poverty	**Eradicate Poverty in all its forms, everywhere.** Being one of the largest sectors in the world, and one that is growing faster, Tourism is in a privileged position to be able to foster economic growth and development at all levels, as well as combat asymmetries through job creation. The development of tourism sustainable development and its impact on communities can be directly related with the goals of poverty reduction through the promotion of entrepreneurship and small businesses and also through the strengthening of skills disadvantaged groups, in particular women and young people.	**Value Of Cultural Heritage** **Value Of Natural Heritage** **Reduction Of Inequalities** **Training For Sustainability** **Promotion Of The Offer Throughout The Territory And All Year Round**
SDG2	Zero Hunger	**Eradicate hunger, achieve food security, improve nutrition and promote Sustainable Agriculture.** Tourism can stimulate agricultural productivity by promoting production, utilization and selling local products in tourist destinations and through their full integration in the sector's value chain.	**Circular Economy** **Training For Sustainability**
SDG3	Good Health and Well-Being	**Ensuring access to quality healthcare and promoting well-being for all, in all ages.** Tourism receipts can be reinvested in health care and services, improving maternal health, reducing child mortality and preventing disease.	**Sustainable Companies & Destinations** **Mitigation Of Climate Change**
SDG4	Quality Education	**Ensure access to inclusive, quality and equitable education, and promote lifelong learning opportunities for all.** Tourism has the potential to promote inclusion. For Tourism to thrive is a competent and qualified workforce is required. The tourism sector offers	**Reduction Of Inequalities** **Training For Sustainability** **Knowledge Production**

		Direct and indirect employment opportunities for young people, women and people with special needs and should provide incentives to invest in education and professional qualification.	
SDG5	Gender Equality	**Achieving gender equality and empowering all women and girls.** Tourism can empower women in multiple ways, and in particular through the offer of jobs and income-generating opportunities in large, medium and small tourism-related businesses. Being one of the sectors with the highest percentage of employed women and entrepreneurs, tourism can serve to unleash women's potential in all spheres of society.	**Reduction Of Inequalities**
SDG6	Clean Water and Sanitation	**Ensure the availability and sustainable management of potable water and sanitation for all.** The tourism investment required for the provision of utility services can play a critical role in gaining access to water and safety, as well as hygiene and sanitation for all. Efficient use of water in tourism, pollution control and technological efficiency can be the key to safeguarding our most precious resource.	**Strengthening Environmental Efficiency In The Offer** **Tourism Training For Sustainability**
SDG7	Affordable and Clean Energy	**Ensuring access to reliable, sustainable and modern energy sources for all.** As an energy-intensive sector, tourism can accelerate change for a greater share of renewable energies in the global energy mix. To the promote investments in clean energy sources, tourism can help reduce greenhouse gases, mitigate climate change and contribute to everyone's access to energy.	**Strengthening Environmental Efficiency In The Offer** **Tourism Training For Sustainability**
SDG8	Decent Work and Economic Growth	**Promote inclusive and sustainable economic growth, full employment and productive and decent work for all.** Tourism is one of the biggest driving forces of world economic growth, currently providing one in ten jobs worldwide. Creating decent work	**Reduction Of Inequalities** **Training For Sustainability** **Promotion Of The Offer Throughout The Territory And All Year Round**

		opportunities in the sector, in particular for young people and women, as well as policies that favor better diversification through tourism value chain, the sector has the capacity to positively impact the socio-economic development.	
SDG9	Industry, Innovation and Infrastructure	**Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation.** Tourism development needs good public and private infrastructure. The sector can influence public policies for the modernization and rehabilitation of infrastructures, making them more sustainable, innovative and efficient in terms resources and towards growth based on low carbon emissions it can attract tourists, but also foreign investment.	**Circular Economy** **Sustainable Mobility** **Value Of Cultural Heritage** **Value Of Natural Heritage** **Innovation For And Sustainability** **Design Portugal As A Sustainable Destination**
SDG10	Reduce Inequalities	**Reducing inequalities within and between countries.** Tourism can be a powerful instrument for progress and reduction of inequalities when involving local communities in parallel with the main stakeholders in its development. Tourism can contribute to urban renewal and rural development, giving people the opportunity to thrive in their place of origin. Tourism serves as an effective means of economic integration and diversification.	**Sustainable Companies And Destinations** **Value Of Cultural Heritage** **Value Of Natural Heritage** **Reduction Of Inequalities** **Promotion Of The Offer Throughout The Territory And All Year Round**
SDG11	Sustainable Cities and Communities	**Making cities and communities inclusive, safe, resilient and sustainable.** Tourism can contribute to the improvement of urban infrastructure and accessibility, as well as to promote regeneration and preserve heritage goods on which tourism depends. Investment in green infrastructure (more efficient transport, reduced air pollution) is expected to result in smarter and greener cities, not only for residents, but also for tourists.	**Sustainable Companies And Destinations** **Sustainable Mobility** **Accessibility For All** **Value Of Cultural Heritage** **Value Of Natural Heritage** **Innovation For And Sustainability** **Design Portugal As A Sustainable Destination** **Promotion Of The Offer Throughout**

			The TerritoryAnd All Year Round **Tourist Awareness**
SDG12	Responsible Consumption and Production	**Ensure sustainable consumption and production patterns.** Tourism needs to adopt sustainable modes of production and consumption to more sustainable development. It is essential to have tools for monitoring their performance in terms of sustainable development, including energy, water, waste, biodiversity and job creation.	**Circular Economy** **Innovation For And Sustainability** **Tourist Awareness** **Performance Monitoring For Sustainability** **In The Tourism Sector**
SDG13	Climate Action	**Take urgent measures to combat climate change and its impacts.** Tourism contributes to climate change and is affected by it. The actors of tourism must play a leading role in the global response to change climate. By reducing your carbon footprint in the transport and accommodation, tourism can benefit from low-emission carbon growth and help address one of the most pressing challenges of our time.	**Strengthening Environmental Efficiency** **In The Tourism Offer** **Mitigation Of Climate Change** **Circular Economy** **Sustainable Mobility** **Innovation For Sustainability** **Training For Sustainability**
SDG14	Life Below Water	**Conserve and sustainably use oceans, seas and resources for sustainable development.** Coastal and maritime tourism depend on healthy marine ecosystems. Tourism development should be part of Integrated Coastal Zone Management, in order to help conserve and preserve fragile marine ecosystems and to serve as a vehicle to promote a blue economy, contributing to the use sustainable use of marine resources.	**Mitigation Of Climate Change** **Enhancing The Nautical And Bathing Offer**
SDG15	Life on Land	**Protect, restore and promote the sustainable use of terrestrial ecosystems, sustainably manage forests, fight desertification, halt and reversing land degradation and halting biodiversity loss.** Biodiversity and natural heritage are often the main reasons by which tourists visit a destination. If it is subject to sustainable management, in	**Sustainable Companies And Destinations** **Mitigation Of Climate Change** **Value Of Natural Heritage**

		fragile areas, tourism can play an important role not only in conservation and preservation of biodiversity, but also as a means of alternative livelihoods for local communities.	
SDG16	Peace, Justice and Strong Institutions	**Promote peaceful and inclusive societies for sustainable development providing access to justice for all and building effective institutions, responsible and inclusive at all levels.** How tourism revolves around billions of encounters between people from diverse backgrounds and cultures, the industry can foster tolerance and understanding multicultural and inter-religious, laying the foundations for more peaceful societies. Tourism, which benefits and involves local communities, can also consolidate peace in post-conflict societies.	**Training For Sustainability** **Tourist Awareness**
SDG17	Partnerships for the Goals	**Strengthen the means of implementation and revitalize the Global Partnership for Sustainable development.** As a result of its cross-cutting nature, tourism has the ability to strengthen public-private partnerships and involve multiple actors - international, national, regional and local - to work together to achieve the SDGs and other common goals.	**Sustainable Companies And Destinations** **Performance Monitoring For Sustainability In The Tourism Sector** **Knowledge Production**

Regarding the destination Portugal in particular, the goals for 2023 are presented in the following table.

Table 12: Goals to be achieved in 2023 ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

Goals in 2023 (year 0 – 2021)	Indicator
Have 75% of tourist enterprises with systems of energy, water and waste management efficiency.	Number of tourist enterprises with implemented good practices of energy, water and waste management efficiency.
Having 75% of tourist enterprises that do not use single use plastics.	Number of tourist enterprises that do nor use single use plastics in their operations.
Clean & Safe certification: 25.000 adherents, 30.000 graduates and 1000 audited	Number of adherents, graduates and audits performed.
50.000 professionals trained in the areas of sustainability	Number of participants in training actions.
200 international references about Portugal associated with sustainability	Number of articles published in the media.

TdP celebrated "European Maritime Day" (May 20) with the launch of a set of tools and best practices guides, aimed at companies in the sector, developed under the project "Sustainable Tourism: a better future for (with) all", part of the "+Sustainable Tourism 20-23" plan. The objective is to increase the skills of companies and SME'sprofessionals in the sector with regard to the sustainability of the activity, leverage existing initiatives, give visibility to good practices and inspire everyone to do more and better in building an increasingly sustainable tourist destination. The project, financed with 200.000,00€ euros by the "Environmental Fund", addresses different themes that include good practices for "Circular and Sustainable Restautants sector"; "Best Practices for a Circular Economy in Tourist Accommodation"; "Carbon Neutrality in Tourism Enterprises"; "Sustainable Construction in Tourist Resorts"; "Single-Use Plastics in the Tourism Sector" and "Water Efficiency in Golf Courses in Portugal". The contents result from partnerships with "Portugal Hotel, Catering and Similar Association" (AHRESP), NOVA University, Travel Without Plastic, Portuguese Golf Federation and National Council of the Golf Industry (CNIG). In line with the greater purpose of the "For a better Planet, a better Tourism" campaign, TdP intends to enable the sector for a trajectory that wants to be more sustainable and to support companies and SME's in this transition to a better planet, capable of ensuring generations following the usufruct of the assets that distinguish us today as a tourist destination and, at the same time, contribute to the strengthening of the competitiveness of tourist companies and SME's. The tools and best practice guides (only in portuguese) can be found at this link to consult and/or download.



Figure 26: Example of best practice guides within the scope of the project "Sustainable Tourism: a better future for [with] everyone" (http://business.turismodeportugal.pt/pt/crescer/sustentabilidade/Paginas/guias-ferramentas-projeto-turismo-sustentavel-um-melhor-futuro-para-com-todos.aspx)

4.15.4.2 Challenges for the development of sustainable tourism and for SMEs

The biggest challenges for the development of sustainable tourism and for SMEs are closely linked with the implementation of the various actions (119 in total) that integrate each of the four axes of the "+Sustainable Tourism 20-23" Plan (TdP, 2021). Implementation must be built in a plural way, involving all partners and mobilising all actors: institutions, regions, businesses and civil society. The current positioning, present and future challenges, and changing external environment impose a shared responsibility for sustainability in the Tourism sector. In this sense, integrating all the Tourism stakeholders, through a Monitoring Group for sustainability in Portugal as a tourist destination, is the key to the implementation process of this plan. The shared management model and the monitoring of the responsibility of Turismo de Portugal, as the coordinating entity, in articulation with the Monitoring Group, will ensure the implementation of the plan with the consequent implementation of the initiatives and projects identified and the fulfilment of the challenges posed, in a dynamic perspective and with the focus on gradual growth for an increasingly sustainable Tourism in Portugal.

Table 13: Implementation of the "+Sustainable Tourism 20-23" plan ("+Sustainable Tourism 20-23" Plan [TdP, 2021])

COORDINATION	TURISMO DE PORTUGAL	- Streamline the implementation of the Plan - Mobilise partners - Monitor the implementation of the Plan
DYNAMISATION	Confederation of Turismo de Portugal Sector Associations Regional Tourism Entities NEST – Tourism Innovation Centre	- Stimulate the implementation of the Plan in their respective areas of competence - Generate knowledge and experience sharing networks
REFLECTION	MONITORING GROUP FOR SUSTAINABILITY	- Debate on sustainability in the sector and subsectors relevant to Tourism - Share of national and international knowledge and good practice
	(includes interlocutors from the entire value chain; international partners)	- Monitoring of the implementation of the Plan - Identification of recommendations for action in the short/medium term

4.15.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

According to the Secretary of State for Tourism of Portugal (2020), once this COVID-19 phase is over, Portugal will have to strengthen efforts in the sense of returning to the path we were on

go through in pursuit of the “Tourism Strategy 2027”, innovating and working for that Portugal be recognized as a leader of the tourism of the future.

First of all, Portugal have to innovate in the offer, adapting it to new trends in demand. The criteria that will guide the demand in the future will be naturally distinct. Portugal will watch the changes in customer behavior, which it will look for more security in the first place. On one hand, compliance and adoption of standards and safety measures on the part of equipment and tourist facilities, bearing in mind that health and/or food security will be a priority. On the other hand, the implementation of a policy information that allows clear communication regarding the identification of possible challenges of security, as well as the control of possible risks inherent to the tourist practice and also the dissemination information on the provision of support services in emergency cases, it will become a priority.

Second, the customer will look for more flexibility when choosing a tourism destination. Portugal will have to innovate, giving the tourists more travel rights, namely with regard to requirements information or the responsibility of each party for the execution of the trip, especially if this is not correctly executed or in case of changing circumstances.

Third, the customer will look for more niche activities, in which health and outdoor experiences will surely be distinguishing factors, making it necessary to work the offer that favors nature. Happily, Portugal concentrates varied landscapes and species that make any trip, by no matter how small, a pleasure to discover.

According to the barometer and a study produced by “IPDT - Tourism and Consulting”, a portuguese institute specialized in sustainability certification processes for tourism and production of tourist information, affiliate member of the UNWTO – United Nations Worls Tourism Organization and the GSTC - Global Sustainable Tourism Council, sustainability and safety are the keywords that should guide the concerted action of the entire tourism ecosystem, with emphasis on the need for maintenance and creation of jobs and qualification of human resources, guaranteeing service quality levels and tourism products, bet on communication plans and definition of models for valuing local and cultural heritage. For the development of the study "Guide to the Recovery of Tourism", the IPDT September 2020 survey was launched consulting the opinion of senior technicians and executives of Municipalities and Regional Tourism Entities responsible for the management of the tourism sector in Portugal.

COVID-19 appears as an opportunity to reflect about a new tourism destination development model. The answer to this new reality lies in a new tourism growth model, in which destinations will be committed to sustainability, with territorial and social cohesion, with innovation, with entrepreneurship and technology and valuing people.

4.15.4.4 Recommendations for boosting Sustainable Tourism for SMEs

According to the same study previously mentioned in 4.1.4.3, in a country like Portugal where the business fabric is overwhelmingly constituted by SMEs (99.9%) with the tourism sector not being an exception, the recommendations for boosting sustainable tourism for SMEs are mainly in the following fields of action:

- **Qualify and train to guarantee confidence:** destinations must ensure specific training to human resources about the protection and prevention measures of risk in various thematic áreas. Enable will allow to apply security measures and convey the idea that the destination is safe and is prepared to receive tourists.
- **Diversify the knowledge:** there must be a set of efforts to stimulate human resources to constant training and updating. Portugal must bet in the training of skills that allow SME's to position themselves competitively in the market and adopt sustainable practices.
- **Information "to the minute":** dhare relevant information with human resources will be critical to keep them updated on developments of COVID-19 and on the measures of protection. Several destinations have sent this information in an automated way to the database of tourist SME's.
- **Keep digital channels active:** it is essential to carry out a communication strategy based on constant updating of the digital channels of the destinations and tourist SME's. It is considered important to adopt a positive communication style to inspire to travel.
- **Acting in the indicated markets:** destinations must develop a strategy of communication aimed at markets with greater predisposition to travel. There must be constant monitoring of the evolution of the pandemic in issuing countries and in proximity markets to define the strategy and moments of communication best suited to promote and sell tourist destinations and SME's services.
- **Articulate with all sectors:** the communication plan for tourism should include other areas of activity, namely the health sector, which will be an ally in the resumption of tourist activities. Health crisis management and measures of security are key point of communication with the tourists.
- **Avoid the "1 for all" effect:** at the moment we live, just one non-compliance with the rules will be enough so that the feeling of trust by the target is affected. Thus, the SME's should be made aware of the importance of compliance with measures of security.
- **Readjust positioning** (if necessary): the study of the tourist profile and the analysis of the market may show trends of behavior important to the destinations and SME's. The future of tourism will bring or will confirm new concepts, namely sustainability. This could be the ideal time for reviewing strategies for tourism, already preparing the challenges of the next years.
- **Support local production:** more and more, tourists are trying to contribute actively for local businesses. And, the truth is that the tourism has contributed to the creation and maintenance of jobs, for the preservation and enhancement of the resident communities, with emphasis on the discovery of gastronomy, agriculture, crafts and culture. Given this

reality, more more than ever, destinations must be side by side of local SME's and producers, legislate and support the sense of promoting them.

- **Monitor COVID-19 impact at destination:** studying and knowing the real impact of the pandemic in tourism SME's will allow to define policies to support and protect the sector, according with their specific needs.
- **Slow tourism is increasing trend:** slow tourism will mark the future of tourism, what will contribute to the average stay not suffer great decreases. Visitors go look for the opportunity to become a part of destinations, at a travel pace that allow to be in contact with the resident community and apprehend the local culture.
- **Contribution to the local commerce:** tourists will want to contribute to the local commerce, thus increasing spending during the trip. Also the desire to getting to know the local culture and gastronomy will be factors that will influence the increase in value average spent per tourist.
- **Traveling to a secondary city it's the new normal:** the tourists of the future are more concerned about environmental preservation and will look for destinations and SME's alternatives if this translates into less impact. In addition to this, there is also the concern with health security will influence this new standard behavior that will benefit economically and socially other territories and their communities.
- **More traditional and unique experiences:** there will now be a greater demand for experiences that allow the traveler to immerse himself in the local culture. Less popular sites allow you to satisfy the need to visit and learn about new cultures, gastronomies and traditions, at a slower pace. According to International Euromonitor (August 2020), 87% of consumers believe it is importante experience other cultures and 94% value real experiences.
- **Nature and authenticity are at the top of preferences:** this will be a new trend for allowing reconciling the concept of social isolation with the discovery and contact with nature. It's time to favor products and services that maximize the positive impact of tourism in the environmental, sociocultural and economic dimensions.
- **Outdoor spaces will be valued:** destinations and SME's tourist companies should bet on products and services that allow tourists to enjoy of outdoor wellness activities. The wellness global movement grows before the eyes and the hotels think about how they can bring health and well-being to customer experience. Successfully integrate the well-being in the hotel or other tourist SME's experiences improves significantly the quality of the stay.
- **The new luxury - wellness travel:** public health security and the need to adopt practices that promote well-being are two themes that were highlighted with the onset of the pandemic. In the long term, tourism of wellness will be at the top-of-mind of tourists.
- **Exclusive and customized activities:** the tourists of the future will be less willing sharing travel experiences with other tourists and will look for more restricted, exclusive and customized activities. As a result, they will be more available to pay more for these services.

- **Sustainability certification will be the golden key to destinations and SME's:** destinations and SME's must develop a strategy that defend an integrated vision, with added value for the economy, for society, for culture and for the environment. Invest in certification that will be a attractive to tourists of the future who, more than never, will value environmentally friendly practices.
- **Sustainable practices? Tourists say "Yes!":** tourists are increasingly choosing companies and destinations that promote sustainability practices. Choose to gradually adopt sustainable practices is the best way to ensure benefits for all: residents, tourists and investors. According to Booking.com (April 2019), 56% of young tourists want their stay to be sustainable.
- **There will have to be a positive impact to the resident community:** tourists will intensify their search for destinations that value and protect local communities. Each time more, the tourist experience will be seen as a mean to generate real benefits for residents, for the local economy and for preservation of heritage.
- **Last minute bookings are growing:** last minute travel booking came to be a growing behavior and it should take on a new dimension. The advances and retreats in restrictions and air corridors they can also motivate last minute booking.
- **Prepare the trip in detail:** in the future, traveling will be much more than choosing an accommodation, booking a plane, making the bags and create a travel guide. The tourists will detail each moment of the trip that will go from air quality and infrastructure to guarantee the efficiency of the health system of every destination.
- **Travel insurance will be determinant in trust to travel:** from now on, when booking of a trip, will be given greater importance to the form that asks if you want to guarantee the flight. It is important that the airlines, the TO's, SME's and insurance companies adapt to this new reality. According with a Europ Assistance study (July 2020), 54% of respondents say they intend to buy travel insurance (in February the figure was 48%).
- **The new reality brings a new priority at the moment of travelling:** due to uncertainty about the evolution of the pandemic, tourists will prioritize the services that have a flexible policy of cancellations. This practice will bring greater confidence and tranquility in the moment of the booking, which could be an asset for enhance the increase in the number of reservations. It is essential to ensure sufficient flexibility passengers, allow them to travel in the same route under the same service conditions or book a tour package with it type of services or equivalent quality.

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4.16 Romania

Carmen Chasovschi and Simina Manea
(As of December 2021)

Introduction

In the last decades, Romanian Tourism has promoted the countries natural and cultural resources, associated with authenticity and wilderness preservation, as competitive advantages and main values for tourism in Romania. The branding policies, developed in 2011 by the Ministry of Regional Development and Tourism (*Ministerul Dezvoltarii Regionale si Turismului*, 2011), have launched the slogan "Romania. The Carpathian Garden", pointing out the need to emphasize on a responsible tourism connected to nature and sustainable development.

The tourism activity at national level is coordinated by the General Directorate for Tourism (*Directia Generala de Turism*), integrated in the Ministry for Economy, Entrepreneurship and Tourism (*Ministerul Economiei, Antreprenoriatului si Turismului*). The main fields of activities are related to the development and implementation of tourism strategies, promotion of Romania as a tourism destination abroad and the development of tourism infrastructure, certification and quality control of tourism services providers as well as destination management.

4.16.1 Political framework for Sustainable Tourism

In the scope of the recent years, sustainable development was placed at the top of the government agenda. In 2016, the Romanian Parliament issued the "Declaration regarding the Objectives of Sustainable Development" (*Parlamentul României*, 2016) aiming to underline the engagement in this field. The document is a declaration that supports the regulations and financing of the actions related to sustainability. Furthermore, a specialized department was set up, the Department for Sustainable Development, to explicitly promote and support the implementation of the proposed measures.

In the **Report for elaboration of the Action plan for the implementation of National Strategy for Sustainable Development 2030/SNDD RO 2030** *(Raportul pentru elaborarea planului de acțiune pentru implementarea SNDD RO 2030)*, (Departamentul pentru Dezvoltare Durabila, 2020b) all the synergies between different initiatives were mapped and analysed as well as identified with regard to their relevance for the development of the action plan. In five chapters the strategy approaches the most important dimensions of sustainable development, most of them being indirectly connected to tourism.

The general framework for Sustainable Development has been established by the **National Strategy for Sustainable Development of Romania, Horizons 2013-2020-2030/SNDD -** (*Strategia pentru Dezvoltarea Durabila a Romaniei. Orizonturi 2013-2020-2030*)**,** (Departamentul pentru Dezvoltare Durabilă, 2020). This strategy constitutes the main development lines for the implementation of the United Nations Agenda 2030, in all sectorial politics related to the national sustainable development.

As well, at page 58 tourism is mentioned as a separate priority: *"Romania has ratified the Protocol on Sustainable Tourism to the Framework Convention on the Protection and Sustainable Development of the Carpathians. One goal committed to in the Carpathian Convention is the opening of the Carpathian Sustainable Tourism Centre Romania in Brașov, under the Carpathian Sustainable Tourism*

Platform. The aims of the National Tourism Development Master Plan for Romania 2007-2026 (NTDMP), which is currently under implementation, are mentioning among others:

- *the optimization of the use of environmental resources;*
- *preservation of nature, conservation of natural heritage and biodiversity;*
- *to respect the social and cultural authenticity of guest communities, and to preserve built heritage, cultural life and traditional values, thereby promoting intercultural understanding and tolerance;*

Moreover, the National Strategy for the Development of Ecotourism in Romania has been drawn the "Criteria for the Designation of Ecotourism Destinations" (Departamentul pentru Dezvoltare Durabilă, 2020a, p. 58). In the same document (p. 59), green tourism is presented as a priority, within the context of an action related to the plan for development: *"Create and implement a coherent plan for the development of tourism, including green tourism (a considerable generator of work and income), by improving infrastructure and access ways to tourist destinations, professionalizing staff and wisely exploiting cultural traditions and national characteristics."*

One of the 2030 targets mentions agrotourism and ecotourism as key development areas:

"Create a tourism sector that is competitive in the long time, develop agrotourism, ecotourism, and rural, spa and cultural tourism, and improve Romania's image as a tourist destination" (p. 59).

Furthermore, agrotourism is presented as a way of improving the preservation of cultural heritage:

"Increase the value of specific cultural resources at local level by protecting cultural heritage, cultural identities and traditional professions (artisanal, artistic, culinary); encourage the ongoing development of agritourism" (Departamentul pentru Dezvoltare Durabilă, 2020*,* p. 74).

Below, some selected objectives and measures from the above-mentioned strategy, related to sustainable tourism (key strategies 2030), will be presented:

- Table 1, Progress in SD of Romania (2018/2008), 2nd Objective (Zero Hunger) has an additional target related to the food industry, production of local species, in local food industry, recognition of the local valuable products ("Increase of the number of products recognized/certified at European Level as being "traditional"). Such measure could support the Romanian destinations that are promoting the local food as an important component of their tourism offer;
- Objective 6 (Water and Sanitation) is related indirectly to the tourism industry due to the impact on the rural tourism. A large part of Romanian tourism is organized in rural area. Tough, many rural communities are lacking proper modern infrastructure. The associate indicator is the number of population connected to the public services for water supply. Additionaly, at the same objective No. 6, it is encouraged the use of alternative energy sources;
- Objective 8 (Decent work and economic development), Indicator No. 5, directly addresses tourism. The objectives is "elaboration and implementation of a coherent program for the development of tourism, including agro-tourism, that generates incomes and workplaces, through improvement of infrastructure and access roads to the tourism spots,

professionalization of personnel and wise valorization of the cultural traditions and local specificity".

The so-called Romanian Sustainability Code (*Codul Sustenabilitatii*) aims to create transparence and comparability related to the performance of sustainability. The Code will create a framework for a close involvement of the private sector in the sustainable development and will establish clear regulations for compulsory reporting system of company indicators, policies and activities related to sustainability. The reporting platform will become active starting with 2022 and will provide more transparency regarding the impact that the companies have in the implementation of Sustainable Development Agenda 2030, agreed by Romania (Departamentul pentru Dezvoltare Durabila, 2020b).

Romania has begun to adopt measures to promote the 2030 Sustainable Development Agenda by addressing a Global Action Plan dedicated to the reduction of relieving poverty, eliminating social inequalities, and preserving the environment by 2030. According to the Department for Sustainable Development, Romania has developed a national framework for implementing the 2030 Agenda initiatives as well as the 17 SDGs. The plan focuses on Romania's growth on three dimensions (economic, social, and environmental), with an emphasis on the citizen, his needs, and their fair, efficient, and integrated treatment.

In the "Evaluation Report of the Policies, Plans and Strategies" related to the objectives of the "National Strategy for Sustainable Strategy 2030", a description of all relevant policies and regulations, was presented in extenso (Departamentul pentru Dezvoltare Durabila, 2020b). A number of strategic documents indirectly related to tourism (relevant for the Horizon 2030 goals) have been selected in the list below:

- National Strategy and Action Plan for Biodiversity Conservation 2010-2020;
- Romanian National Strategy regarding the Climate Changes 2013-2020 (Ministerul Mediului și Schimbărilor Climatice, 2013);
- Strategy for Culture and National Heritage 2016-2022;
- Strategy for development of agro-food on medium and long term 2020-2030;
- National Strategy for Research, Development and Innovation 2014-2020;
- Strategy for Marine Environment (OUG 71/2010) & National Monitoring Program, updated according to the Directive for the Marine Environment Strategy;
- Sectorial strategy in the field of cultural and national patrimony for the time-frame 2014-2020;
- UNECE Strategy for education for sustainable development;
- National Program for Rural Development;
- Transportation Master Plan.

According to the report (chapter 6) (Departamentul pentru Dezvoltare Durabila, 2020, p. 127.), the "strategic priorities of Romania, identified in the long time strategic framework – Horizon 2030, proves an irreversible commitment to: Green Transformation (Green Tourism / Ecotourism & Balneary tourism), Green working places and Digital Transformation. Annex no. 3 of the report is presenting the particular / specific targets until 2030. Among all, there are some directly or indirectly connected to tourism. These ones are mentioned bellow:

- Increase of the ecological agriculture among the total production;
- Consolidation of traditional methods for medicinal plants and wood berries/fruits in the mountain areas;
- Support for local traditions through the increase of the number of products with special characteristics according to the geographical origin;
- Establishing of legislative framework for vocational programs and lifelong learning;
- Expansion in high education programs of sustainable development programs (p. 220);
- Valuing (p. 223) of specific local cultural resources through the protection of cultural heritage, of cultural identity and traditional occupations (handicrafts, artistic, gastronomic);
- Encourage the development of agrotourism;
- Consolidation of efforts for protection and preservation of natural and cultural heritage, of urban and rural landscape elements (p. 224);
- Development of international cooperation with the Danube riverain states, for the improvement of ecological characteristics of the Danube and reduction of the negative impact of the rivers, on the marine ecosystem;
- Conservation of wetlands, among the Reservation of Danube Delta Biosphere, wetland unique in Europe, for the research, protection and conservation of the diversity of natural heritage;
- Conservation of mountain ecosystem, including their biodiversity, for the increase of their capacity for delivering important benefits for sustainable development; (p. 230);
- Support for the institutions and national / European R&D for study, administration, protection and conservation of the diversity of natural heritage;
- Sustainable administration of forests, development of informatic integrated system for the monitorization of exploitation and transport of wood, reforesting programs;
- Transition to a circular economy through complementary approaches that involves traditional methods and last-generation technologies, for the recuperation of natural capital;

Among all these measures, a support scheme will be implemented for development of the entrepreneurial mindset. One of the targets is "the promotion of entrepreneurial culture and promotion of necessary skills through modernization of school workshops, especially in professional and technological education units; set up of entrepreneurial contests, encouraging the mentorship and partnerships with SMEs at the local level".

4.16.1.1 National Sustainable Tourism Policies and Strategies

The general regulations governing the tourism activity in Romania, with impact on sustainable development of tourism are:

- HG[29] nr. 58 / 1998: the primary and general regulations related to the organization and implementation of tourism in Romania;
- OG[30] nr. 19/2006 regarding the use of the Black Sea Coast and the control of the beach related activities;
- Law nr. 526/2003 for the approvement of mountain tourism "Super Ski in Carpathians"

[29] HG – Government Regulation
[30] OG – Government Ordonance

- OUG31 nr. 62/2004 for the organization of tourism parks;
- Law nr. 389/2006 regarding the Convention for the protection and sustainable development of Carpathians;
- Law nr. 72 / 2014 for the Protocol regarding the sustainable tourism, adopted in Bratislava and signed by Romania at 27th of May 2011;
- Convention for protection and sustainable development of Carpathians, adopted in Kiev at 22 May 2003;
- OUG nr. 202/2002 regarding the integrated management of coast areas;
- OG nr. 107/1999 regarding the commercial activities of tourism services packages, republished with additional changes;
- OUG nr. 8/2009 regarding the holiday vouchers;
- Law nr. 170/2016 regarding the taxation of specific tourism activities.

The official page of the General Directorate for Tourism[32] is presenting on its subdomain "strategies" three programs and strategies: (1) Strategy for Development of Balneary Tourism (*Strategia pentru dezvoltarea turismului balnear*); (2) National Strategy for Development of Ecotourism (*Strategia nationala de dezvoltare a ecoturismului*); (3) The Program for the Development of Tourism Investments (*Programul pentru dezvoltarea investitiilor in turism – Masterplanul investitiilor in turism*). Additional strategies were issued a few years back. Being important programmatic documents, with an important impact on sustainable tourism, they have been added to the list presented by the Directorate for Tourism. A detailed presentation follows in the present subchapter.

"The National Tourism Development Strategy, 2019-2030" (*Strategia de Dezvoltare Turistica a Romaniei, 2019*) is the main tourism policy paper, that was developed with the support of the World Bank (The World Bank, 2018). In 2018 tourism was declared a priority area as a catalyst of Romanian economic development. The strategy includes the main strategic development directions for Romanian tourism and an action plan for the industry. The first part includes the evaluation of the tourism sector and the second part the strategy and the action plan. It was developed with the consultation of several stakeholders at national and regional level. The development directions are addressing different identified problems, as, for example, the poor development of tourism destinations, insufficient valorization of existing tourism offers, poor quality of tourism experiences and services. The recommendations formulated in the masterplan are encouraging the development of four main segments, that could increase the number of visitors and the revenues generated by international tourists: (1) cultural heritage, cultural tourism and patrimony (together with gastronomy); (2) nature and adventure, including ecotourism and rural tourism; (3) health and wellness, with focus on the rich balneary resources; (4) MICE segment (meetings, incentives, conferences, events). Additional to these, the other common three segments could be further consolidated: sea and sun, winter sports and city breaks. (Source)

The development of eco-tourism, natural and rural tourism is presented as a priority established by the government program. In Chapter no. 4 of the strategy, the 3rd Principle is referring specifically to the sustainability as a viable alternative for future development. "Sustainability as a transversal element" recommends that the development and management guidelines for sustainable tourism

[31] OUG – Urgency Government Regulation
[32] Official national tourism body, subordinated to the Ministry of Economy, Energy and Business Environment

should be applied to all types of tourism, to all destinations, including to the mass and niche tourism." The principles of sustainability refer to the environment, cultural and socio-economic aspects of tourism development: it is needed a balance among all these three dimensions, in order to obtain long term sustainability". (Please include source)

Another important strategic document is **"The National Tourism Development Masterplan, 2007-2026"** *(Master Planul pentru Dezvoltarea Turismului Național al României 2007-2026)* that was developed with the support of the World Tourism Organization by the Ministry of Regional Development and Tourism (World Tourism Organisation, 2007). The Master Plan" has established the framework for the implementation of a sustainable approach of tourism development in Romania". The period covered is of twenty years, with an action plan formulated for six years (2007-2013), correlated with the financial tools of structural funds. The immediate goal was to establish the basis for the development of sustainable management in the tourism industry, especially in what concerns the natural and cultural resources. The sustainable development strategy started from the idea of a fair and ethic tourism, not only from the ecological perspectives, but, most importantly, taking into consideration the economic, social, and cultural consequences. The strategy was elaborated by the National Authority for Tourism in 2006 and comprises four categories: The development and modernization of touristic products, the increasing of the quality of services and their diversification, and the promotion of the tourism industry and the improvement of the business environment. The strategy underlines that the tourism industry must become a priority economic activity among the national economy, among the national strategies of development, taking into consideration that the industry has the potential to generate economic growth, jobs, enticing effects for other sectors of the national economy and a favorable impact. For the implementation of the strategy has foreseen an active partnership between government, economic agents, and private investors both national and international and also through the involvement of the Federation of Employers from the tourism sector and professional associations. The Romanian Government imposed strict actions of cleaning, care, and protection of the environment. Currently, it is imposed that the systems of the environmental management to comprise the plans of tourism development and vice versa. In this case a close monitoring to maintain high standards of conservation is necessary.

"The National Strategy for Development of Ecotourism 2019-2029" (*Strategia națională de dezvoltare a ecoturismului - context, viziune și obiective - 2019-2029)* has as an aim to create the framework for ecotourism by developing a network of certified eco-tourism destinations and by creating ecotourism products, competitive on the national and international market (INCDT, 2017). The strategy has as key areas the development of institutional and associative organizations, the improvement of tourism infrastructure and land use. Another important goal is associated with education and awareness rising in the field of ecotourism, professional development and support instruments for the private sector and for local development.

The most important contribution for sustainable development in Romania was made by the Association of Ecotourism in Romania (AER) that has coagulated different stakeholders nation-wide and promoted intensively eco-tourism as a chance for future development. The National Strategy for Development of Ecotourism was preceded by the National Strategy for Development of Ecotourism (2009) that was developed in 2009, by the National Institute for Tourism Research (INCDT) in close cooperation with AER (INCDT, 2017).

The strategy presented the current situation of ecotourism in Romania, resources, infrastructure, programs, premises for the development of ecotourism. The sustainable development of tourism is tackled in extenso, in the entire content of the document. The strategy creates the general framework for the implementation of ecotourism and sustainable tourism across Romania, in a general effort coordinated by AER – Association of Ecotourism from Romania (*AER - Asociația de Ecoturism Din România*, n.d.).

The ”**Strategy for the Development of Balneary Tourism” / *(Strategia pentru dezvoltarea turismului balnear)***, is based on the implementation of an innovative approach and of a public- private partnership, supporting the development of health tourism. It has the final aim of providing an innovative positioning regarding a new green balneary tourism product (Ministerul Turismului, 2019). The first part of the strategy is focused on an analysis of the evolution of the balneary tourism and tries to find answers regarding the new directions of evolution, at national, regional and on main regional resorts. The second part is establishing the needed strategic measures, formulated on the identified strengths and weaknesses. It identifies the most relevant international and national stakeholders and the best practices worldwide. In the Chapter “Opportunities for Romania” (p. 149), the first point approaches sustainable principles, under the title “A green balneary tourism, harmonized with the general positioning of destination Romania”. Moreover, sustainable development is mentioned as a key value for the future development in the objectives and in the formulated measures (p.20, p. 23, p. 26, p.42, p 198) (Ministerul Turismului, 2019).

The development of local communities in the areas with a high tourism potential was addressed as well by the **”Program for the Development of Tourism Investments”** (*Programul pentru dezvoltarea investitiilor in turism – Masterplanul investitiilor in turism*). The program strives to encourage local authorities to invest in the tourism infrastructure, but additionally promotes the identification, evaluation and prioritization of different forms of tourism in order to create a network of tourism destinations competitive on international market (Ministerul Turismului, 2017). The program takes the two sectoral strategies into consideration; the **National Strategy for Ecotourism Development and the Master Plan** for the **Development of Balneary Tourism**.

For a better protection of natural and cultural resources of the Carpathians Mountains, Romania ratified **the Convention for the protection and sustainable development of the Carpathians**, through the Law no. 389/2006. The main goal of the convention is the cooperation among the involved parts for the protection and sustainable development of the Carpathians, improvement of life quality, consolidation of the economies of local communities and conservation of natural values and of cultural heritage (Ministerul Apelor și a Protecției Mediului, 2006).

Some other strategies are associated with the development of special forms of tourism, as for example the “**Sectorial Strategy in the field of Culture and National Patrimony”** for the period of 2014-2020 or strategies that are developed for different institutions associated with sustainable tourism (as National Parks or similar) (INCFC, Institutul Național pentru Cercetare și Formare Culturală, 2014)

4.16.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

The regional and local strategies are coordinated and issued by: (1) County Councils, (2) Local Action Groups, that are coordinating usually many communities in rural areas, (3) Associations for

Intercommunity Development, (4) Regional Development Agencies (RDA), (5) NGOs or tourism associations, (6) other public institutions like Public Direction for Culture or administration bodies of protected areas. In most cases, in the last decades, the strategies were mostly orientated to the available funding and eligible measures to be funded rather than to a realistic analysis of the current situation in the territory among other topics related to sustainable tourism.

According to the OECD "Romania: OECD Scan of Institutional Mechanism to Deliver on the SDGs" counties have developed their local sustainable development strategies and they use them in programming the EU funds allocated through regional managing authorities(OECD, 2020a). Regional and local environment action plans exist with the aim to update the planning tools on the regional and local level in the field of environmental protection. Thus, they contribute to the definition of a regional and local strategy of sustainable development". The general situation is depicted in the paragraph bellow, cited from the same study:

"From previous OECD-UCLG and from the views collected during OECD's interviews with state and non-state actors overall, local authorities lack the funding, the administrative capacity and the human competences to provide high-quality public services. This is especially the case in urban areas where services are very fragmented. Local authorities often act as spending agents on behalf of the central government, but they are not involved in decision-making. Stakeholders reported a lack of consultation with national authorities who often have limited understanding of grassroots problems. There is no practice at the local level to set priorities based on local needs or to evaluate the priorities. Currently there is no mechanism to involve systematically regions and cities in the formulation, implementation and evaluation of national plans for sustainable development. Conversely, there is no mechanism enabling the national level keeping track of the strategies developed by sub-national government and establishing a guidance/good practice inventory" (OECD, 2020a).

The tourism governance is assured at regional level by the authorities of the public administration (rural communities, municipalities and counties), with the support or in cooperation with NGOs that are playing the role of Destination Management Organizations (DMOs). Tourism strategies are developed for small local destinations, at county level, or for a cluster of counties, that are forming a regional development area, coordinated by Regional Development Agencies (RDA). The RDAs[33] are in charge with the regional planning, management of different type of EU Funding Instruments.

The National Strategy for Regional Development (*Strategia Nationala pentru Dezvoltare Regionala*) is the document that is summarizing the strategic development actions for all eight development areas. In the strategy, the tourism development is mentioned as the sixth priority for regional development. According to OECD (2020, p. 36) the eight RADs that "administer projects and programs supported by the Regional Development Fund (ERDF)" have as priority areas "to support SMEs and microenterprises which are the type of businesses most commonly found in the tourism industry". Additional to the National Strategy for Regional Development, separate development strategies are

[33] The institutional framework, the priorities and the tools of regional development policy in Romania are established by Law no. 315/2004. The eight regions were established in order to efficiently implement the regional development policy framework and are as follows: North-East, South-East, South-Muntenia, South-West Oltenia, West, North-West, Centre and Bucharest-Ilfov. (EURADA report, p. 6 / https://www.eurada.org/fileadmin/user_upload/docs/RDAs-in-Romania.pdf)

corresponding to each development region, with separate chapters that are addressing the regional tourism issues. The sustainable development of tourism is mentioned in all strategic documents, but in general without specific objectives, measures or milestones. It is more a “core value” or a “declaration of intention”.

Some RDAs have developed regional tourism strategies (RDA South-West Oltenia (ADR Sud-Vest Oltenia, 2014), (ADR Nord-Vest & Universitatea Babeș-Bolyiai, 2019) that are recognizing the important place of sustainable tourism development. For example, the most recent strategic document, the Regional Action Plan for Tourism for the NE Region 2017-2023 (*Planul Regional de Actiune pentru Turism /PRAT Nord-Est*), developed by RDA, has as the fifth goal oriented toward the “Support of sustainable tourism development”, that will be reached, among other activities, through: support for the accommodation structures in the certification with “green label”, in order to encourage them to embrace some “green” practices (organic local food, reusable energy sources, recycling a.o.); ecological campaigns for tourism areas, eco-education(ADR Nord-Est, 2017).

On county level, the tourism departments of the County Councils are in charge with the strategic development and with the implementation of sustainable tourism, in cooperation with the state agencies and with the industry. The attributes of County Councils related to tourism are stipulated in the OG nr. 58/1998 and the Law 755/2001 as follows: inventory of main tourism resources, administration of the local registers of tourism patrimony, proposals for tourism development (for the annual program of tourism development), homologation of tourism walking trails and ski slopes, contributions for the increase of the quality of tourism products, monitorization of tourism activity, organization of tourism information centers.

Tourism is approached in the general regional development strategies and, of course, in strategies developed especially for the tourism sector (tourism strategies) developed by the County Councils. A cross-cutting analysis of some tourism strategies developed before 2020 at county level reveals that sustainable tourism development is usually part of the strategy, but not necessary with a spot on this subject, or with a broad content meant to describe ways of action or precise targets. As an exception, the recent developed tourism strategies are targeting objectives and specific actions for sustainable tourism. It is the case of Constanta County, with the Integrated Strategy for Sustainable Development of Tourism in the County Constanta 2019-2028 *(Strategia Integrată de Dezvoltare Durabilă a Turismului în Judetul Constanta 2019-2028)* developed in by INCDT (2019) . The strategy is setting new perspectives, addressing the sustainable development as a long-term solution for the tourism growth. In the research undertaken with the local authorities, most of them have subordinated the ”sustainable development” to the environment protection and conservation. The strategy aims to put new bases for the creation of sustainable tourism products (p. 12), for the identification of sub-destinations that could be associated with sustainable tourism principles. (p. 17) The vision for 2028 is including the ”sustainable development principles as fundament for the future development and principles for the future sustainable tourism development are formulated” (p19). The strategy issued for Harghita County (Integrated Tourism Strategy of Harghita County for the period 2020-2027) recognises the importance of sustainable development: „for an efficient development of tourism, we need to take into consideration the need for a sustainable development, principles that are the foundation of entire economic and social evolution” (Consiliul Județean Harghita & SC Eurotop Consulting SRL, 2019).

We can assume that in the next period, taking into consideration the new evolution in Romania, regarding the sustainable development, more and more tourism strategies will include / will be subordinated to sustainability goals.

The Danube Delta plays a very important role in Romanian tourism and its specific status as a biosphere reserve requests a special attention. The ”Integrated Strategy for Sustainable Development of Danube Delta” (*Strategia integrata de dezvoltare durabila a Deltei Dunarii*) tries to solve the double challenge: to insure a proper preservation and the sustainable development of Danube Delta, of its ecological assets, but to improve in the same time the life standards of the inhabitants living there(World Bank & MDRAP, 2015). The strategy was developed in 2013 with the support of the World Bank, which, additional to the services related to the strategy development, has implemented the concept of Integrated Territorial Investment as well.

The socio-economic development strategy for Sibiu County for 2021-2030 is the key strategic policy in the field of sustainable tourism development. The document is currently under approval.

The vision of the policy states that "Sibiu County will be recognized as a model of excellence for the attention paid to the environment, the optimal living conditions for citizens and as a favorite travel destination."

Sustainable tourism and SMEs` support is addressed by two dedicated strategic objectives. The strategic objective no. 3 refers to the integrated development of tourism and culture. It focuses on improving and extending the tourist infrastructures (e.g. hiking, biking, ski, health infrastructures, cultural & natural visitor centers, cultural routes, or thematic trails). The plan promotes the development of green tourism offers and their digitalization. The actions are meant to strengthen the tourism destinations which capitalize on the diversity of landscapes and cultures, architectural heritage, events, local crafts and traditions, gastronomy, and authentic character of local communities. It is underlined that the future development of tourism activities will have to be sustainable for all forms of tourism not only ecotourism, but also cultural, mountain, gastronomic, health, rural or urban tourism.

The strategy identifies the need to prepare entrepreneurs for sustainable tourism, digital transformation, and the need to support cooperation networks. The transfer of knowledge between academia/ research centers and SMEs on sustainability is considered low, mainly due to the high degree of co-financing required under state / regional aid schemes for Research Development-Innovation (RDI) projects.

The strategic objective no. 5, smart development and capitalizing on opportunities in rural areas, is planned to offer opportunities for the tourism SMEs by supporting innovation and orientation towards green technologies, developing products and services with higher added value. The foreseen interventions are oriented to give access to markets including the internationalization of SMEs. This priority also includes support with the development of clusters and stimulating interactions between academic, research institutions and the business environment. More than that, in the organizational chart of the county council, it is planned to organize a new department in charge with SMEs.

Conservation and protection of the environment, becoming a green county is the strategic objective no. 2 and aims to improve environmental conditions (air, water, soil) by reducing pollution, expanding green spaces, securing drinking water, proper waste management, management of

protected natural areas, increasing the use of energy from renewable sources and ensuring energy efficiency, the transition to circular economy and encouraging research in the field of environment.

Connectivity with markets and accessibility are important pillars of any tourism destination. Sibiu county`s strategy specifies that increasing territorial development and connectivity between cities and rural areas, improving access to important cultural and natural sites is a key objective- ***Creating opportunities for connection no. 4***. The planned activities include a program for the development of biking routes, rehabilitation of road and railway infrastructures, construction of Sibiu metropolitan electric tram, rehabilitation, and development of the historic railway with tourist value Sibiu-Agnita-Sighișoara, park & ride facilities, electric/hybrid vehicle infrastructures, as well as learning mobility programs for citizens.

4.16.2 Key Stakeholders

The SMEs in tourism have contributed in the last three decades to the development of tourism mainly through their own resources and efforts. The stakeholders relevant for the sustainable tourism and the SMEs acting in this specific field could be structured in national, regional, local.

4.16.2.1 Governmental and semi-governmental bodies

The responsibility for supporting the development of sustainable tourism lies at local, regional and national level. Taking into consideration the complex interconnections of sustainable development of tourism (infrastructure, transportation, environment a.o.), the activities of several ministries and of governmental bodies from different fields could be considered as relevant. Still, it will refer to the bodies that have the role to inter-correlate the trans-sectorial initiatives and responsibilities, through political commitment and leadership.

The **Department for Sustainable Development (DSD)** (*Departamentul Pentru Dezvoltare Durabilă*, n.d.) was established by the Government Decision no. 313/2017 and reflects the commitment of Romanian Government for the implementation of the Romanian Sustainable Development Strategy. DSD is affiliated to the Office of the Prime Minister and is coordinated by a state counselor. The activity of the department is focused on promotion and implementation of the policies and actions and is responsible for the policy coherence in the field of sustainable development. The funding of the DSD is assured by the General Secretariat of the Government.

For the implementation, monitoring, evaluation and revision of the SNDD 2030, the **Interdepartmental Committee for Sustainable Development (ICSD)** *(Comitetul Interdepartamental pentru Dezvoltare Durabilă)* was created in 2019, through the Government Decision no. 272 (*Guvernul României*, 2019). This is an inter-institutional body, with consultative role, formed by the ministers' members governed and coordinated by the prime minister. Additional to the tasks related to monitorization, the Committee can establish specific responsibilities for the central public authorities and/or public institutions, related to the SNDD (National Strategy for Sustainable Development) and is initiating the approval of the methodologies, action plans. Another important task is related to the national indicators that are developed under the coordination of ICSD that is also submitting the Reports to the Romanian Parliament.

Consultative Council for Sustainable Development (CCSD) was established by the Government Decision no. 114/2020 and was initiated by the DSD. It includes experts that are working in 17 committees, selected from educational field, representatives of business community, social partners and civil society. CCSD is important for bridging the DSD with the society and economic environment and brings new insights in the process of the SD action plan formulation (*Consiliul Consultativ Pentru Dezvoltare Durabilă*, 2020).

Other inter-ministerial bodies are responsible for the coherence of the measures related to sustainability in the policies and strategies: the **Inter-ministerial Committee for the Coordination of the Integration of Environmental Protection Principles into Sectoral Policies and Strategies** was created in 2001 and reviewed in 2011, through the Governmental Decision no. 741/2011. The committee is responsible for policy coherence for environmental protection. From 2011 to 2017 it implemented the system for evaluation, monitoring and review of the National Strategy for Sustainable Development. Currently is led by the Ministry of the Environment, and all ministries and other relevant institutions are represented at the level of State secretary/Director/Head of institution. **Parliamentary Sub-Committee for Sustainable Development** was created in 2015 (*Departamentul Pentru Dezvoltare Durabilă*, n.d.-b).

For the policies related to tourism, the **Ministry of the Environment, Water and Forests (MEWF)** (*Ministerul Mediului, Apelor Și Pădurilor*, n.d.)and the **Ministry of Economy, Entrepreneurship and Tourism (MEEET)** (*Ministerul Economiei, Antreprenoriatului Și Turismului*, n.d.) have the responsibility, and at the same time administrative and technical capacity to implement the selected SNDD (National Strategy for Sustainable Development) (Departamentul pentru Dezvoltare Durabilă, 2020) objectives (presented at the beginning of chapter). The sustainable development appears among the main field of competences of the Ministry of Environment, Water and Forests (MEWF) together with the pollution control, quality of the environment, management of protected areas and biodiversity conservation, waste management, green economy and climate change (*Ministerul Mediului, Apelor Și Pădurilor*, n.d.). More than that, in the organizational chart of the ministry, it exists a separate department in charge with this specific topic: The Service for Sustainable Development, subordinated to the Direction Climate Change and Sustainable Development. Additional to this department, the MEWF coordinates several agencies that are indirectly responsible for the implementation of the sustainability agenda: Environment Fund Administration (*Administrația Fondului Pentru Mediu (AFM)*, 2021), National Agency for Protected Areas (*Agenția Națională Pentru Arii Naturale Protejate*, n.d.), the Administration of the Danube Delta Biosphere Reserve (ARBDD) (*Admistrația Rezervației Biosfera Delta Dunării*, n.d.), the National Agency for Environment Protection (*Agenția Națională Pentru Protecția Mediului*, n.d.). The sustainability is part of the mission of the **Ministry of Economy, Entrepreneurship and Tourism**/MEET (*Ministerul Economiei, Antreprenoriatului Și Turismului*, n.d.) is the representative of the central public authority, that applied the strategy and government program in the fields of economy, industrial policies, sustainable development, competitivity, SMEs, business environment, commerce, entrepreneurship and foreign investments in the field of tourism, in harmony with the market needs and for the stimulation of the initiative of economic operators. The mission, oriented to the sustainability principles, is reflected in the last tourism strategies presented in the previous chapter. Unfortunately, in terms of regulation and strategy implementation of sustainable tourism principles, major

improvements are needed. Despite the fact that tourism was declared as an economic priority, tourism is organized as a ministerial directorate, after repeated changes of organizational structure.

The **General Directorate for Tourism** (*Ministerul Economiei, Antreprenoriatului Și Turismului*, n.d.) is integrated in the Ministry for Economy, Entrepreneurship and Tourism. The main fields of activities are related to development and implementation of tourism strategies, promotion of Romania as a tourism destination abroad, development of tourism infrastructure, certification and quality control of tourism services providers, destination management. The General Directorate (former National Authority for Tourism) is assisted at the national level by the **Consultative Council for Tourism** (*Ministerul Economiei, Antreprenoriatului Și Turismului*, n.d.), that includes different stakeholders (professional associations, education and academic bodies, representatives of the tourism industry). The General Directorate of Tourism is represented in territory by **official representatives** that have responsibilities derived from the mission of the national authority.

4.16.2.2 Tourism Associations

In the last two decades, the tourism associations have played a major role in the development of the Romanian tourism industry, no matter if there were professional sectorial associations or destination organisations. From the entire diversity of associations, only few are directly connected with sustainable tourism. The goals associated with sustainable development of destinations were introduced as well in the last decade, but still, mostly due to the reduced number of staff, only very few organisations have sustainability departments or sustainability responsible employees.

With the exception of **Association of Ecotourism in Romania (AER)** (*AER - Asociația de Ecoturism Din România*, n.d.), which is entirely dedicated to the implementation of sustainable tourism principles (more precise of the ecotourism principles), the other national-wide representative associations are tackling the sustainable development more as an additional goal. AER played a major role in the promotion of ecotourism and of sustainable tourism in Romania and placed both forms of tourism on the strategic priorities of Romanian Tourism. AER is a partnership for nature conservation and tourism development in Romania. It brings together tourism associations, non-governmental organizations for local development and nature conservation, guesthouses and tourism agencies. The innovative concept promoted by AER is to rally the public and private sectors in a partnership for nature conservation and sustainable tourism development. The actions are focused mainly on three directions: promotion and marketing (creating and promoting a well-defined image of Romania as an international ecotourism destination); development of ecotourism services and infrastructure at the level of Eco-Destinations proposed in Romania; nature conservation and sustainable development in Romania; national press campaigns focused on the development of ecotourism in Romania; participation in national tourism fairs. AER has as well created a certification system for the tourism businesses and destinations, which is very helpful not only for a better tourist experience and for the improvement of the tourism products, but as well for the tourism SMEs, that can follow the certification process as a learning process. AER has implemented several international projects and important capacity building programs for several destinations all over Romania. (*AER - Asociația de Ecoturism Din România*, n.d.)

One of the main projects of AER, in the last years, was to define, in cooperation with the tourism national authority, the criteria for the recognition of eco-destinations, to select 10 eligible areas and

to assist them in the process of pre- and post-certification. These eco-destinations are *Baile Tusnad* and surroundings, *Tara Hategului-Retezat*, *Transylvania Highlands*, *Padurea Craiului*, *Marginimea Sibiului*, *Zarnesti-Piatra Craiului*, *Eco-Maramures, Bison Land*, *Tara Dornelor* and *Danube Delta*. The destinations are coordinated by small NGOs that are leaded by a mission orientated to a sustainable development of selected areas. All these are playing a very important role in the sustainable development of tourism in Romania.

Another organisation with national coverage is the **National Association for Rural, Ecological and Cultural Tourism (ANTREC)** (*Asociația Națională de Turism Rural, Ecologic Și Cultural Din România (ANTREC)*, n.d.). Sustainable development is an implicit goal of ANTREC in their continuously support delivered to the SMEs from rural areas. A tourism network was created, which includes small rural and agro-tourism operators. The purpose of ANTREC is to deliver support in the organization and development of rural, ecological and cultural tourism and for the continuous improvement of the tourist product. The support actions have targeted the promotion on national and international fairs, participation in the important tourist events in Romania and abroad; support for the new B&B businesses (classification and approval), training and capacity building.

Additional to these two associations, a consistent support for the SMEs from the tourism industry is offered by ANAT, FIHR and FAPT. The **National Association of Travel Agencies (ANAT)** (*ANAT - Asociația Națională a Agențiilor de Turism Din România / National Association of Romanian Travel Agencies*, n.d.) has 400 tour operators and travel agencies from Romania as members and represent their interests at regional, national and international level (*ANAT*). The associate members are tourism promotion offices, airlines, transport companies, rent-a-car, hotels and restaurants, online booking systems, insurance companies, educational institutions, foundations / tourism associations. FAPT, the **Federation of Tourist Promotion Associations** (*Federația Asociațiilor de Promovare Turistică*, n.d.) supports the development of a destination management organization in Romania and the members are regional and local tourism associations, responsible for destination management and marketing. FAPT aims to develop tourism at the national level, by coordinating tourism activities in a coherent way, serving the interests of members and promoting them nationally and internationally. FIHR – The **Romanian Hotel Industry Federation** (*Federația Industriei Hoteliere Din România (FIHR)*, n.d.), is the first tourism association, that was settled back in 1990. The main goal is to represent the interests of hotel industry in relation with public authorities, at public consultations with 24 public institutions and in Economic and Social Council (CES) and in the Coalition for Development of Romania (CDR).

4.16.2.3 NGOs, Sustainable Tourism Networks and Partnerships

The above-mentioned associations are only sporadically involved in the sustainable development of tourism, mainly through the initiatives of their members or through singular projects. An important impact in the field of sustainable tourism is played by small initiatives and associations that will be presented bellow.

The most important role is played by the **eco-destinations network** initiated by **AER** (see above). The 10 small ecotourism associations that are functioning as destination management units are coached and assisted in their activity, evolving in a surprising way over the last years, putting in place capacity building measures, promotion events, and certification schemes for the SMEs.

One example is the association **Ivan Patzaichin Milla 23** (*Rowmania*, n.d.)**,** which is active in the Danube Delta supporting the local development. Its mission is to protect the cultural and natural biodiversity of wetlands from Romania. The association offers support for SMEs and for social enterprises, offers know-how and investments in underdeveloped areas from Danube Delta and other natural parks. The principles of sustainable development were embraced by some other small-scale associations active in Transylvania in the rural area: **Mihai Eminescu Trust** (*Fundația Mihai Eminescu*, n.d.) and the **ADEPT Foundation** (*Fundația ADEPT*, n.d.). The Mihai Eminescu Trust has over 20 years' experience in rural regeneration and they have implemented community development projects. They have created a support mechanism for SMEs in rural areas for some selected villages in Transylvania, following the sustainable development principles. ADEPT foundation is a biodiversity conservation and rural development NGO and was active since 2004 in the nature and rural landscape protection, working close with farming communities. Tourism was a secondary field of activity, but they have offered remarkable support in linking economic and social benefits with biodiversity conservation. Additionally, the support delivered to the small-scale businesses, they have improved the bike infrastructure in *Tarnava Mare* area as a base for the development of sustainable tourism by realizing a 107 long mountain bike trail with cobblestone.

The association **My Transylvania** (*Asociația My Transylvanya*, n.d.) has a mission to develop communities through education and creativity, reconnecting them with residents own territory. The values of the organisation are: sustainability, connection with nature, trust, sustainable development, creativity and innovation, joy in involvement, continuous education. They are promoting small villages and alpine areas through alternative events, development programs and projects, innovative services and products.

In addition to local initiatives are the networks of professionals: mountain guides, rangers and other. The **Society of Mountain Guides and Leaders** (*Societatea Ghizilor Și Liderilor Montani*, n.d.),was established informally in 2010 on the initiative of several professionally active mountain guides for the development and improvement of the mountain guide profession according to today's international requirements.

The **Association of Administrations of Protected Natural Areas** (*Asociația Administrațiilor de Arii Naturale Protejate (AAANP)*, n.d.) aims to improve the collaboration between the administrations of protected natural areas, the conservation of nature and biodiversity, the promotion of sustainable development and the assurance of the financial sustainability of the protected areas. The association is involved in promoting and supporting the values of national natural capital and cultural values, carrying out protection and conservation programs, common communication actions, public awareness and ecological education in protected natural areas, as well as at national level.

The **Romanian Rangers Association** (*Asociația Rangerilor Din România (ARR)*, n.d.), was founded in 1996 on the initiative of a group of representatives of non-governmental organizations whose main object of activity is the protection of natural heritage. Their objectives are attestation and formalization of the ranger profession; raising the professional standard of rangers in Romania; promoting the goals and strategy of global nature conservation; development of qualified and competent human resources for the management of protected areas; public awareness and education for the conservation of natural resources; encouraging and supporting professional exchanges between rangers.

4.16.2.4 Relevant research and educational bodies

The Directorate for Tourism (former ministry or national authority) was assisted over the years by INCDT, the **National Institute for Research and Development of Tourism** (*Institutul Naţional de Cercetare - Dezvoltare În Turism – INCDT*, n.d.), that is subordinated to the tourism authority. The Institute is responsible for theoretical studies and applied research of public and national interest related to the development and promotion of Romanian tourism. Among several projects implemented by INCDT a large part was directly connected to sustainable tourism. INCDT was involved, in cooperation with AER, in the development of the Romanian Ecotourism Strategy. Another important public organization is the **Danube Delta National Institute for Research and Development** (*Institutul Național de Cercetare Dezvoltare "Delta Dunării,"* n.d.). Despite the fact that the main field of activity lies in the field of wetlands, wild species and natural habitats, the Department of Biodiversity Conservation and Sustainable Use of Natural Resources has a team responsible for Human communities and ecotourism. Professional studies and analyses are done as well by international organizations, that have a charter in Romania (as WWF for example) or by organizations that are donors or mediators in the funding process (as Environment Partnership Foundation).

The research in tourism and sustainable development is mostly enriched by the research centers and departments that the Romanian universities have. Most of the tourism study programs have an affiliated research center that is in charge with empirical research and vocational training in tourism: the **Academic Center for Research in Tourism and Services** (**CACTUS**, *Centrul Academic de Cercetări În Turism Și Servicii*, n.d.) affiliated to the Academy of Economic Studies (Bucharest), the **Center for Research and Entrepreneurship in Tourism and Hospitality** (**CeCATO**, *Centrul de Cercetare Și Antreprenoriat În Turism Și Ospitalitate*, n.d.), affiliated to the Faculty for Business (*Cluj Napoca*), the **GREEN UVT – Sustainability Center** (*Centrul de Sustenabilitate Green UVT*, n.d.), affiliated to the West University (*Timisoara*), the **Center for Research and Competences in Tourism** (**CERC Tour**, *Centrul de Resurse Și Cercetări În Turism*, n.d.) and the University Stefan cel Mare (*Suceava*).

Additional to these, a limited number of private bodies have competences and activities in the field of tourism and sustainability. **ProPark** (*Fundația Pentru Arii Protejate*, n.d.) for example is an important capacity building provider for protected areas and conservation. Their mission is to improve the competencies of the people involved directly or indirectly in the management of protected areas to aid the better conservation and cultural heritage.

4.16.2.5 Individual tourism business and destinations of particular relevance

According to Mazilu (2018), Romania, *"in terms of tourism, its sustainable development, the Danube Strategy, becomes a permanent attraction point both regionally and competitively at a cross-border international level, a touristic destination that can compete with the other Danube river countries. Especially, there are tourists who want to discover new places, to get into new, wild, less accessible places, and, as a general trend, to enjoy special travel experiences".* This remarkable destination presents a very sensitive natural area and the sustainability should be a continuous goal in all the fields.

Regarding the individual tourism businesses, the AER certified companies are best practice examples. One business, for example, placed in the Danube Delta is an accommodation structure, named "**Casa**

dintre Salcii" Guesthouse (*Casa Dintre Salcii*, n.d.). The company runs a guesthouse and is organising soft adventure and nature discovery tours. The employees are locals and the building style is respecting the local cultural landscape, being nicely integrated in the natural environment. Another example promoting sustainable tourism activities is **Vila Hermani** (*Villa Hermani*, n.d.), situated in *Magura*, in the eco-destination *Piatra Craiului* National Park (*Parcul Național Piatra Craiului*, n.d.). It is a family-owned business and the services are combining accommodation with tours in nature, soft adventure, thus nature/culture discovery tours. The guesthouse is using green energy sources and the food is local. The tours are combining walking with nature observation and interpretation. The team initiates or contributes to cleaning up actions in the village and surroundings and are promoters of sustainable tourism.

Sibiu Hiking Years (2021-2022) program is a destination management policy with a financial mechanism put in place by Sibiu County Council and implemented by Sibiu County Tourism Association (*Asociația Județeană de Turism Sibiu*, n.d.) for the recovery and relaunch of sustainable tourism. The main objectives are to: (1) improve soft mobility, connectivity and quality of green infrastructures (hiking & biking trails and thematic routes); (2) empower public-private cooperation at local and county levels to implement a common work plan for sustainable tourism development; (3) upskilling policymakers and tourism entrepreneurs to preserve the integrity and valorize the natural environment and the cultural assets; (4) foster support to the private stakeholders to develop quality experiences and ecotourism products, adapted to new customer needs and markets; (5) increase digitalization and digital marketing; (6) empowering health and well-being during/ after covid-19.

Transylvanian Highlands (*Colinele Transilvaniei*, n.d.) is part of ecotourism destinations network Discover Eco-Romania (*Eco-România*, n.d.). The initiative is an outcome of the Natura 2000 management plan for an area of international ecosystem relevance and the largest protected area in Romania after the Danube Delta.

Coordination is performed by an advisory tourism board with representatives of the 11 partners from the fields of tourism, culture, environment and rural development: Mioritics Association (*Asociația Mioritics*, n.d.), Sibiu County Tourism Association (*Asociația Județeană de Turism Sibiu*, n.d.), ADEPT Transilvania Foundation (*Fundația ADEPT*, n.d.), Mihai Eminescu Trust Foundation (*Fundația Mihai Eminescu*, n.d.), Monumentum Association (*Asociația MONUMENTUM*, n.d.), WWF Romania (*WWF România*, n.d.), Asociația My Transylvanya (*Asociația My Transylvanya*, n.d.), LAG Dealurile Târnavelor (*Asociația Grupul de Acțiune Locală Dealurile Tîrnavelor*, n.d.), LAG Microregiunea Hârtibaciu (*Grupul de Acţiune Locală Microregiunea Hârtibaciu*, n.d.), LAG Podisul Mediaşului (*Grupul de Acțiune Locală Podișul Mediașului*, n.d.), LAG Asociația Transilvană Brașov Nord (*Grupul de Acțiune Locală Asociaţiei Transilvane Braşov Nord*, n.d.), Fortified Churches Foundation (*Fundația Biserici Fortificate*, n.d.).

The Destination Management Unit provides capacity building activities for 75 SMEs to become more sustainable: online discussion group, networking meetings, study visits, trainings, and individual assistance. All members approve the quality chart of the destination and comply with the minimum of ecotourism criteria of the Eco-Romania certification system. Three guesthouses and a provider of horse-riding tours are officially certified. In 2020 the management unit submitted the application to

be recognized as eco-tourism destination by a national commission formed by representatives of the Ministry of Economy, Entrepreneurship and Tourism.

4.16.3 Activities and instruments for the development of sustainable tourism

4.16.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

The project "The Development of the Sustainable Tourism in Romania" *(Dezvoltarea turismului durabil în România)* was implemented by AER (*AER - Asociația de Ecoturism Din România*, n.d.). It began in May 2018 and ended in February 2021 and was financed by the German Environment Foundation. The main objectives of the project were: Strengthening the sustainability aspects of the tourism business and tourist destinations; the development of tools and skills on sustainability assessment and strengthening sustainability awareness in the tourism industry in Romania; awareness of potential Romanian or foreign tourists about the impact of their decisions. Some of the results of the project were: training of 22 evaluators within the Eco-Romania certification system; mentoring for 28 tourist boarding houses to improve sustainability performances; identifying together with a team of international experts the most appropriate certification systems in sustainable tourism for large tourist destinations (Green Destinations) and large accommodation units (TourCert); Sibiu and Oradea tourist destinations have entered the self-assessment process according to the Green Destinations certification system; a new visual identity was created for the ecotourism promotion campaign under the name Discover Eco-Romania; notoriety for Discover Eco-Romania was increased through advertorials and advertisements in the brochures of tourism fairs; etc.

Mihai Eminescu Trust (*Fundația Mihai Eminescu*, n.d.) has been active for 20 years in developing and implementing policies for sustainable rural communities (*Viscri*, *Criț*, *Biertan*, *Alma Vii*, *Mălâncrav*). The sustainable village program, *Whole Village***,** integrates three types of actions: (1) restoration of cultural heritage, (2) development of local entrepreneurial capacity and community engagement (3) development of sustainable tourism, by promoting rural heritage and cultural landscape, hiking trails, traditional (restored) guest houses, organic food and the unique experience of village life.

My Transylvania (*Asociația My Transylvanya*, n.d.) developes communities through education and creativity by reconnecting them with their territory. The association designs new business models for community-based tourism with the aim to bring positive impact of tourism on local communities. It provides expertise to the tourism SMEs for the development of high-quality tourism experiences based on innovative use of heritage and facilitating the use of digital distribution channels (e.g. Mastercard project). **Hay Hut Country** (*Țara Colibelor – Ecoturism În Munții Cindrel Și Lotru*, n.d.) is their most recent project. Its purpose is to transform former sheepfolds into accommodation units, contributing to saving the mountain landscape and the pastoral heritage through ecotourism and slow food.

Hosman Durabil (*Moara Veche Hosman*, n.d.) manages the *Cultural barn*, a meeting hub for stakeholders invested in preserving the cultural landscape, the local lifestyle, and the high natural value of the Nature 2000 site, the *Hârtibaciu* Valley. *Hosman Durabil* coordinates the quality label Made in *Hârtibaciu* (*Din Hârtibaciu*, *cu drag*) for small tourism service providers, artisans and food producers. Members have access to trainings and new marketplaces. Priority is given to upskilling

women and educating young people from poor rural communities to become economically and digitally independent, and to change their lifestyle. A set of key principles as a framework towards a sustainable development of the area was elaborated to guide the local famers to take responsible actions for biodiversity preservation.

4.16.3.2 Marketing and information services supporting sustainability in tourism

The marketing and information services in support of sustainable tourism development are scarce. The concept is used widely but there is no real understanding of its complexity and importance yet. The newsletters issued by AER and other eco-destinations are promoting best practices, campaigns and are contributing to the promotion of the specific activities.

The campaigns organised by the Department for Sustainable Development have a rather low impact, being circulated in a small circle.

A good visibility have had projects such as "**Rowmania"** , "**Transylvania Brunch**" or other initiatives of the association like 'My Transylvania"(*Asociația My Transylvanya*, n.d.) or "Ivan Patzaichin Mila 23"(*Rowmania*, n.d.), which are not "speaking loud" about sustainable tourism, but they make "the sustainability" possible. The increased interest and participation to such events proved that the people, tourists and media are sensible to this subject, and willing to involve themselves as participants or volunteers.

In regard to marketing research, the actions are as well quite singular. The monitorisation of tourism motivation, of tourism circulation was coordinated by AER for some selected destinations. The situation should definitively be improved.

4.16.3.3 Tourism Sustainability Certification Systems and Awards

The **Ecotourism Certification Scheme** is provided by AER for destinations, guesthouses and tour operators (*AER - Asociația de Ecoturism Din România*, n.d.). The criteria for the certification scheme were formulated taking into consideration the European Ecological Tourism Labeling Standard (EETLS) and Global Sustainable Tourism Council (GSTC) principles.

This set of criteria for eco-destinations has been elaborated based on the National Strategy of Ecotourism Development in Romania. There are certain requirements that a touristic destination must meet before receiving the certification: attractivity, accessibility, a minimum level of touristic services, minimum level of public services, the evidence of a sustainable management, legal compliance, staff formation, client satisfaction, marketing, infrastructure, performance, natural environment protection, maximization of socio-economic benefits for the residents, maximization of benefits for the cultural heritage and environment and minimizing the negative effects.

The European EcoLabel is used at a reduced scale. In 2011 only five SMEs were using the label for their own products and services (Avia & Braila, 2011) and according to Cismaru L. (2018) only 2 hotels were certified in 2018 (Cismaru, 2018).

In the last years, **Green Destination certification** was introduced in Romania and popularized. The system has chances to become more used in the future time by eco-tourism or by "classic" destinations in their effort to become more sustainable.

Sibiu local breakfast program was developed by SCTA within Sibiu European Region of Gastronomy 2019 to promote the region's gastronomic identity, improve the quality of the tourism offers to encourage local supply chains and cross-sectoral cooperation (*Asociația Județeană de Turism Sibiu*, n.d.). The program is based on an assessment chart, which guides the breakfast providers (hotels, restaurants) and assesses their compliance with five categories of criteria: 1) breakfast content, quality, diversity and balance of products and dishes, 2) sustainability measures (e.g. no plastic pledge, food safety and food waste measures, eco-friendly recipients for takeaway breakfast) 3) communication based on storytelling and staff involvement 4) relation with the destination ecosystem 59 monitoring the visitors` satisfaction. More than 40 businesses are currently coached.

4.16.3.4 Capacity Building for Sustainable Tourism

In the last two decades the capacity building was assured mainly with the support of foreign technical organizations as the **GIZ** (*Deutsche Gesellschaft Für Internationale Zusammenarbeit*, n.d.)**, USAID** (*United States Agency for International Development*, n.d.)**, SWISS Cooperation Agency** (*Swiss Agency for Development and Cooperation*, n.d.) or other international organizations as **Nature Friends International** (*Naturefriends International - NFI*, n.d.) or **WWF** (*World Wild Life*, n.d.) , that have acted on narrow subjects related to sustainability or in limited areas. As well, an important contribution was constituted by the international projects that have combined different tools as training, development of learning materials, support for destinations and SMEs, consolidation of networks in the industry (See Instrument, Erasmus+ Key Action 2, Horizon 2020, GEF-The Global Environment Facility). Also, technical assistance was offered on the request of Romanian Government by WTO and World Bank in development of national or regional tourism strategies. UNDP supported the implementation of the Agenda 21 and has delivered expertise at the local level. An important contribution was made in the last decade by **the Romanian American Foundation** (*Romanian-American Foundation- RAF*, n.d.) to the certification of eco-destinations, under the coordination of AER – Association of Ecotourism from Romania. AER invested resources in the creation of a Network of Eco-destination that are coached and assisted on the run. AER offered support at microlevel as well, through several training and coaching programs in ecotourism, delivered to the SMEs from the industry.

Recently, at national level the Department for Sustainable Development is mobilizing the stakeholders and is spreading the knowledge related to sustainable development through conferences, networks, webinars, and competitions. As well, new NGOs are involved in the promotion of SD goals and targets.

The Embassy of Sustainability (*Ambasada Sustenabilității În România*, n.d.) in Bucharest promotes sustainability and the development of specific skills, programs, and partnerships between entities in the business environment, civil society, and the public sector in Romania, to align with the 2030 Agenda and achieve the objectives of sustainable development. **SustainAbility Schoo**l (*Ambasada Sustenabilității În România*, n.d.) is a training program on sustainability topics. The discussions take place online and facilitate the transfer of know-how on sustainability issues between the members of the coalition, Romanian and foreign specialists from the private, public, and non-profit sectors. The initiative "**Sustainability Ambassadors"** promotes monthly the outstanding contributions made to

the Sustainable Development Goals by the representatives of the business, academic, non-governmental or public departments.

The coalition Sustainable Romania (*Departamentul Pentru Dezvoltare Durabilă*, n.d.-b) is a collaboration platform for responsible companies, NGOs, and communities whose aim is that all relevant SDGs and targets are monitored and measured. Five working groups are addressing major so called "emergency areas of intervention" in: food waste, air quality, solidarity, responsible and transparent companies.

Visitor Plus developed the Recycling Map (*Harta Reciclării*, n.d.), an interactive and collaborative platform that allows the identification of selective collection points for recyclable waste. The purpose of this tool is to promote the reduction, reuse, and recycling of all types of waste, from paper, plastic and metal to household appliances or hazardous waste. Tourism SMEs especially from mountain and remote areas have thus access to alternative collection points for recyclable waste.

Food Waste Combat organizes workshops for companies about the ecological footprint of food, climate change and sustainability (*Food Waste Combat*, n.d.).

Sibiu County Tourism Association (SCTA) continues the implementation of various initiatives which aim at supporting SMEs to become more competitive and sustainable: guidelines for building authentic accommodation units, workshops about ecotourism and sustainable tourism, an annual forum promoting networking and collaboration opportunities, annual thematic programs as European Region of Gastronomy 2019 or Sibiu Hiking Years 2021-2022 (*Asociația Județeană de Turism Sibiu*, n.d.).

WWF Romania has been working since 2006 to protect and promote biodiversity as a major asset for the sustainable development of local communities. In its communication WWF underlines the need to update, implement and monitor improvements of national and regional policies (WWF, 2020), the development of green business networks in tourism destinations like Transylvanian Highlands or Mountain Banat.

4.16.3.5 Financial Support for SMEs in regard to sustainable tourism activities

The main sources for EU funding for the Romanian tourism SMEs in the 2021-2027 will become available through the Operational Programs and the Recovery and Resilience Plan.

The **Association of the Associations for Regional Development from Romania** (*Asociația Agențiilor Pentru Dezvoltare Regională Din România - ROREG*, n.d.) issues a monthly publication(www.roreg.ro.) with all active funding sources through governmental and EU funding or from other private donors. The financial support regards (a) development of new activities in rural areas: camping and similar accommodation, leisure and food activities, digitalization and investments for environmental protection The National Program for Rural Development 2014-2020, measures 6.2 and 6.4), (b) ecological and digital transitions (Horizon, SME Transform), (c) energy efficiency and circular economy (SEE and Norway Grants), (d) capitalization and business development (IMM Invest Romania, Romania Investment Partners) (ROREG, n.d.).

ROREG gathers the 8 Regional Development Agencies (RDA) which are the managing authorities for the **Regional Operational Programs** (ROP 2021-2027). RDAs have experience in drafting regional

strategies and implementing EU funded programs to support sustainable tourism and SMEs competitiveness. The ROP 2021-2027 will finance the SMEs trough two axis: (1) *A competitive region through innovation and dynamic SMEs for a smart economy* will finance clusters and incubators for the transfer of technologies; (2) *A digital region* axis will finance digital hubs and the digitalization of the SMEs.

The Romanian Recovery and Resilience Plan (European Commission. Directorate General for Communication., 2021) is structured around six pillars, three of them are supposed to finance SMEs and green tourism destinations: (1) the green transition support measures for energy efficient buildings, the circular economy, and the sustainable transport; (3) smart and sustainable growth, component 9- *digital and technological transformation of 3000 SMEs* (4) social and territorial cohesion, component 11- *15 green tourism destinations certified*.

The Environment Fund Administration provides financial support through national programs like *the Green House* to increase the energy efficiency of buildings and home appliances, to reduce greenhouse gas emissions in transport through the purchase of electric and / or hybrid cars(*Administrația Fondului Pentru Mediu (AFM)*, 2021).

The European Commission created an **online guide** (*Guide on EU Funding for Tourism. Internal Market, Industry, Entrepreneurship and SMEs*, n.d.) highlighting the different types of EU funding opportunities for the tourism sector with a focus on programs about sustainable tourism, competitiveness, research and innovation, digital and crisis recovery.

4.16.4 Summary and conclusion on national situation

4.16.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

The **National Strategy for Sustainable Development of Romania, Horizons 2013-2020-2030 (SNDD)** (*Strategia pentru Dezvoltarea Durabila a Romaniei. Orizonturi 2013-2020-2030*) is a proof of the Romania's commitment for the implementation of United Nations Agenda 2030, in all sectorial politics related to the national sustainable development. Tourism will be an important part, and the recent tourism regional strategies are showing that the sustainable development will be the main perspective in the future development plans of tourism industry (Departamentul pentru Dezvoltare Durabilă, 2020). Also, SNDD describe tourism as a priority, with future plans as the *opening of the Carpathian Sustainable Tourism Centre Romania, under the Carpathian Sustainable Tourism Platform* (*Carpathian Sustainable Tourism Center*, n.d.). The RDAs and county administrations will develop their local strategies that will serve as well as education / dissemination tools for the SMEs. Still, for bringing the SMEs from tourism industry to act and work in a sustainable way it is a long course to make, but should be an important point on the future agenda.

4.16.4.2 Challenges for the development of sustainable tourism and for SMEs

The main course of action will be, on the scientific, practical and decision-making field, to define and put in place a strong commitment regarding the goals for the sustainable development of tourism. According to the OECD Report (OECD, 2020, p. 52) it is needed:

- To build capacity and skills to strengthen data collection, management, storage and reporting process;
- To strengthen the capacity and awareness of the need for conducting regulatory impact assessment;
- To establish a mechanism to ensure compatibility between local and national indicators of sustainable development strategies
- To build capacity and skills to strengthen data collection, management, storage and reporting process;
- To consider establishing a regulation to standardize the use of data related to sustainable development throughout policy making processes.

Sustainability is part of all regional tourism strategies. The acknowledgement of the necessity for the sustainable development in tourism is a big plus. There are unfortunately gaps related to the lack of coherent, concrete measures, indicators and action plans that are offering enough information of SMEs, in order to gain their commitment. According to OECD Report (2020), these gaps include "historical fragmentation between the line ministries and between the ministries and the Centre of Government. In addition to low robustness of performance management and deficient data transfer between institutions, the organisational culture is reacting to crisis and specific problem-solving rather that proactively forecast strategic action".
Another study (Bodosca, 2018) showed that the way in which the issue of sustainable development has been addressed at regional level shows that the roles of central and territorial administration have not been well defined and consequently there are poor chances for the next period to provide growth, new jobs, environmental protection of natural resources and the involvement of the local community in the whole process.

4.16.4.3 Prospects and challenges with regard to the (post-) COVID-19 situation

The crisis is still present in the life of SMEs and the main preoccupations will be directed to survival resources and measures. In the recovery stage, the SMEs will acknowledge that it is important to respect all the resources and to embrace sustainable tourism practices. The struggling of tourism SMEs for surviving will be in the future years on the first place.

4.16.4.4 Recommendations for boosting Sustainable tourism for SMEs

Alliances of knowledge and best practices are very important and showed in the past years great effects. As well, will be needed coaching support in the implementation of sustainable development principles. Furthermore, industry feedback suggested (OECD, 2020) that "there is an interest from businesses to have high-performing DMOs that respond to the following specific needs". Some valuable actions were collected by the international experts in their effort to operationalize the Destination Management Organisations in Romania (OECD, 2020b), that can also be used as well for boosting sustainable tourism:

- Provide a trusted institution for advice;
- Provide knowledge and support for accessing/catalysing funds for tourism development on national and European level and in conducting feasibility analysis and solid business plans of projects.

- Establish common objectives, define a common mission, and design platforms for education in the field of sustainable tourism in the destination;
- Develop closer alignment and integration between the regional efforts to promote sustainable tourism through the strategy and the SMEs actions and offers;
- Organise training to strengthen tourism human resources.

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4.17 Russia

Maria Gordeyeva, Elena Seredina and Anton Mosalev
(As of July 2021)

4.17.1 Political framework for Sustainable Tourism

4.17.1.1 National Sustainable Tourism Policies and Strategies

The fundamental documents defining sustainable tourism policy in the Russian Federation are as follows:

The Constitution of the Russian Federation defines the Russian Federation as a social state, aimed at creating conditions that ensure dignified life and free human development (Article 7) and land and other natural resources are used and protected as the basis of life and activities of the people living there (Article 9) (Constitution, 2020).

The Federal Law On Basics of Tourist Activity states that the state recognizes tourism as one of the priority sectors of the economy, presents an idea of the country favourable for tourism (Article 3), regulates Russia's international cooperation in the field and defines such issues of sustainable tourism as "social tourism" and "individual tourism". Also, this law defines the provisions for the classification of hotels, ski slopes and beaches (The Federal Law On Basics of Tourist Activity, 1996).

The Federal Law On Natural Medicinal Resources, Medical and Recreational Areas and Resorts regulates relations in the study, use, development and protection of natural medicinal resources, medical and recreational areas and resorts on the territory of the Russian Federation, determines the status of a health resort or a federal medicinal area, regional or local significance, maintains a register of medical and recreational areas (The Federal Law On Natural Medicinal Resources, Medical and Recreational Areas and Resorts, 1995).

The Federal Law On Specially Protected Natural Areas defines the categories of specially protected natural areas (PAs), principles for organizing PAs, regulation of land and urban planning relations in PAs (construction permits and environmental impact assessment), visiting procedure, protection regime, zoning of protected areas, activities related to scientific research, monitoring of the natural environment, environmental education and environmental education in tourism. Furthermore, it defines the tasks of national parks including the creation of conditions for regulated tourism and recreation (The Federal Law On Specially Protected Natural Areas, 1995).

The Federal Law On Environmental Protection establishes the principles of environmental protection, natural assets and their categories, determines the powers of state authorities related to environmental protection, the rights and obligations of citizens in the field of environmental protection, a system of state measures to ensure the rights to a favorable environment and economic regulation in the field of environmental protection environment. In addition, the law defines natural objects under special protection and establishes a legal regime for protection (The Federal Law On Environmental Protection, 2001).

Sustainable tourism is defined in the framework of several National Standards of the Russian Federation. They define goals, tourist services and the basic requirements for their organization. The

provisions of the standards also include definitions of ecological routes and trails, classification of ecotourism, as well as the basic requirements for the provision of ecological tourism services. Certain issues of regulating relations with SMEs, as well as creation of tourist products and the organization of the use of tourist resources are regulated by National Standards on tourist services provided in specially protected areas and social tourism services. The National Standards of the Russian

Federation dealing with sustainable tourism are listed below:

- “National standard of the Russian Federation R 56642-2015. Tourist services. Ecological tourism. General requirements."
- "National standard of the Russian Federation R 57286-2016. Social tourism services. Travel services for the elderly. General requirements.”
- "National standard of the Russian Federation 32613-2014. Interstate standard. Tourist services. Tourism services for people with disabilities. General requirements."
- "National standard of the Russian Federation R 57287-2016. National standard of the Russian Federation. Tourist services provided in specially protected natural areas. Requirements."
- "National standard of the Russian Federation R 57806-2017. Tourist services in the field of individual tourism. General requirements.”

The Concept of the transition of the Russian Federation to sustainable development was adopted in 1996 and **The Environmental Doctrine of the Russian Federation** was adopted in 2002. Both acts contain the basic principles of sustainable development, but they, to a great extent, remain declarative documents, their adoption did not contribute to the development of specific legal norms in this area (The Concept of the transition of the Russian Federation to sustainable development, 1996 and The Environmental Doctrine of the Russian Federation, 2002))

The Fundamentals of State Policy in the Field of Environmental Development of Russia for the Period up to 2030 was put into action **on** April 30, 2012. The strategic goal of the environmental policy of the Russian Federation stated in this document reflects both the need to preserve and restore natural ecosystems, as well as the sustainable development of the society, and an increase in the quality of life of people due to the maintenance of a high quality of the environment (The Fundamentals of State Policy in the Field of Environmental Development of Russia for the Period up to 2030, 2012).

In order to increase the sustainable development of the tourism industry, the **Strategy for the Development of Tourism in the Russian Federation until 2035** was developed, which was approved by the order of the Government of the Russian Federation dated September 20, 2019. It defines such concepts as "rural tourism", "development plan and management of a tourist destination", "ecological capacity of the tourist destination " and "ecological pressure on a tourist destination." (Federal Agency for Tourism, 2021)

In addition, **The Ministerial programme of digital transformation of Rustourism for 2021-2023** was also adopted to foster the development of sustainable tourism.

These documents pave the way to the transition to a sustainable tourism model in Russia, which encompasses synthesis of tourism, culture and ecology, in order to ensure their long-term sustainable development by creating conditions for complementary interaction between investors,

tourism and social initiatives (The Ministerial programme of digital transformation of Rustourism for 2021-2023, 2021).

In order to create demand for sustainable tourist products, Russia is aiming at promoting domestic tourism, liberalizing visa formalities, stimulating the consumption of Russian tourist products and increasing their availability, in particular, through the state programme for subsidizing travel within Russia. Within the framework of the programme, tourists receive a cashback of 20% of the cost of the trip if they pay for it using Russian national payment system.

In November 2020, **the Federal Agency for Tourism (Russiatourism)** initiated the **National Project Tourism and the Hospitality Industry** which includes three 3 federal projects (The National Project Tourism and the Hospitality Industry, 2021):

- Development of tourism infrastructure and the creation of high-quality tourism products
- Increase in the availability and awareness of tourism products
- Improvement of management efficiency in the field tourism

Currently, tourism in Russia, and sustainable tourism in particular, develops mainly due to the state support. This trend is quite important for sustainable tourism SMEs initiatives when tourism infrastructure is created by the state and regional sustainable tourism initiatives are made more accessible for tourists. The second important source for sustainable tourism comes from public-private partnerships. This trend is gaining momentum in the Russian regions. For example, Sochi-Krasnaya Polyana protected area was developed this way. At the same time, smaller regional projects also get funds for their development, e.g. the construction of a ski centre in Golubino in the Arkhangelsk region, the Golden City International Tourist Complex in the Tula Region, the construction of the Goncharov Park Hotel in the Polotnyany Zavod estate in the Kaluga Region, and many others. Additional impetus for sustainable tourism is given by private funds of local businesspeople (SMEs) and travel companies.

Legislation related to protected areas and resorts

Protected areas are part of the Ministry of Natural Resources and the Environment of the Russian Federation which exercises state management in the field of organization and functioning of specially protected natural areas of federal significance. An Expert Council for Specially Protected Natural Areas under the Russian Ministry of Natural Resources and the Environment has been established within the Ministry. Its purpose is to develop proposals and recommendations to ensure decision-making on strategic issues in the development of the system of specially protected natural areas in the Russian Federation.

The Ministry of Natural Resources and the Federal Tourism Agency are currently developing a legislative framework for ecological tourism in specially protected natural areas. It is necessary to develop rules for its organization, as well as a list of objects that can be erected on protected lands for tourism purposes. The main purpose of the proposals of the Ministry of Natural Resources is to introduce the concept of "ecological tourism" into legal use. But its definition has provoked heated debates with the environmentalists who fear the increasing flow of uncontrolled tourism, which will have a detrimental effect on ecosystems. Therefore, the law is still being discussed.

In addition to the **Federal Law On Specially Protected Natural Areas** (The Federal Law On Specially Protected Natural Areas, 1995), there are regional laws on protected areas adopted by all the regions of Russia. Each region is not only granted the right to create specially protected natural areas of regional or local significance on its territory, but it is also encouraged to have laws on protected areas. They are quite similar to the federal law, but there may be slight differences according to the given natural features of the territory.

A good example of regional laws is the **Law of the Primorsky Region On Specially Protected Natural Areas**, adopted in 2005 (amended on March 2, 2021). Having a lot of reserves and national parks, the law introduces a special category of protected areas – "a zone of rest", a territory (water area) of particular importance for the preservation or restoration of natural complexes, within which certain types of economic activity are prohibited or heavily regulated (permanently or temporarily) (The Law of the Primorsky Region On Specially Protected Natural Areas, 2005).

The Law of the Krasnoyarsk Region, for example, introduces micro-reserves in the category of protected areas (The Law of the Krasnoyarsk Region On Specially Protected Natural Areas, 2005).

4.17.2 Key Stakeholders

4.17.2.1 Governmental and semi-governmental bodies

The main governmental body defining the tourism industry in Russia is **the Federal Agency for Tourism** (**Russiatourism**) (est. in 2008) headed by Zarina Doguzova. It is a federal executive body responsible for the development and implementation of state policy and legal regulation in the field of tourism and tourism activities. It also coordinates activities for the implementation of the national priority projects. It also acts as a regulator of sustainable tourism responsible for supporting sustainable tourism initiatives and incorporating them in an overall national tourism strategy. Since June 2021, the Federal Agency for Tourism left the Ministry of Economic Development and became an independent structure under the direct supervision of the Russian government which indicates the importance that the federal leadership attaches to tourism by granting direct access to bigger funds and resources.

Ministry of Natural Resources and the Environment (est. in 2008) is a federal executive body responsible for the development of state policy and legal regulation in the field of environmental protection and protection of natural resources. The Ministry of Natural Resources and the Environment of the Russian Federation exercises state administration in the field of organization and functioning of specially protected natural areas of federal significance. One of the most important projects run by the Ministry is the federal project "Ecology" (2019-2024) which is aimed at state environmental monitoring, assessment of the quality of the urban environment and natural resources. One of the special focuses of the project is ecological improvement of water bodies, including the Volga River, and preservation of unique water systems, including lakes Baikal and Teletskoye; conservation of biological diversity, including the creation of at least 24 new specially protected natural areas (The Federal Project "Ecology" (2019-2024), 2018).

4.17.2.2 Tourism Associations

The Russian Union of Travel Industry (*RST*) (est. in 1993) is the largest industry association which has more than 3000 members, including tour operators, travel agencies, hotels, health resorts, transport, educational institutions, media, public and other organizations in the field of tourism. RST is a member of the World Tourism Organization (*UNWTO*), the Chamber of Commerce of the Russian Federation and the Russian Union of Entrepreneurs, which is the All-Russian public organization of small and medium-sized businesses called *Opora Rossii*. The main tasks of the RST are to promote a balanced market and responsible tourism, as well as to increase the competitiveness of the national tourism products and services. RST structure includes 16 regional offices and 11 regional representatives, 40 committees and commissions. In addition, the RST includes 19 professional associations. The most important mission for RST is to work out a strategic vision for tourism, bring together businesspeople (especially SME) and activate potential of Russian regions, that's why there are a lot of regional professional associations among its members. A good example is the Association of Kamchatka Tourism Industry which focuses on sustainable tourism model as a way to develop tourism in the region and stand out among other Russian regions.

The Committee for the Development of Sustainable Tourism of the Russian Union of Travel Industry (est. in 2020) is the main advisory and consultative body established within the framework of RST to address the needs of sustainable tourism. The main duties of the Committee are to increase the social responsibility of businesses in tourism, and to promote responsible travel. The Committee is chaired by Viktoria Saar who runs her own environmental educational projects *Anthill* and *World Ecoparks* (the latter project was launched only in April 2021).

In 2017, the state authorities of 10 regions of the Russian Federation established an association for economic co-operation of the Russian regions called **The Union for the Development of Tourism in the Russian Federation**. Its goal is to develop domestic and inbound tourism, build interregional integration and accelerate the socio-economic development of the regions, and support enterprises (especially SMEs) in the tourism industry. The Union assists in attracting financial resources and investments for the development of tourism, creating special economic instruments to support the industry in the regions. It also deals with issues of financing SMEs by defining terms of loans for businesses, budget financing, as well as working with investment funds on the basis of the Order of the Government of the Russian Federation No. 1764 dated 30.12.2018 (The Order of the Government of the Russian Federation No. 1764, 2018).

Also, the association deals with the following issues of sustainable tourism:

- Drafting laws in the interests of the development of the tourism industry
- Participation in the development of federal targeted programmes for the development of tourism activities
- Involvement of the expert community in working out solutions on topical issues of regional organizations and enterprises of the tourism industry
- organization of research in the interests of the regional tourism industry
- Involvement of expert opinion in projects of regional enterprises in the field of the tourism industry
- Involvement of the federal media in regional topical issues

The Association of Tour Operators of the Russian Federation (*ATOR*) (est. in 2017) puts one of its priorities to promote the development of responsible, sustainable and universally accessible tourism in the Russian Federation as a condition for a decent life and free development of a person in a social state, a decisive factor in the quality of life of citizens, as well as a privileged means of their individual and collective improvement.
Associations and unions in the field of ecology, social tourism, youth and children's tourism develop strategies for sustainable tourism in a specific territory with the help of SMEs, and are also involved in the development of recommendations, as well as public discussion, together with representatives of SMEs, regulatory initiatives of state and regional authorities.

Ecological Tourism Association (*ETA*) (est. in 2001) provides assistance in promoting international principles of sustainable and ecological tourism in Russia, development of ecological tourism in the system of Russian specially protected natural areas and implementation of projects to preserve the country's cultural and natural heritage. The idea of establishing the Ecological Tourism Association was put forward by the non-governmental organization (*NGO*) Ecotourism Development Fund "Dersu Uzala" and with financial support from The United States Agency for International Development (*USAID*) and The World Wide Fund for Nature (*WWF*) and supported by the Ministry of Natural Resources of the Russian Federation and the Association is the Russian Union of Travel Industry. The Association runs multiple environmental projects through involvement of civil activists and eco-tourists (Ecotourism Development Fund "Dersu Uzala", n.d.).

One of the ongoing projects of the Association is the Ecocamp **Help the Izdrevaya River**. It's an initiative in Siberia focusing on the creation of water protection zones and coastal protection zones of the river, proceeding by launching an eco-trail *Wonderful Dubrava* and an eco-trail *White Taiga*, as well as creating an Ecopark of the Owl House in the Izdrevaya valley in Siberia. The initiative is funded by a local business community (Kolevatova, 2021).

Social Tourism Development Association (*STDA*) (est. in 2015) creates projects for the development of social tourism for children, the elderly and the disabled. All STDA programmes are created by professionals in healthcare, education, culture, tourism, and other fields. The mission of the Association is to create an effective information and methodological portal of the project *Tourism for citizens of the older generation 60+,* aimed at the development of social tourism for the elderly. The programme is based on a combination of cultural, cognitive, and health-improving aspects in organizing travel around Russia for older people, their participation in practical exercises and master classes as well as the opportunity to acquire new knowledge and skills.

The projects **Educating the Lecturers** and **Lessons in Russian towns** are the major ongoing projects of this Association. *Educating the Lecturers* was launched in 2017 and has gained popularity since then, resulting in a contest for the best lecturer and more than 300 people trained at the School of Lecturers on the issues of cultural heritage protection only in 2021. The project *Lessons in Russian towns* creates a system of continuous education for children in the context of the development of domestic tourism programmes on the territory of the Russian Federation together with authorities, representatives of the education system, the travel industry and businesses.
Location: all regions of the Russian Federation

The Russian Tourist Association **The World without Borders** (est. in 2005) is a professional association set up by the largest tour operators for inbound and outbound tourism operating in Asia. The association's employees conduct analytical research in the development of sustainable tourism in Asia and stimulate the activities of tourism companies (The World without Borders, n.d.).

Union of Responsible Tourism (*URT*) (est. in 2016) brings together expert practitioners who work on the territory of the Russian Federation and the CIS countries and use the principles of social responsibility in tourism and responsible tourism in their activities. URT helps all participants in the travel industry to create a real product of responsible tourism with a multiplier effect and an integrated approach. It also provides assistance in the development and implementation of programmes and projects in the field tourism destinations' development.

The Beresta project of URT aims at preserving an old Russian culture of writing on Birch bark and popularizing this tradition through designer earthenware cups with birch bark, thus creating jobs for the local residents and the visually impaired by developing ceramic production in Russia (Location: Velikii Novgorod)

4.17.2.3 NGOs, Sustainable Tourism Networks and Partnerships

Green Building Council (est. in 2009) is a non-profit organization established on the basis of a voluntary association of legal entities and citizens in order to represent professional interests and to achieve socially useful goals. In fact, it is an association of professionals to promote and implement the rules and regulations of green building in practice. The Council actively lobbies for green building ideas at the government level and encourages implementation of eco-standards and sustainable building technologies in all spheres of development of territories.

The non-profit charity foundation **Regional Centre for Wildlife Conservation** (Moscow) (est. in 1992) deals with environmental problems in Russia and CIS countries. It develops and implements environmental projects, provides support to environmental initiatives, nature reserves, national parks and other protected natural areas and develops mechanisms for charitable financing of wildlife protection.

Two projects include *The March of Parks*, which is an annual international action of public support for specially protected natural areas held since 1995 in Russia, Ukraine, Belarus, Armenia and the Central Asian states. *The March of Parks* in 2021 was devoted to protection of water reserves. The project is comprised of an annual series of roundtables and press conferences, festivals and concerts, excursions and ecological programmes about nature conservation. Another ongoing project by the Centre is the online national information and reference system *Protected Areas of Russia* which is federal electronic resource presenting information on all state nature reserves and national parks (Location: all regions of Russia).

The non-profit organisation **International Centre for Responsible Tourism** (est. in 2016) is an online platform that helps regions to promote themselves through dissemination of best practices, building awareness of destinations and projects of responsible tourism, including presentation of international best practices, providing assistance in organizing scientific and educational events for students and leading Russian experts in the field of tourism.

The Centre runs its own initiative “Help by travelling!” which is a media project aimed at building awareness of local businesses, small destinations and crafts. The project has a series of events, exhibitions and conferences to bring small businesses together from different regions of Russia (Location: all regions of Russia).

The National Trail (est. in 2017) is an autonomous non-profit organization aimed at creating a national system of eco-trails that will create the necessary prerequisites for sustainability in tourism. The project is aimed at initiating legislative changes and development of a universal methodology for creating a system of national priority areas (from design to operation) with approbation in pilot territories. The project will develop a legal basis for the creation of such a system in Russia, including the rules for the provision of land plots for the arrangement of trails and related infrastructure. The main activities of “The National Trails” involve formation of the structure and ideology of the System of National Trails in the Russian Federation, route planning of different types of national trails (recreational, historical, scientific), as well as creation and maintenance of an up-to-date publicly available database of existing or emerging Regional and National Trails.

Ecotourism Development Foundation Dersu Uzala (est. in 1998) is a Russian nongovernmental organization within the framework of environmental projects of the American Agency for International Development (USAID) and the World Wildlife Fund (WWF) with the support of the Russian branch of the International Union for Conservation of Nature (IUCN) and the Centre for Business Cooperation of the Citizens for Democracy (CSD). The NGO specializes in projects of ecotourism and environmental protection, it organizes ecological tours for nature lovers in national parks and buffer zones of reserves across Russia. The Foundation develops strategies, programmes and business plans for the development of ecological tourism in all regions of Russia.

4.17.2.4 Relevant research and educational bodies

The Centre for Ecological Travel (*CET*) (est. in 1998) is a research centre set up and run by a group of graduates from the Moscow State University. It operates with the support of Moscow State University, which remains the leading university in sustainable tourism research, and Centre for Wildlife Conservation (Moscow), under the patronage of the State Committee for the Environment of the Russian Federation. The mission of the Centre is to draw the attention of Russian and foreign public organizations and foundations to existing problems in those places where they run research programmes and projects aimed at solving environmental problems and preserve biodiversity.

Projects are connected with organizing tours to national reserves and carrying out research programmes to create an interactive map of Russian Conservation and biodiversity. For example, the *Green Network* project (2010 – present) is a volunteer movement in protected areas initiated by the Centre for Ecological Travel. It has a lot of smaller initiatives within its framework and one of them is an eco-camp set up in July 2021 in the natural sanctuary to repair and maintain the existing ecological paths, as well as to create a new ecological trail in the protected zone (Location: Kirov region).

The **School for Responsible Tourism** (est. in 2020) is an educational platform aiming at combining traditional tourism with innovative practices. There are quite a few tours in Moscow, seminars, and online lectures that are interesting for both local residents and tourists. Besides, there are intensive educational modules to introduce sustainable tourism practices in the regions of Russia. This

programme targets tour operators, guides, owners of tourist venues and organizers of tourism activities. It was launched by a digital project ExploRussia.

The educational programme is comprised of 3 modules. The first one is devoted to sustainable tourism principles, the second one is focused on the best local practices and presented by the businesspeople who are currently running such projects in Russian regions, the third one gives advice on how to design a tourist product, which is done with offering supervision and feedback from the coaches to the participants. The latest intensive course was held in Buryatiya in May 2021.

4.17.2.5 Individual tourism business and destinations of particular relevance

Altourism (est. in 2014) is a project that helps tourists to get to know Russia, learn crafts and improve life in villages. It's focused on support to social entrepreneurs and the development of social entrepreneurship in Russia. The mission of the project is to share practical knowledge and the best tools in the field of social entrepreneurship. The project was launched by Ekaterina Zatuliveter, the concept is to send tourists to Russian regions to help local residents improve and develop their territory. From 2015 to 2017, Altourism organized 40 trips to the villages of Kaluga, Smolensk, Yaroslavl, Arkhangelsk regions. The project works only with those territories in which the local community is really ready for changes. Over the next three years, about 30 more trips took place. The main goal is to combine tourist experience with sustainable development of a given destination. During the pandemic, the authors of the project launched an artisan accelerator to help those who create something authentic to make a commercially successful product. The idea is to popularize the crafts, give them a utilitarian focus, and bring them to a new, modern level. One of the most interesting projects is **The Nezavalinka project**, which was launched in 2020, and it is a training course on the development of small areas (Altourism, n.d.). Another group of initiatives are closely connected with an attempt to move towards sustainable tourism through very local projects involving tourists in addressing the needs of the locals, for example, **Lake district tour** (August 2020), eco-technology festival Mira (June 2021) and others.

En + Group is the largest company in the Baikal region and a leading producer of aluminum and electricity in Russia. It has a national reputation for implementing the principles of sustainable development in many areas of its activity. En + Group also has extensive experience in environmental projects. The programmes for the development of ecological tourism in the territories of presence are incorporated into the social policy of the company. The company funds and runs the **Big Baikal Trail** project together with the same-named association, which manages a hiking trail located on the territory of the Pribaikalsky National Park on the shore of Lake Baikal from the village of Listvyanka to the village of Bolshoye Goloustnoye. The company has invested almost 4 million rubles in the implementation of the project.

Russian Expeditions (est. in 2010) is a travel agency specialized in organizing individual tours to the most unusual places in Russia and in the world that are endangered. Wildlife sightings, encounters with traditional culture and unique historical heritage sites are the main priorities in the company's activities. Tourists are involved in exploring the most remote routes and regions of the country without disturbing the natural microclimate and environment. The tourists are introduced to the practices of responsible travel and learn about the most unusual parts of Russia and the world (Location: The Altai mountains, Caucasus, Kol'skii peninsula)

Farm M2 (est. in 2020) is the first organic diversified farm in Russia. The farm was started as a family business aimed at finding proper use of empty land and now it has 4,500 hectares of its own land in the Moscow region. The work of the farm is aimed at the cultivation and production of organic products, as well as the development of ecotourism. The project combines organic production with tourism services and accommodation for tourists who come to explore organic farming.

Kamatahostel (est. in 2019) is a guest house in Kamata settlement in the mountains at an altitude of 1380 meters above sea level. It was founded by Sergey Seleznev. The Kamatahostel team provides tourists not only with accommodation, but also one-day or several-day excursions across North Ossetia (Taisaev, V., 2019). There are family and children's tours because the project is aimed at lower income tourists. It targets low- and middle-income segments making it available for family travel. There are two main forms of entertainment - one-day hikes without backpacks, or two- or three-day routes. There are also plans to make Kamatahostel accessible to people with disabilities.

Usadba Tri A (est in 2006) is a cheese dairy with guest houses. It is a manor created in the Altai Territory by the family: Alexander Kokorin, Alla Roenko and Alena Kolosova. On the territory of the estate there are six wooden houses, a cheese dairy, a swimming pool and playgrounds. Guests are offered natural food, cheese tastings, meeting local artisans and eco-excursions.

Maly Turysh village (est.in 2013) was reborn thanks to Guzel Sanzhapova's efforts and her local apiary. She has conducted five successful crowdfunding campaigns, including financing the construction of a cultural centre in the village, and leading business publications to write about honey and berries from the Urals. Guzel Sanzhapova's collaboration with online platform ExploRussia initiated the tourism development of Maly Turysh. The tour operator organized the arrival of the first group of foreign tourists to the village. Now a successful rural start-up and ExploRussia are creating a cross-sectoral collaboration, unique for Russia, based on the values of sustainable tourism (Location: Ekaterinburg region')

Izborskiy Gingerbread workshop (est. in 2012) is the first workshop of handicraft printed gingerbread in the Pskov region, created on the initiative of Tatyana Musatova. It is located in the Izborsk Valley, a hiking trail and a craft workshop popular among tourists. Workshop "Izborskiy Gingerbread" opened a new style in printed gingerbread, thereby reviving a very peculiar tradition of craft in the Pskov region. The workshop is one of the best gingerbread brands in Russia brought back to life due to cooperation between the local businesspeople, enthusiasts of the craft and the tourists.

Yangan-Tau Geopark (est. in 2019) is the first UNESCO-certified geopark in Russia. The Geopark unites 35 geological sites, several ethnographic museums, various educational initiatives and research opportunities. Geopark is to preserve the tangible and intangible heritage and culture of the local population. It aims to increase the tourist flow for the economic development of the region by actively engaging with the local communities. The Geopark has several small family businesses on its territory.

4.17.3 Activities and instruments for the development of sustainable tourism

4.17.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

The International online Forum Sustainable Tourism (first held in 2020) is the first national platform to consolidate efforts in sustainable tourism. It was launched by The Committee for the Development of Sustainable Tourism of the Russian Union of Travel Industry. The programme of the Forum is built around four themes: "Stable economy and development of territories", "Increasing the social responsibility of the tourist business", "Tourism protecting the environment" and "Global trends in tourism."

The Festival of Eco and Rural Tourism *Green Wind* (est. in 2020) is a unique festival dedicated to a new lifestyle and responsible consumption concepts. A parallel event of the VII All-Russian is the festival of nature *Primordial Russia*. It provides an exhibition-catalog of 50 successful examples of environmental practices and principles of sustainable development in Russia including objects of socially responsible and natural educational tourism, recommended by the Federal Agency for Tourism of the Russian Federation and the Agency for Tourism Development of different regions of the RF. Tourist services are provided by specially protected Natural Areas.

Tour operators approved by the expert council for the protected areas of Baikal, Altai, Kamchatka, the Kuril and Commander Islands, the Far East, the Putorana plateau, Taimyr, Sayan, Yakutia, Chukotka, Karelia, the Russian North, Central Russia (The Festival of Eco and Rural Tourism Green Wind, 2020).

4.17.3.2 Marketing and information services supporting sustainability in tourism

ExploRussia (est. in 2012) is a successful start-up by Anna Mikheikina, Olga Sitnik and Ruslan Betz. It started as a travel agency specializing in individual tours for those foreigners who want to communicate with locals and understand Russia. Their guides are local residents and enthusiasts throughout Russia who know their region. Now they work with quite a few sustainable tourism start-ups giving them a chance to gain publicity and find tourists. One of the main tasks of the project is to support the Russian local economy, culture, and environment. When organizing operations, it is done on the principles of sustainable tourism.

Informational Portal on Russian Eco Tourism (est. in 2020) is dedicated to tourism on specially protected natural areas (PAs) of federal significance. Every person can choose a region, category of the route (hiking, water, mountain, cycling, etc.) and its complexity (family, children, sports, etc.) and get full information on preserve, national park or wildlife sanctuary. The Portal is supported by the Ministry of Natural Resources and Environment as domestic ecological tourism is one of the priority areas of the national project *Ecology*.

Be in Russia (est. in 2016) is an online platform to promote tourism and coordinate events in Russian regions. It addresses the problem of bringing forward Russian regional initiatives, including those in sustainable tourism, activates potential of local business and unites professionals in tourism, regional authorities, representatives of convention and exhibition bureaus and event organizers. It presents an effective opportunity for representatives of the sustainable tourism projects from the regions to build awareness of their products and establish business contacts. Within the framework of the

platform there is an initiative Regional Workshops (2016 – present) which is a regular expert forum to bring together local businesspeople, local authorities and representatives of tour agencies. In April 2021 the Workshop was devoted to Tumen's regional tourist potential and sustainable tourism initiatives on protected areas of the region were part of the programme. The workshops will furthermore take place in the loactions of: Sochi area, Krasnoyarsk, Vladivostok, Moscow, Voronezh, Ekaterinburg, Saint-Petersburg and Moscow.

Sustainable Tourism Made Easy (est. in 2020) is an educational online platform that aims to make sustainable tourism a common practice among tour operators, accommodation providers and tourism destinations around the world. We want to achieve it by providing tourism professionals with necessary knowledge, tools and solutions to implement sustainable practices in the easiest and most time-efficient way. Sustainable Tourism Made Easy is a member of the Global Sustainable Tourism Council. Inside the platform there is a special division called Sustainable Tourism Academy for practitioners that offers a variety of courses on the topic of environmental and social responsibility and sustainable tourism management. The course introduces the world's best practices and internationally recognized standards in sustainable tourism. The Committee for the Development of Sustainable Tourism of the Russian Union of Travel Industry supports this initiative and promotes it. *Sustainability management for tour operators* is the major course currently offered in Russian. It was launched in January 2021 and attracted more than 800 participants from all over Russia. It was attended by managers of hotels in Russian resorts, such as Krasnaya Polyana, niche regional tour operators, travel agents and representatives of tourist destinations who want to improve their environmental friendliness and social responsibility. The course lasts 10 weeks and is comprised of offline and online activities including an extensive e-library on sustainability and best world practices.

Online Eco-educational project *Anthill* (est. in 2019) is a digital platform aimed at incorporating sustainability into the management concepts of eco-hotels and glampings. The project was launched with an eco-festival *Anthill* which aimed at new ecological thinking in children and adults. The team of the project offers educational sessions, tailored services and advice on the management concept for hotels and destinations throughout Russia and human resource solutions.

S7 Airlines (est. in 1992) is the largest private airline in Russia. In 2017 an independent German non-profit organization *Atmosfair*, which specializes in evaluation of greenhouse gases emitted by aircraft, estimated greenhouse gas emissions of more than 200 airlines around the world. S7 Airlines took 20th place in the ranking and became the only Russian airline to make it into the top 50 of the list. S7 Airlines launched the Green Steps educational programme, which teaches ethical and sustainable travel. The programme is part of the company's sustainable development strategy. The Green Steps partner is the *Now It is Done This Way* project of sustainable consumption. Lessons are made part of the company's app and cover topics such as the impact of tourism on local communities and the environment, the basics of sustainable consumption and planning ethical travel. At the end of each lesson, users are presented with a test to check their knowledge. For successful completion of the test, the airline credits 50 miles to the loyalty card account. Other eco-initiatives of S7 Airlines include reducing the use of plastic and disposable items on board aircraft and in offices, as well as large-scale projects to protect the environment. For example, in 2019, S7 Airlines organized a

fundraiser initiative to restore Siberian forests after the fires that went to planting 1 million new trees in Siberia.

City of Discoveries (est. in 2021) is a developmental tourism and local initiative launched by Moscow Tourism Committee which aims at developing responsible consumption in children. They study Moscow best practices in ecology, urban development, and energy consumption. At the end of the programme participants present their own projects on one of the issues discussed in the previous modules.

4.17.3.3 Tourism Sustainability Certification Systems and Awards

The Russian Federation applies international system of certification in tourism, being a member of UNWTO and UNESCO Global Geoparks initiative. In 2020 the first Russian Geopark Yangan-Tau was certified by UNESCO and became the first geopark in Russia and in the entire post-Soviet territory by fully complying to all the criteria of UNESCO certification system. Several other national parks are being currently developed to be certified by UNESCO Global Geoparks initiative. At the same time, since sustainable tourism has been made one of priorities in the "Strategy for the Development of Tourism in the Russian Federation until 2035", the autonomous non-profit organization "Russian Quality System" together with The Federal Agency for Tourism (Russiatourism) and The Russian Union of Travel Industry (RST) have begun working on an integrated approach to certification of the sustainable tourism in Russia. Currently, certification in tourism remains voluntary and, in many cases, it's initiated in order to increase competitiveness and attract customers.

Ecotourism services certification is performed according to *The National Standard of the Russian Federation R 56642-2015* Tourist services. Ecological tourism. General requirements". Following the Standard, the main goal of ecotourism is visiting natural areas in order to protect the environment and encourage rational use of natural resources. The Standard also sets strict requirements for the way a tour is organized in protected areas, for the educational aspect of them and demands that organization of the routes is done in such a way as to ensure the preservation of natural resources. An integral part of certification is the environmental management standard ISO 14001 (EMS), created in 1991 by the International Association for Standardization. Russia has adopted almost all of its principles in the national environmental management system

"The **National Standard of the Russian Federation R ISO 14001-2016** is an environmental management system including requirements with guidance for use": It is aimed at maintaining stability, ensuring environmental safety and the possibility of sustainable social and economic development of the organization.

The Government of the Russian Federation has established annual awards for the best social tourism project, the best innovative project in the field of tourism and so on. One of the most reputable annual environmental awards is given by Non-governmental Environmental Foundation named after V.I. Vernadsky.

A few years ago, the Federal Agency for Tourism (Russiatourism) jointly with the Ministry of Culture of the Russian Federation initiated a number of professional contests and as a result, a number of regional tourist initiatives received financial support. Among them there were some projects closely related to sustainable tourism. In 2016 the project "Green Ring of Russia" aimed at creating a

network of local environmental and craft centres near Russian UNESCO World Heritage sites (Kizhi, Baikal, Altai, Kamchatka, Putorana Plateau, Sakhalin, etc.) became the winner and received substantial financial support. Another winner in 2016 was “The Golden Ring 2.0” project, the goal of which was to update service standards in the cities of the Golden Ring in order to meet modern requirements for environmental protection and sustainable tourism. In 2017, several projects were recognized as the winners, one of them was the ethnocultural tourist complex "Kazachya Zaimka" (the Baikal area) which aims at preservation and giving tourists an experience of traditional Cossack lifestyle, another project was an educational complex for children with disabilities "Primorskoye ring" (the Far East) and others. In 2020, one of the winners was the sustainable tourism project for the national park "Shushensky Bor" in the Krasnoyarsk area, which is based on the engagement of the local community. A recreation centre for the tourists with disabilities "Visiting Khiisi" in Karelia became another winner, in a few years’ time it will be developed in an inclusive tourist cluster that can be used for rehabilitation, and professional education.

4.17.4 Summary and conclusion on national situation

4.17.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Russia is making the first steps towards sustainable tourism. It started developing its system of SMEs as a vital element of a new sustainable tourism model, but this process is not only uneven and very often dependent on proper financing and state funding, but also requires the willingness of the local communities to change their attitude to life and heritage. Russia follows an approach that sustainable tourism products should be socially meaningful, eco-friendly, economically profitable and satisfy the demands of consumers. In the long-run, sustainability is not only an ethical, but also a business necessity and many businesspeople working with SMEs recognize that meeting the standards and adhering to the principles of sustainable tourism adds to their reputation and success.
Many national parks have significant areas with rural settlements (for example, the national park "Russian North") or small towns (for example, the city of Spas-Klepiki in Meshchersky park within the Ryazan region). SMEs can promote activities to involve the local population in the work of the park. There are quite a few successful examples of this - in Shorsky, Taganaysky, Zyuratkul, Krasnoyarsk pillars, in the Baikal reserves - local residents are engaged in SMEs servicing tourist centres and providing accommodation for tourists. Local residents arrange guest houses, routes and excursions, folklore, folk crafts and crafts, etc. Tourism training courses are provided by the government. In addition, centres of folk crafts are being created in national parks, as production associations of small businesses for souvenir products, crafts or environmentally friendly (which is now in great demand) agricultural products.

4.17.4.2 Challenges for the development of sustainable tourism and for SMEs

There are only few opportunities for employment in many tourists’ destinations, reserves and national parks, in this regard the biggest challenge is to engage the local population in local small business start-ups through the development of rural tourism, the creation of ethnographic centres and other projects. Over the past 10 years of Central Russia and the Russian North, non-profit organizations have been actively created and developed at reserves and national parks (Association

Club of Friends of the Kenozersky National Park, NP *Club of Friends of the National Park Smolenskoe Poozerie*, Public Councils of National Parks *Chikoy*, *Kislovodsky*, and others), helping PAs to establish contact with the local population and local authorities. The essence of the projects is to stimulate and support the initiatives of local NGOs, authorities, associations of activists aimed at the development of sustainable tourism in different regions of Russia in cooperation with protected areas.

Another big obstacle to the development of sustainable tourism is the lack of investment in the infrastructure of the regions where tourist flows are on the rise, which results in overtourism and deterioration of the tourist destinations.

4.17.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

Currently, the main task of the authorities and the Federal Agency for Tourism (Russiatourism) , in particular, is to preserve the the industry, the number of which has sharply decreased as a result of the pandemic, and, thus, save the tourism industry and the market. The difficult economic situation after COVID-19 opened up great opportunities for the growth of domestic tourism in Russia. Russian citizens are currently forced to explore their own country and many of them have developed a real taste for it.

The pandemic showed how adaptive and creative the travel industry can be. The most impressive change over the past couple of years is the scope of digitalization of tourist services and experiences. There has been a considerable shift in tourists' priorities recently: fewer and fewer tourists want to be just consumers; it is getting important for them to be involved in a useful and important process. A new generation of tourist pays attention to the stability system built in the proposed holiday destination. Recent surveys confirm that fact: 60 to 70% of tourists aged 18 to 35 and 46% of respondents aged 35 to 55 answer that the hotel's sustainability is extremely important for them.

4.17.4.4 Recommendations for boosting Sustainable Tourism for SMEs

One of the first recommendations is not only to increase financing of sustainable tourism projects, but also to make it steady and long-lasting. Financing of Russian national parks by the Ministry of Natural Resources of Russia began in 2019 within the framework of the federal project "Conservation of biological diversity and development of ecological tourism" of the national project "Ecology" 2019-2024.

Sustainable tourism is a cross-industry phenomenon that encourages players to collaborate. One initiative may involve a tour operator, local industries, cultural institutions, public organizations and so on. All of them contribute to the unique image of the destination and bring additional value to their client.

Another recommendation concerns development of territories inhabited by indigenous peoples, sustainable tourism can help preserve the ethnographic component of their cultures.

Russia also needs a federal law on recreational use of natural resources, which should regulate, among other things, the touristic use of lands of different categories and create opportunities to construct tourist infrastructure on principles of sustainability.

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4.18 Slovakia

Vanda Marakova
(As of August 2021)

4.18.1 Political framework for Sustainable Tourism

4.18.1.1 National Sustainable Tourism Policies and Strategies

Today, there are no doubts about the significance of SMEs in national economies. In the Slovak Republic, SMEs represent almost 99.9% of all businesses. They provide approximately 72% of private sector jobs for the active labour force and almost 60% of jobs in the whole economy. They contribute by more than 50% to the added value created.

The majority of SMEs represent micro enterprises that hire a small number of employees; they are often categorized as a family-owned businesses or "one-man show" enterprises owned by a private individual. Changes in the Slovak business environment are reflected in the quantitative characteristics of the SME sector. In 2012, for the first time, the Slovak Statistical Office recorded a decline in the total number of SMEs. This historic drop (year-to-year by 0.7%, which amounts to 4,000 entities) may be associated with lower growth of the Slovak economy, low household consumption, as well as with insufficient steps taken to improve the conditions for doing business.

Regarding this situation, it is necessary to underline that it is mostly SMEs, and especially the new ones, that continue to create jobs and thus contribute to Europe's recovery from the economic crisis. Based on EC data it amounts to approximately four million new jobs yearly.

From the business standpoint, Slovakia's situation may be characterized by three key points:

1. Low competitiveness

Slovakia is less competitive and has a less positive business environment when compared globally to other countries, which focus their efforts on improving their status quo. Slovakia is mostly stagnating in its approach to competitiveness, which is exemplified by several international rankings, for example 'Doing Business' by the World Bank or the Annual SBA Report assessing the country's SBA implementation. It has been approximately ten years since Slovakia was recognized as the "Tatra Tiger" in terms of concrete steps towards an improved business environment. Since then, not many progressive measures related to improving competitiveness have been taken. If we focus on the above-mentioned topic of preference between employment and entrepreneurship, in Slovakia the percentage is fairly below the EU average.

According to the World Bank's ranking of global competitiveness, it is necessary to point out a sad fact, that only two out of the ten best performing countries are EU member states (Denmark and the United Kingdom).

2. Decline of SMEs

The long-term decline of SMEs, caused predominantly by the economic crisis, is also the outcome of inadequate attention paid by leaders. Here are a few examples:

As a result of external economic impacts and low competitiveness, SMEs are recently recording a reduction in their profitability. Overall, only 56% of SMEs (legal entities) achieve positive economic results, while in the category of micro enterprises it is even less.

In addition, compared with the pre-crisis year of 2008, the average number of those employed in SMEs is lower by nearly 46,000.

Another issue is size reshuffling; between the years 2008 and 2012 there was a drop by 51% in the number of small and medium-sized enterprises. This means that due to elementary problems, Slovak SMEs have only limited space for expansion, business development, implementation of innovations, and the ability to increase the number of employees.

3. Slow implementation of the EC's agenda

The slow implementation of the SBA and the Entrepreneurship 2020 Action Plan into national policies influences the state of business environment in Slovakia as well. According to the 2012 SBA Fact Sheet, Slovakia ranked below the EU average in applying the SBA recommendations. There was only one area out of ten in which Slovakia performed better than the EU average (which was using the benefits of the Single Market)

What is Slovakia missing to become a prosperous economy?

It is primarily a business-friendly environment in which both start-ups and experienced entrepreneurs would benefit from a wide range of instruments to support their business ideas. Such an environment could also provide an opportunity for identified marginalized groups (women, seniors, youth, migrants, and handicapped) to participate in entrepreneurial activity. Failure in business should be perceived as an opportunity for repeated market entry and not automatically understood as a failure.

Secondly, the effective implementation of the regulatory impact assessment system, including the introduction of the so-called SME test might diminish the regulatory burden and cut red tape.

Moreover, entrepreneurship should be accepted as a relevant career choice and receive support in the educational process. Building entrepreneurial competencies at a young age might be utilized by both entrepreneurs as well as employees at a later stage.

Finally, the efficient introduction of electronic communication between the public and private sectors would help lower the cost of sharing mandatory information for private businesses and also for the public sector when providing services to its customers.

Is a happy end coming?

In the last 20 years, the Slovak business environment experienced more ad hoc reforms than systematic improvement.

The new EU multiannual financial framework for 2014-2020 offers Slovakia a chance to support SMEs via a number of financial and non-financial instruments (loans, equity funding, regulatory impact assessment system implementation, mentoring services, incentives for marginalized groups, start-up promotion, one-stop-shop solutions, etc.) as defined in the national Operational Programs. This might be the time to formulate a clear SME strategy, a special Act on SMEs, utilizing the best EU and international practices in a long-term framework that would also accelerate the fulfilment of key SBA recommendations. (Slovak Business Agency, 2021)

A new ***Strategy for Sustainable Tourism Development until 2030*** is at present under development. The Government's tourism policy focuses mainly on seasonal disparities by creating comprehensive tourism products with sustainable utilizing of the country's potential and increasing the economic growth of regions as well as improving the visibility and positioning of Slovakia as an attractive and authentic destination. Partial aims contain (draft of the Ministry of Transport and Construction of the Slovak Republic, 2020):

- *Education*, which aims to enhance vocational training and lifelong learning; support the life-long learning of the business sector; motivate graduates to retain/ return to the national labour market; expand education in creative industries and stimulate the availability of job opportunities for all.
- *Service quality*, which seeks to determine the requirement for the quality of services, increases the quality of tourism products and support innovations.
- *Integrated marketing communication of the country as a tourism destination*, which aims to present natural and cultural resources using modern technologies and online marketing tools; promote regional and national tourism products and to increase the competitiveness of Slovakia as a tourism destination.
- *International cooperation*, which aims to promote international and cross-border cooperation and to promote cooperation in third markets.
- *Statistical data*, which seeks to obtain accurate, up-to-date data about the tourism market and benefit from new sources of statistical data (big data).
- *Destination management*, which aims to support tourism infrastructure, support sustainable transport, adaptation to climate change and protection of natural and cultural resources; sustainable use of resources in less developed regions and digitization of tourism resources.
- *Cooperation in the protection and cultivation of natural and cultural resources*, which seeks to support sustainable urban development as part of urban and rural tourism; restoration of natural and cultural resources; support for community and voluntary programmes; support for environmental production and consumption of tourism services and the creation of green jobs.
- *Accessible tourism*, which aims to strengthen the inclusiveness and accessibility of tourism; to integrate marginalized groups into the provision and consumption of tourism services and improve the employment of workforce with disabilities in tourism.
- *Regional development is driven by internal resources*, which seeks to improve the competitiveness of regional products; networking of destinations and reducing administrative barriers for businesses.

Slovakia 2030 (also known as a *Vision and strategy of Slovakia's development until 2030*) is the basic implementation document for meeting the national priorities of the 2030 Agenda for Sustainable Development. Therefore, we can consider this document content as the **National implementation of SDGs** (Ministry of Investments, Regional Development and Informatization of the Slovak Republic, 2020). The document is based on six national priorities for the implementation of the 2030 Agenda (Education for a life in dignity; Transformation towards a knowledge-based and environmentally sustainable economy in the face of changing demography and global context; Poverty reduction and social inclusion; Sustainable settlements, regions and landscape in the face of climate change; Rule of

law, democracy and security; Good health) which are integrated into three development programmes: (1) protection and development of resources, (2) sustainable use of natural resources and (3) community development. Tourism is explicitly part of the following development programmes´ objectives and sub-objectives:

(1.5) *Ensure effective and sustainable management of natural resources:* (1) Ensure the protection, restoration and enhancement of natural resources, including ensuring the stability and health of ecosystems and their services, reflect adaptation and mitigation measures on the adverse effects of climate change in all sectoral strategy documents and municipal and regional development documents as an overriding public interest (e.g. transport planning, in energy, spatial planning, water management, agriculture, forestry, sustainable tourism, general landscape care and others).

(1.6) *Ensure effective and sustainable management of cultural resources:* (*3*) To increase the competitiveness of the Slovak Republic in tourism – to improve the attractiveness of cultural heritage sites more and to strengthen their interconnection to sustainable cultural tourism services.

(2.1) *Support the development of strong innovation-based regional economies:* (5) Support the development of the cultural and creative industries, in particular in relation to increasing added value in agriculture, industry and sustainable tourism; (7) To build resilience to climate change by developing new products using ICT support, processes and services in the sector of agriculture, industry or sustainable tourism.

(2.3) *Improve the sustainability and resilience of national and regional economies:* (8) Maximize domestic demand for products and services through our regional production, especially in the areas of food production, energy and services, including sustainable tourism and agriculture; (9) Support the development of sustainable tourism, in particular nature tourism and eco-tourism.

(3.3) *Ensure the availability and sustainability of quality, modern and efficient infrastructure, services and housing for a healthy and fulfilling community life:* To support the physical and social accessibility of advanced digital networks. Digital infrastructure should be one of the tools that can significantly contribute to the scope and quality of services, for example in tourism.

The vision of **Envirostrategy 2030** (also known as a *Strategy of the Environmental Policy of the Slovak Republic until 2030 - Greener Slovakia*) is to achieve better environmental quality and sustainable circulation of the economy, which is based on rigorous protection of environmental compartments and minimizing the usage of non-renewable natural resources and hazardous substances as possible, which will lead to an improvement in health of the population. Environmental protection and sustainable consumption will be part of the general awareness of policymakers but of the population as well. Through the adaptation to climate change, the consequences will be as mitigated as possible in Slovakia. In Envirostrategy, tourism is directly part of the objective (13) Environmental education and learning for people of all ages:

(13.3) *Improving Environmental Awareness Through Tourism oriented on Cultural and Natural Heritage:* Soft forms of tourism with low impact on nature can help the population's environmental awareness and also represent a source of nature conservation revenue. The acquired knowledge of nature conservation and biodiversity will contribute to greater interest in improving the current state. The ways on how tourism could contribute via payments for services that come from landscape management will be examined. Support, maintenance and use of exhibition and museum

premises, open air museums, objects of cultural and natural heritage, environmental education centres, nature schools, forest schools to raise awareness of the natural and cultural values of the area will increase. Geoparks will be developed in a sustainable manner according to the approved and valid geopark building government concept. The aim is to increase the attractiveness of tourism and to introduce new elements. By establishing nature trails with the themes of nature conservation, forestry and geology, but also global environmental education, expert advice will be promoted.

The document also states that in order to improve the state of environment, it is also necessary to improve institutional cooperation. In the field of agriculture and forestry, there remains a lack of clarity between the protection of habitats of protected areas, which is the responsibility of the Ministry of Environment of the Slovak Republic, and the economic use of forests, which is the responsibility of the Ministry of Agriculture and Rural Development of the Slovak Republic. Protecting biodiversity and promoting ecotourism should be a priority in protected areas (Ministry of Environment of the Slovak Republic, 2019).

The most relevant policies that affect SMEs in Slovakia are Tourism Support Act, Act on Tours and Business Conditions of Travel Agencies and Act on the Consumer Protection in Tourism. The government contributes financially and economically to the development of tourism, mainly on the basis of **Tourism Support Act** (2010) (Act no. 91/2010 on the Support of Tourism - *Zákon o podpore cestovného ruchu*). The Tourism Support Act regulates tourism development financing, including local and regional tourism organizations (*destination management organizations – DMOs*) receive co-funding support from the state budget. There are currently 38 local DMOs and 8 regional DMOs. The government has been providing subsidies to local and regional tourism organizations through the Ministry of Transport and Construction of the Slovak Republic since 2012 until present:

- The local tourism organization (*oblastná organizácia cestovného ruchu – OOCR*) may receive a subsidy equal to the value of the previous year's membership fees, whereas the maximum amount of the subsidy is limited to 90% of the collected accommodation tax of all member municipalities.
- The regional tourism organization (*krajská organizácia cestovného ruchu – KOCR*) may receive a subsidy in the same amount as the contribution of a regional administrative unit - Nomenclature of Territorial Units for Statistics 3 level (*NUTS* 3), whereas the maximum amount of the subsidy is limited to 10% of the collected tax for accommodation of all member municipalities of local tourism organizations.

The Act also defines the conditions for recreation contribution (recreation vouchers) that were introduced in 2019 to boost domestic tourism. Companies employing more than 49 people are required to provide recreation vouchers or reimbursement to employees who have been employed for at least 24 consecutive months and upon their request. Smaller employers may choose to provide the contribution voluntarily but are not required to. The employer contribution equals 55% of eligible costs, to a maximum of EUR 275 per calendar year. The vouchers are exempt from income tax and are tax-deductible expenses for the employer. Recreational vouchers can be used for domestic tourism services connected with accommodation for at least two-night stays, catering services or other services related to a recreation. The contribution is reduced proportionally for part-time employees. Employees can also use the vouchers to pay for holiday camps for their children. The

recreation contribution has been introduced via an amendment to the Act No. 91/2010 Coll. that indirectly amends several other acts, including the Slovak Labour Code.

The **Tourism Support Act** was modified nine times whereas the last three times were concerning the tourism support in connection with the pandemic (the latest updated version is from November 28th, 2020).

The **Act on Tours and Business Conditions of Travel Agencies** (2018) (Act no. 170/2018 on the Travel Agencies Regulation - *Zákon o zájazdoch, spojených službách cestovného ruchu, niektorých podmienkach podnikania v cestovnom ruchu*) regulates the travel agency services, specifies the rights and responsibilities of travel agency as well as conditions of entrepreneurship in tourism. Amendment to the Act (from May 29th, 2020) implemented measures aimed at mitigating the negative effects of the pandemic, such as the possibility for the travel agency to postpone the provision of the trip and the possibility for certain groups of clients to refuse a postpone of the trip (e. g. unemployed, seniors) and the regulation of terms between the travel agency and the client. Second amendment to the Act (from July 21st, 2020) was part of a series of changes to several policies aimed at reducing the bureaucratic burden on the business sector.

The **Act on Consumer Protection in Tourism** (2011) (Act no. 161/2011 - *Zákon o ochrane spotrebiteľa pri poskytovaní niektorých služieb cestovného ruchu a o zmene a doplnení niektorých zákonov*) regulates the consumer rights in tourism.

The conditions of entrepreneurship in tourism are regulated by other legislations that partially influence tourism SMEs, including Slovak Commercial Code (Act no. 513/1991 - *Obchodný zákonník*), Slovak Trade Licensing Act (Act no. 455/1991 – *Živnostenský zákon*) and Slovak Civil Code (Act no. 40/1964 – *Občianský zákonník*). Legislations regulating the entrepreneurship in tourism do not change very often (compared to other legislations). However, entrepreneurs in tourism are increasingly calling for the improvement of the business environment (SBA, 2020).

In the **World Economic Forum** (*WEF*) report for the year 2019 (the latest released), Slovakia was placed at the 60th position from 140 monitored states (with an overall score of 4.0). Compared to the last rated period, there was a slight increase in total score (59th in 2017 with an evaluation score of 3.9 and 61st in 2015 with an evaluation score of 3.8). Slovakia lagging behind the world competition is depicted in figure 26.

The competitiveness of Slovakia's tourism is largely determined by the fact that the sustainability of tourism development has been evaluated negatively. Slovakia is also lagging behind in transport availability (especially in air infrastructure), inefficient macro-marketing, unreliable police services, a difficult approach to skilled labour force, insufficient number of high-capacity sports stadiums, insufficient government attention and a careless approach towards the development needs of the tourism sector. On the contrary, Slovakia is leading in minimizing the incidence of terrorist threats, malaria and HIV, as well as in access to drinking water and covering the signal of mobile network operators.

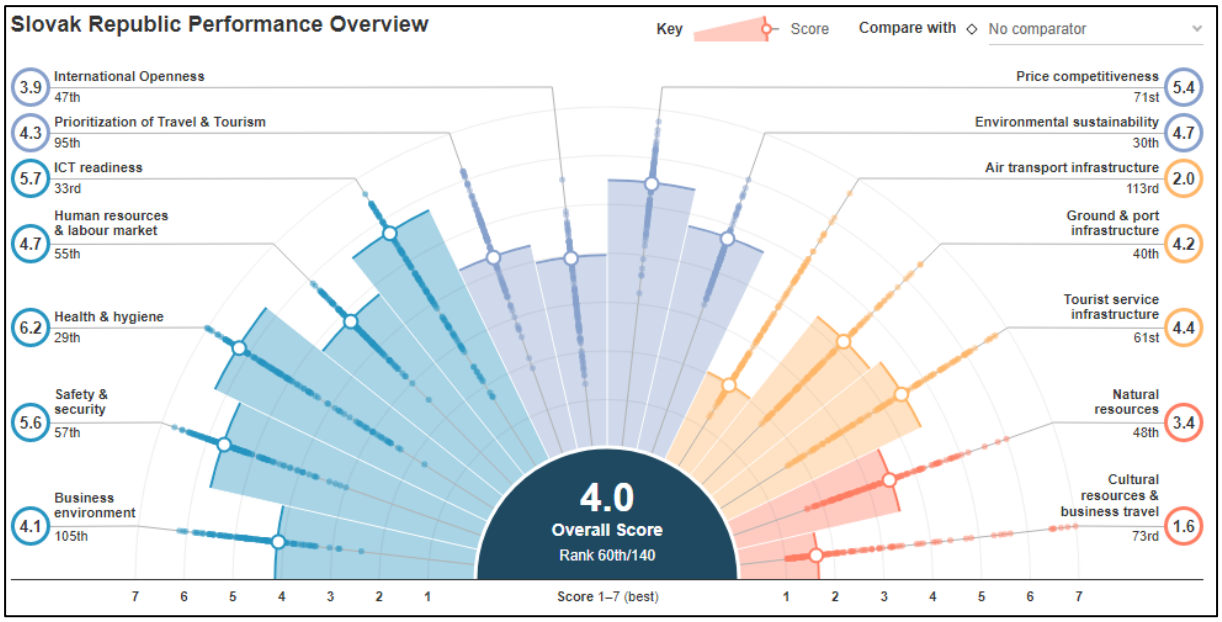

Figure 27: Slovakia´s Travel and Tourism Competitiveness Index (*World Economic Forum, 2019*)

4.18.1.2 Policies and Strategies for Sustainable Tourism at Regional Level -

Administratively, Slovakia is divided into 8 self-governing units (*NUTS* 3 regions, figure 27) creating 8 administrative regions. The regions are further subdivided into 79 districts (*okresy*). Each region must have adopted or is currently preparing/revising a tourism development strategy as a part of a programme of economic and social development/Integrated territorial strategy which is an obligatory planning document. In recent years, regional policies and strategies have begun to pay more attention to the sustainable development of tourism.

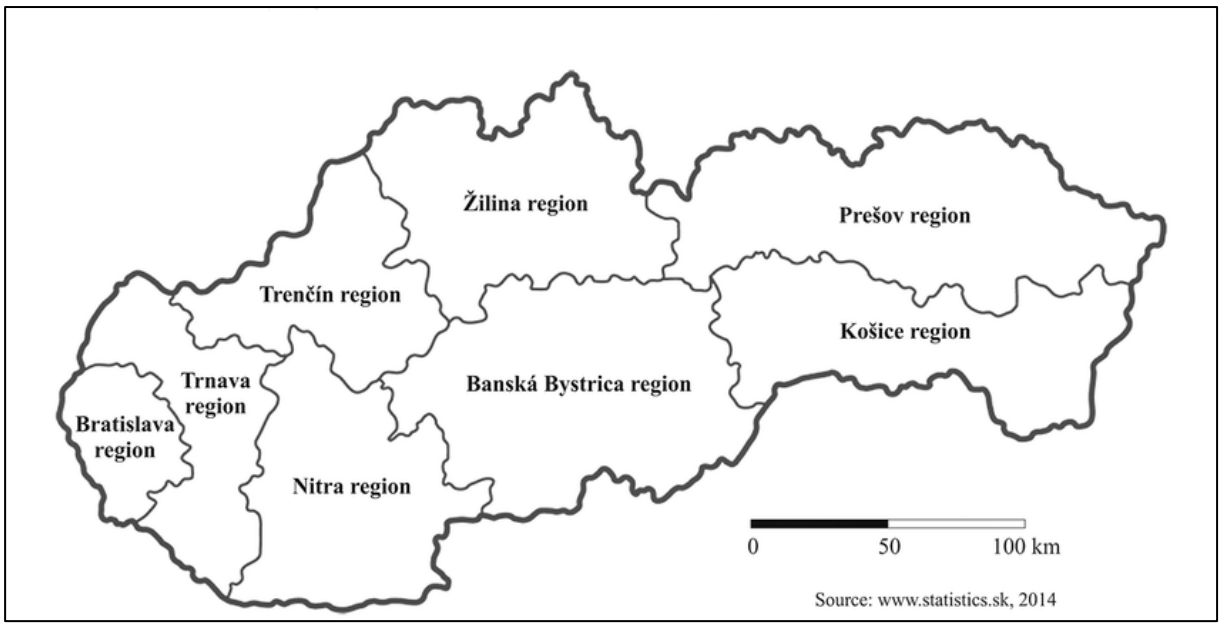

Figure 28: Slovak regions (*Statistics.sk, 2014*)

The Strategy of Ecotourism Development in Košice Region (*KOCR Košice region turizmus*, 2021) defines ecotourism and green mobility as a competitive advantage of the Košice region. The strategy contains three partial objectives: (1) Supporting creation of ecotourism products in the Košice

Region, (2) Development of support infrastructure and ecotourism services and (3) Marketing ecotourism offer of the region. The strategy builds on the theory of ecosystem services and aims to harness the regions' natural and cultural richness for the development of ecotourism.

The Development concept of nature-based tourism in Banská Bystrica region until 2030 (*KOCR Banskobystrický kraj turizmus*, 2021a) presents a proposal of activities that can help local actors to develop nature-based activities in the protected areas of the *Banská Bystrica region*. The concept defines four partial objectives: (1) Contribute to the formation of a quality background for the administration of protected areas as important destinations; (2) Making the protected areas of the *Banská Bystrica region* more attractive for the development of sustainable tourism, especially for tourism development in protected areas; (3) To develop tourism services with an emphasis on maintaining the attractiveness of protected areas for visitors in nature-based tourism and the development of the local economy in the region; (4) Stimulate accessibility of protected areas and natural sites of the Banská Bystrica region to visitors in nature-based tourism with an emphasis on sustainability.

The Tourism Development Strategy in the Trenčín region for the period 2020 – 2024 (*KOCR Trenčín region*, 2020) identifies priorities of tourism development in the region, including sustainable development of tourism, with focus on measuring tourism performance, customer-oriented product quality, support for ecological tourism, support for the sustainable development of product lines, strengthening regional product brands and experience co-creation.

Development of Sustainable Tourism and Certified Brands in the destination Nitra 2020 – 2025 (*OOCR Nitra*, 2020) presents analyses of tourism in the destination Nitra and proposes measures for the further direction/prospect of tourism development.

Still in process: Strategy of Sustainable Tourism Development of *Košice region* 2021-2027; Strategy of Tourism Development of *Žilina region* 2022-2026; Program of Economic and Social development of the Banská Bystrica region 2021-2027 and Sustainable Tourism Strategy in the *Muránska Planina National Park* until 2030. The sustainable development of tourism is becoming a part of further development programmes (e. g. Strategy of tourism development of *Košice region*). However, the application of the principles of sustainable tourism development is insufficient in strategic documents. Tourism development strategies often lack or neglect important topics, focus on measures that address mainly economic performance indicators and do not apply tools to review the wider impacts of tourism.

4.18.2 Key Stakeholders

4.18.2.1 Governmental and semi-governmental bodies

From a public sector perspective, several governmental institutions are influencing tourism development directly or indirectly. The Ministry of Transport and Construction of the Slovak Republic (Tourism Section) and newly re-established Slovak Tourist Board are the dedicated government agencies in terms of influencing the policies, strategies and actions of tourism industry in Slovakia. Other ministries listed below impact indirectly based on the agenda (foreign affairs, environment, agriculture etc.) sectorial policies.

Tourism is directly embedded in the competence of the **Ministry of Transport and Construction of the Slovak Republic, the Section of Tourism** (*Ministerstvo dopravy a výstavby Slovenskej republiky, Sekcia cestovného ruchu*). The section creates conditions for the development of tourism as a state priority as well as to develop, implement and monitor the national policy of tourism. It also prepares the concept of tourism development and is responsible for its implementation. Furthermore, the section participates in obtaining statistical data on the development of tourism and supporting the activities of local self-government units in the development of tourism and the activities of local and regional destination management organizations. The section cooperates with the Ministry of Environment of the Slovak Republic on the promotion of sustainable tourism in protected areas as well as with other ministries (Ministry of Foreign and European Affairs, Ministry of Culture etc.) in specific agendas. Till April 2021, the section also supplements the activities of the national tourism board (Ministry of Transport and Construction of the Slovak Republic, 2021).

The Slovakia Tourism Board (*Slovenská agentúra pre cestovný ruch Slovakia Travel*) is a re-established (on 1st April 2021) national tourism board focusing on marketing, presentation, and distribution of information about tourism in Slovakia. The activities of the organization include marketing research, marketing strategy, informatization and digitization of tourism services and management of a data analysis centre. The re-established organization also wants to focus on systematic collection of statistical data as well as creation of a monitoring statistical system of tourism based on the eVisitor - Croatian national tourist information system (Ministry of Transport and Construction of the Slovak Republic, 2021).

The Ministry of Foreign Affairs and European Relations of the Slovak Republic (*Ministerstvo zahraničných vecí a európskych záležitostí Slovenskej republiky*) is responsible for the development of relations with other states and co-operation with multi-national and international organisations, in particular in the area of foreign and security policy, bilateral relations, economic co-operation, culture, science, technology, and education. The Ministry is also responsible for foreign marketing activities focusing on tourism in Slovakia, the representation of Slovakia at international events, information about Slovakia to foreign parties as well as memberships in international organizations with a direct or indirect impact on tourism (Ministry of Foreign Affairs and European Relations of the Slovak Republic, 2021).

The Ministry of Environment of the Slovak Republic (*Ministerstvo životného prostredia Slovenskej republiky*) is the central state administrative authority and supreme inspection authority in environmental affairs such as nature and landscape protection, waste management, protection of water resources and the quality of groundwater and surface water, national environmental policy and unified information system on environment and area monitoring. The ministry's areas of interest include the environment development monitoring (sectoral indicators – also tourism), green and circular economy, environmental management (Scheme for Environmental Management and Audit – EMAS and green public procurement) and environmental education and education for sustainable development (Slovak Geoparks promotion). Despite the nature protection responsibility, the ministry has only a small role in the administration and management of Slovak national parks (Ministry of Environment of the Slovak Republic, 2021).

The Ministry of Agriculture and Rural Development of the Slovak Republic (*Ministerstvo pôdohospodárstva a rozvoja vidieka Slovenskej republiky*) is a central state authority responsible for

the development of agriculture, food industry, forestry, hunting and fishing. Part of the Ministry is the **State enterprise Forests of the Slovak Republic** which manages forests and other property in the ownership of the Slovak Republic. The enterprise is an economic organisation entitled to carry out permanent enterprise activities, production and trade. The state enterprise has an important role in managing the current state of national parks and is being accused of excessive forest logging and other nature-damaging activities (Ministry of Agriculture and Rural Development of the Slovak Republic, 2021).

The Ministry of Investments, Regional Development and Informatization of the Slovak Republic (*Ministerstvo investícií, regionálneho rozvoja a informatizácie Slovenskej republiky*) is responsible for the management, coordination and supervision over the use of the European Union funds, investments, regional development and central management of information society and digital market policy. The Ministry's **Department for Agenda 2030 Coordination** is directly responsible for the Agenda 2030 implementation addressing SDGs. The department has defined six national priorities for the implementation of the Agenda 2030: (1) Education for a life in dignity; (2) Transformation towards a knowledge-based and environmentally sustainable economy in the face of changing demography and global context; (3) Poverty reduction and social inclusion; (4) Sustainable settlements, regions and countryside in the face of climate change; (5) Rule of law, democracy and security and (6) High quality health care. To achieve these priorities, the Department for Agenda 2030 Coordination has established a Government Council for Agenda 2030 involving key line ministers, as well as representatives of NGOs, academia, the private sector, and associations of cities and regions of Slovakia (Ministry of Investments, Regional Development and Informatization of the Slovak Republic, 2021).

The Ministry of Culture of the Slovak Republic (*Ministerstvo kultúry Slovenskej Republiky*) is responsible for preservation of monumental funds, national heritage and library science, art, copyright and copyright laws, extension service and folk artistic production, support of cultural innovation for ethnic minorities, presentation of the Slovak culture and arts abroad, relations with churches and religious societies, media and audio-visual. The Ministry is directly responsible for protection and cultivation of tangible and intangible cultural heritage of the Slovakia (Ministry of Culture of the Slovak Republic, 2021).

The Ministry of Economy of Slovak Republic (*Ministerstvo hospodárstva Slovenskej republiky*) is a central body of state administration for industry (with exceptions for wood processing, biotechnologies, food industry and construction products), power engineering, heat and gas manufacture, domestic and foreign trade, tourism and consumer protection as well as policy related to creation and support of business environment. The Ministry of Economy of SR is the most important institutional actor to support SMEs. **The Slovak Investment and Trade Development Agency** (Slovenská agentúra pre rozvoj investícií a obchodu - SARIO) is a contributory organization of the Ministry of Economy of SR focusing on supporting the inflow of investments and supporting the export activities of Slovak enterprises (Ministry of Economy of the Slovak Republic, 2021).

The Slovak Business Agency (SBA) is a non-profit organization that mediates financial programmes from the state budget and European Union funds for the development of small and medium-sized enterprises (including tourism). Its objectives include the survival rate of enterprises, the employment rate in the private sector, innovation performance, entrepreneurship spirit and the

increase of the competitiveness of Slovak business environment and Slovak enterprises (Slovak Business Agency, 2021).

At the regional level, each of the 8 **self-governing regions** has a department focused on the development of tourism in the region, often as a part of cultural or regional development department. Therefore, self-governing regions support the development of tourism primarily by establishing a regional (DMO) tourism organization (*krajská organizácia cestovného ruchu – KOCR*, currently 8), to which they delegate their competencies and tasks (e. g. tourism planning, marketing and financial support). At the local level, **municipalities** support the development of tourism mainly by establishing a local (DMO) tourism organization (*oblastná organizácia cestovného ruchu – OOCR*, currently 38). Businesses can be directly members of a local DMO, indirectly of a regional DMO.

4.18.2.2 Tourism Associations

Tourism associations include various voluntary, non-profit industry associations, unions and professional associations whose main task is to represent their members (in contact with the state) and to support cooperation in tourism. The most relevant are the Slovak Tourism Association and the Association of Hotels and Restaurants of Slovakia.

The Slovak Tourism Association (*Zväz cestovného ruchu SR*) is a professionally oriented organization of employers in tourism that represents members from hotels and restaurants, tour operators, cableways and ski lifts, rural tourism and agrotourism as well as spas. The priorities of the association focus currently on: (1) regulatory framework for a sharing economy, (2) administrative and tax burden, (3) innovations in employee training and employment, (4) effective management and promotion of tourism and (5) responsible and sustainable approaches (Slovak Tourism Association, 2021).

The Association of Hotels and Restaurants of Slovakia (*Asociácia hotelov a reštaurácií Slovenska*) is a voluntary, non-political and professional organization whose purpose is to defend the common interests of its members against government bodies and other organizations, increase professional prestige of members, influence public opinion and opinions of tourism governing bodies. Through its activities, the association focuses on improving professionalism of business in tourism, the quality of services, prepare comments on draft laws and decrees related to tourism, organize training for employees, provide legal and consulting services and promote the best examples from tourism and hospitality practice (Association of Hotels and Restaurants of Slovakia, 2021).

The Association of Information Centres of Slovakia (*Asociácia informačných centier Slovenska*) represents tourist information centres in Slovakia. The Association focus on improving the quality of services on the basis of current international standards and thus improving the situation in Slovak tourism (Association of Information Centres of Slovakia, 2021).

The Slovak Tourists Club (*Klub slovenských turistov*) is one of the largest civic organizations in Slovakia in the field of sports, tourism and leisure. The organization focuses on public benefit/beneficial activities, such as marking hiking trails, creating conditions for the development of tourism, sports, culture and nature conservation (Slovak Tourists Club, 2021).

The Slovak Cycling Club (*Slovenský cykloklub*) is engaged in creating a network of cycling routes in Slovakia. The organization acts as the National Coordinator of the cycling network, maintaining a

register of cycling routes, providing professional advice for planning, authorization and marking of cycling routes (Slovak Cycling Club, 2021).

Geoparks Network of the Slovak Republic (*Sieť geoparkov Slovenska*) is an association that focuses on improving the conditions for the development of geoparks in Slovakia, the interests of existing geoparks and their promotion. The main aim of the organization is to support the development of geoparks (especially in economically underdeveloped areas), which can stimulate protection and presentation of the natural resources combined with sustainable and economic development based on environmentally friendly tourism (Geoparks Network of the Slovak Republic, 2021).

4.18.2.3 NGOs, Sustainable Tourism Networks and Partnerships

There are numerous tourism NGOs, public initiatives and partnerships, however, in terms of sustainable tourism, only a few are relevant.

We are forest (*My sme les*) is a civic initiative that campaign against the destruction of national parks and forests in Slovakia. The 10 main principles of the initiative include that (5) forest logging and other nature-damaging activities in national parks should be replaced by sustainable tourism and nature tourism and (7) regional development, as well as tourism and sports can also be implemented in accordance with the protection of national parks. The main objective of the initiative includes that (1) the area of protected areas without human intervention reaches at least 5% of the area of Slovakia (today 1.8 %) and (2) Slovak national parks meet the International Union for Conservation of Nature (IUCN) standards and gradually increase the no-intervention zone to 75% of their total area. The initiative has currently more than 70,000 members (We are forest, 2021).

Aevis´ mission is to protect wild nature, preserve natural and cultural values, support local communities and regional development. Aevis activities and projects focus mainly on (1) protection of the environment through the return of true wilderness and the preserving of natural values, (2) support for regional development, local communities and the preservation of cultural values, in particular through ecotourism, (3) promotion of cooperation between public and private sector and (4) education and training especially in terms of wilderness conservation, preservation of natural and cultural values and ecotourism (Aevis, 2021). One of the Aevis´ projects focuses directly on **nature tourism development** in Slovakia and tourism development in the **National Park Poloniny**. **Aevis** also published the Concept of Natural Tourism in the conditions of Slovakia (2019) as further mentioned in the chapter *Sustainable Tourism Initiatives, Projects or Campaigns*.

For Valley (*Pre dolinu*) is a civic association that seeks to reverse current unfavourable development of human activities in the *Demänovská Valley*, also known as *Jasná* in Low Tatras National Park, (*Demänovská Dolina, NP Nizke Tatry*) towards sustainable tourism and the preservation of its exceptional natural wealth. The association together with **Aevis** and **My sme les** raised a petition to save the Demänovská Valley signed by 113,000 people (For Valley, 2021).

Cleantech Slovakia is a platform that focus on managing tourism and environmental policy in the state administration, in professional organizations with a nationwide reach, but also in the long-term implementation of sustainable development and tourism development measures in the private sector. The platform cooperates with the Association of Hotels and Restaurants of Slovakia (Cleantech Slovakia, 2021).

Footour is a civil association (*Footour OZ*) that promotes the concept of responsible travel. One of their main objectives is to raise awareness of the type of travel that contributes to regional development, reduces the unequal distribution of profits in tourism, while reducing the burden on the environment, respecting local cultures, supporting marginalized groups and the personal development of the traveller. Footour, together with its partners, creates an environment for sustainable travel in destinations (Footour, 2021).

Black Holes (*Čierne diery OZ*) is a civil association initiative that started as an idea to promote industrial decaying monuments and architecture in Slovakia. The initiative promotes stories of various buildings and factories scattered all over the country, including those in remote villages, and inspiring people to explore less visited regions. In collaboration with Slovak visual artists, illustrators, and graphic designers, the Čierne Diery creates prints and graphics of architectural and technical monuments that are becoming very popular. Čierne Diery's graphics and books have become independent bestsellers, and their broad community of supporters have allowed them to financially support the protection of monuments and various cultural institutions (Black Holes, 2021)

Gothic Route (*Gotická cesta OZ*) is an association that focuses on protection and restoration of Gothic monuments in the regions of *Spiš* and *Gemer*. The members of the association are experts in cultural heritage, representatives of the municipality and the church. The Gothic Route was the first themed trail created in Slovakia, linking the most important Gothic monuments (Gothic Route, 2021)

4.18.2.4 Relevant research and educational bodies

In Slovakia, there are 7 higher education institutions with various study programmes that includes tourism**.** The most relevant are *Matej Bel University* in Banská Bystrica, the Faculty of Economics; *Technical University of Košice*, the *Faculty of Mining, Ecology, Process Control and Geotechnologies*; *University of Economics in Bratislava*, the *Faculty of Commerce and University of Prešov*, the *Faculty of Management*. Their focus on tourism research and education is diverse (geotourism, services, regional development and management) and they do not declare an explicit focus on sustainable tourism. In terms of sustainable tourism, the most relevant institution in the field of higher education is the Matej Bel University in Banská Bystrica, Faculty of Economics, Department of Tourism. The Department is the oldest university school focusing on tourism in Slovakia (established in 1964). The Department provides the study of tourism in three degrees (bachelor, master and doctoral) as the only one in Slovakia and one of the few in the Visegrad Four countries (V4). The master study programme Economy and Management of Tourism is certified by the UNWTO Tedqual scheme. The Department´s research priority is sustainable, responsible, and smart tourism development in a dynamically changing environment. With regards to this priority, the research is focused on the sustainable and responsible tourism development as the basic principle of its development and creation of the tourism policy on the local, regional, and macro level in the highly competitive environment.

4.18.2.5 Individual tourism businesses and destinations of particular relevance

The Banská Bystrica regional DMO (*KOCR Banskobystrický kraj turizmus*) focuses on sustainable tourism development and promotion of local destinations within its territory. The DMO launched several project and activities to support local communities, e.g. it operates an e-shop focusing on

regional products of local craftsmen and a reservation system that enables to book activities such as beekeeping or participating in pottery courses (*KOCR Banskobystrický kraj turizmus*, 2021b)

The Košice regional DMO (*KOCR Košice region turizmus*) focuses on ecotourism development with several projects, including infrastructure for cyclists, birdwatching tours, river rafting and open-air museums. The Košice regional DMO also started with the systematic collection of data on tourism development on the example of the European Tourism Indicator System (ETIS) and created its own data dashboard. The ETIS is a system of indicators for tourist destinations that supports more intelligent approach to tourism planning (European Commission, 2016).

The Liptov local DMO (*OOCR Liptov*) includes one of the most visited destinations in Slovakia – *Demänovská Dolina* (*Jasná*), where in recent years there has been uncontrolled construction and excessive development of tourism with signs of overtourism (excessive number of cars, environmental damage). To disperse tourists, DMO Liptov launched a campaign called Unknown Liptov (*Nepoznaný liptov*) that seeks to promote less visited places and shows tourists other parts of the destination (OOCR Liptov, 2021).

The ECO-friendly hotel Dalia is one of the first ecological hotels in Slovakia. In 2011, the hotel received an EU Ecolabel certificate. Today, the hotel is one of the leaders in promoting sustainability and environmental management principles in hospitality services (Hotel Dalia, 2021).

Steyslovakia is a travel agency (TA) that supports local producers from less popular and remote destinations located in Central Slovakia (Steyslovakia, 2021).

The travel agency (**Watching.sk** was established with the main aim to reveal the beauties of Slovak nature to domestic and foreign clients. The TA focuses mainly on birdwatching, wildlife watching (bears, wolves, deer) and also lectures, as well as excursions for children and a wide public (Waching.sk, 2021).

4.18.3 Activities and instruments for the development of sustainable tourism

4.18.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

The NGO Aevis published the **Concept of Natural Tourism in the conditions of Slovakia** (2019) that defines the importance of tourism with an emphasis on nature tourism in the conditions of Slovakia. The document identifies the nature tourism products, best practice examples of nature tourism in Slovakia and abroad, support for the development of nature tourism and the concept of natural tourism development in Slovakia.

The Association of Hotels and Restaurants of Slovakia has joined the **International Hotels Environment Initiative** (*IHEI*), which the International Hotel & Restaurant Association (*IH&RA*) called Green Management (*Zelený programme*). The aim of the initiative is to support the activities of the hotel industry to improve the environment by reducing the consumption of all types of energy, reducing waste and emissions. The Association has developed a short set of examples of how hotels can take care of the environment.

The Slovak Business Agency is an official partner of the **EU Ecotandem training** which seeks to support sustainable development of tourism and at the same time develop the knowledge and skills of tourism SMEs through transnational cooperation, technology transfer and know-how.

Approximately 50 applicants from Slovakia joined the EU Ecotandem Academy (2021), with a few representatives of SMEs and DMOs.

4.18.3.2 Marketing and information services supporting sustainability in tourism

In the spring of 2021, the Association of Information Centres of Slovakia launched a campaign **Discover Sustainable Slovakia** (*#ObjavUdržateľnéSlovensko*) which seeks to support sustainable tourism development, ecotourism and environmental education in Slovak destinations and tourist resorts. The campaign promotes various tourism locations without clearly addressing sustainable tourism issues.

4.18.3.3 Tourism Sustainability Certification Systems and Awards

For Slovak SMEs, **the EU Eco-Management and Audit Scheme** (*EMAS*) is available, however, there are currently 37 Slovak organizations registered in the EMAS scheme, none representing the tourism sector. Bratislava Region has been selected in the **Sustainable Top 100 Destinations** 2020 (Green Destination). Green Destinations is a non-profit foundation and global partnership of representatives from various fields for sustainable destination development (Green Destinations, 2021). So far, the Bratislava region is the only Slovak destination certified by Green Destinations. Apart of these systems, there are no further sustainability tourism certificates used by SMS and destinations in Slovakia. There are various certification schemes available for tourism businesses (most popular EMAS), however awareness of businesses and their willingness to get certified is still lacking.

4.18.3.4 Capacity Building for Sustainable Tourism

The government can provide support tools to enhance and push the sustainability agenda within various sectors of economy including the tourism sector (service providers and destinations) by setting up efficient institutional network and stimulating legislative framework. Therefore, we critically assess the efforts of present and past governments to really concentrate on the agenda of sustainable development (including sustainable tourism development). There is a gap between including the principles of sustainability into strategies and practical doing. The implementation of SDGs has not met the expected progress and the business sector does not experience the environmental support to push the agenda of sustainability. At the level of destinations, there is a lot of competition among too many micro-regional DMOs, striving to attract more tourism arrivals and higher volume of tourism receives. There is a nexus between the economic, ecological, and social pillar. The last two mentioned pillars are being neglected as the primary focus is set on economic sustainability. Thus, capacity building on sustainable tourism is lacking in Slovakia.

4.18.3.5 Financial Support for SMEs in regard to sustainable tourism activities

The development of tourism in Slovakia is supported mainly by the Ministry of Transport and Construction of SR´s subsidies for local and regional destination management organizations. The current system of SME financial support in the Slovak Republic is relatively complex but unclear, it includes numerous tools which deal with the issue of SME support. Government programmes include:

The Scheme to support small and medium-sized enterprises (Ministry of Economy of the Slovak Republic, 2021) aims to support start-ups and existing SMEs with non-repayable financial contribution on foreign internships, participation on international professional events, training e-shops, group counseling, and membership in a business incubator etc.

The Scheme to support the development of the creative industry (Ministry of Economy of the Slovak Republic, 2021) aims to support SMEs that have the potential to increase their competitiveness through product, service or environmental innovation.

The Scheme to support family business (Ministry of Economy of the Slovak Republic, 2021) aims to create the conditions for a sustainable family business and concentrates on free professional support on various business topics.

The focus of **the Startup Support Program** (Ministry of Economy of the Slovak Republic, 2021) is the assistance in the form of consulting and support services that aims to develop interest in entrepreneurship, support for e business entry and the development of innovative activities for those interested in entrepreneurship.

The Ministry of Agriculture and Rural Development of the Slovak Republic (2021) is responsible for state aid in the agricultural sector and **Rural Development Program** (e. g. investments in SMEs in rural areas with potential for tourism development).

The Ministry of Environment of the Slovak Republic (2021) supervises the **Environmental Quality Program** which seeks to increase share of waste recycling or better heating systems. The Ministry manages the **Environmental Fund** which allows to provide support in the form of loans and subsidies (e.g. to increase the energy efficiency of existing buildings).

In 2018, an amendment to the Value Added Tax Act was adopted, which reduces the VAT on accommodation services to 10%, compared to a national rate of 20%.

4.18.4 Summary and conclusion on national situation

Despite the fact that tourism in Slovakia accounts for 2.5% of GDP, the share of tourism expenditures in total expenditures has been low in recent years (from 2017 to 2020 at the level of between 0.05% till 0.07%), which is in contrast to the fact that tourism is one of the long-term priorities of the Slovak government (SBA, 2020). The current form of financial support for tourism enterprises in Slovakia is **connected mostly with the COVID-19 measures.** In order to minimize negative impact of COVID-19 pandemics on tourism businesses the ministry commissioned on tourism agenda (Ministry of Transport and Construction SR) has allocated 100 mil. EUR with funding allocation (10 mil. EUR in 2020, 70 mil. EUR in 2021 and 20 mil. EUR in 2022). Eligible to apply for the grant support are various service providers (accommodation facilities, catering facilities, sport amenities, ski lifts, tour operators and travel agencies, tourist guides, sport rental shops, amusement parks, lunaparks, zoos, botanical gardens, museums, as well as congress and exhibition facilities.

Challenges with regard to the (post-) COVID-19 situation are linked with quick adoption to COVID-19 protocols within HORECA sector. The future in tourism industry worldwide including small country in the Central Europe - Slovakia is link with uncertainty and ambiguity. It will be a key component to stimulate the growth of industry to bring back the customer trust and to rebuild the tourism so that

foreign visitors will re-invent Slovakia again. It is strongly believed that domestic demand can constitute more-less the 50 % of the market share but remaining half needs to be supported by international demand. For the summer season 2021 we are witnessing a significant drop in volumes of international tourism arrivals and international tourism receipts even in the top destinations of the country (capital city Bratislava, the most visited national park High Tatras, Liptov, spa resorts, cultural cities in the Gothic route etc.). Without putting back Slovakia on international tourism map the recovery of the tourism industry as well as the future sustainable development cannot be ensured as the volumes of domestic visitors cannot fully replace the decreasing market share.

In order to boost sustainable tourism for SMEs there are inevitable changes in the business environment necessary as clarified in the initial part of this chapter.

There is no doubt, that agenda of sustainable tourism development requires even more attention than ever, and it is the one and only pathway to a future competitiveness of European tourism.

4.18.4.1 Ambitions and achievements regarding sustainable tourism and the role of SMEs in it

The upcoming national tourism strategy has the opportunity to clearly emphasize the importance of sustainable development of tourism as well as the responsibilities of all relevant stakeholders on the local, regional and national level. However, the extent to which the new strategy will take into account the principles of sustainable development, SDGs or six national priorities for the implementation of the 2030 Agenda is unclear. Regional policies and strategies have begun to pay more attention to the sustainable development of tourism. The application of the principles of sustainable tourism development is insufficient in regional strategies as they often lack or neglect important topics and address mostly economic performance of the tourism businesses. Gradually, more and more tourism businesses consider sustainability as their basic concept (Eco Hotel Dalia, SteySlovakia). Though, these are rather rare cases.

4.18.4.2 Challenges for the development of sustainable tourism and for SMEs

Despite the fact that several businesses declare their commitment to the sustainable development of tourism, sustainability is still not perceived as a necessity by Slovak tourism businesses. So far, tourism businesses do not consider sustainable tourism to be very beneficial for their performance. Slowly, NGOs (Aevis), public initiatives or even business consulting projects (e.g. Cleantechslovakia) are emerging that seek to improve this situation, but they are only at the beginning. The incomplete zoning of national parks also does not improve the preconditions for sustainable tourism development in Slovakia. Furthermore, the limited competencies of state nature protection and the strong position of the state forest enterprise cause further environmental problems in protected areas.

4.18.4.3 Prospects and challenges with regard to the (post-) COVID-19 situation

The unclear situation, slow and insufficient government support, frequent legislative changes due to anti-pandemic measures and significantly reduced foreign demand currently substantially affect the tourism businesses in Slovakia. Several tourism associations are calling for increased support from the state, which is influencing the day-to-day activity of businesses through its interventions. Without the appropriate measures to improve access to finance to overcome the economic effects of

the pandemic, many businesses could go bankrupt soon. Therefore, the recovery of the tourism sector and further development is primarily influenced by the measures currently being taken. The recovery of the tourism sector will depend to a large extent on the development of the epidemiological situation, stimulation of demand as well as the ability to take support measures and financial assistance intended for businesses in the sector in which economic activity has been completely stopped, respectively limited.

4.18.4.4 Recommendations for boosting sustainable tourism for SMEs

The new national strategy should consider the outcomes of other national documents, in particular Envirostrategy (2019) and Slovakia 2030 (2020). Since each strategy is from a different governmental body (ministry) each covers only a different partial topic of tourism development. For boosting sustainable tourism for SMEs, it is necessary to take appropriate measures and tools that can stimulate the interest of businesses in applying the principles of sustainable development (educational programmes, subsidies, tax relief, and suitable certification schemes).

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4.19 Spain

Macia Blanquez-Salom
(As of December 2021)

4.19.1 Political framework for Sustainable Tourism

4.19.1.1 National Sustainable Tourism Policies and Strategies

The government of Spain issued the elaboration of the **Strategy of Sustainable Tourism of Spain 2030**, through its Secretariat of State of Tourism. Although called sustainability, this strategy stresses its aim to boost "a model of sustained growth". In January 2019, strategic guidelines of this new national agenda of tourism, analysing future challenges facing the tourist sector in the next decade, were presented (Ministry of industry, trade and tourism, 2019).

After the beginning of the COVID-19 pandemic, the government of Spain also launched a **Plan of Recovery and Resilience "España Puede"** including a **"Sustainability Strategy for Destinations"** (Presidency of the Government of Spain, 2020). Its aim is to allocate the public investment into three different kinds of tourist areas: international sun and sea destinations, villages of the interior, large cities and urban destinations (Ministerio de Industria, Comercio y Turismo, 2020a).

This type of public investment plans in tourist destinations have a long tradition in Spain, especially aimed at public infrastructure works (such as to construct sewage treatment plants, pave streets or build public facilities) and the promotion of the destinations (such as through advertising campaigns). These are examples of previous public investment plans: FUTURES I and II (1993-1999), PICTE (2000-2007), and HORIZONTE 2020 (2008-2010). Altogether, 264 plans have been paid by the Spanish public administration, with an entire investment of 660 million euros, of which the Secretariat of Tourism contributed 220 million to local entities. One of its main aims is "the improvement of the competitiveness of the tourist destination". A public call opens every year, and local and regional administrations may apply for money via this public call. Nearly 2.000 M€ are being invested in 2021 in 23 tourist destinations (Ministerio de Industria, Comercio y Turismo, 2020b).

Due to the COVID19-Pandemic also **specific programmes** as well as **Security and Hygiene Protocols** have been released, entitled "Guides for the reduction of contagion by the coronavirus SARS-CoV-2 in the tourism sector". Within this framework many segments and aspects of the tourism industry are considered: active tourism, campsites, golf courses, hostels, hotels, restaurants, rural accommodation, spas, tour guides, tourist information offices or travel agencies, among other (Ministerio de Industria, Comercio y Turismo, 2020c).

4.19.2 Key Stakeholders

4.19.2.1 Governmental and semi-governmental bodies

Secretariat of State of Tourism (Secretaría de Estado de Turismo, SETUR), in the Ministry of Industry, Trade and Tourism, which is an "organizational structure and agencies dependent on the General Secretariat of State as well as functions and competences" (Ministerio de Industria, Comercio y Turismo, 2021). This institution is the most relevant one within the Spanish Government in terms of tourism. Each Regional Government of the 17 autonomous communities and 2 autonomous cities of

Spain. Spain is not a federation, but a decentralised unitary country, in which each autonomous community or city has its own set of devolved powers, including tourism planning and management.

Spanish Federation of Municipalities and Provinces (Federación Española de Municipios y Provincias, FEMP), which is a Spanish association of local entities that groups town councils, provincial councils, insular councils and insular "cabildos". This is a third level of the smaller public administration institutions.

Spanish tourism Council (Consejo Español de Turismo, CONESTUR) is a collegiate, advisory and consultative body attached to the Ministry of Industry, Energy and Tourism, which was conceived as a forum for dialogue, participation and collaboration between the public and private sectors. It is regulated by a Royal Decree enacted in 2005 the Government of the nation (RD 719/2005).

Conferencia Sectorial de Turismo (Tourism Sector Conference), which is a Cooperation Body of multilateral composition and sectoral scope on tourism. It brings together members of the Government of the nation, representing the General State Administration, and members of the Autonomous Government Councils, representing the Administrations of the Autonomous Communities.

Comisión Interministerial de Turismo (Interministerial Tourism Commission) which is a collegiate, advisory and consultative body attached to the Ministry of Industry, Commerce and Tourism, with 54 members belonging to both the public and private sectors. The later include representatives of the Spanish Confederation of Employers' Organizations (Confederación Española de Organizaciones Empresariales, CEOE), Chambers of Commerce, trade union organizations and renowned professionals from different fields.

4.19.2.2 Tourism Associations

Alianza para la excelencia turística (EXCELTUR) (Alliance for Excellency in Tourism), is a non-profit group formed by the Chairmen of the 34 leading Spanish tourist corporations from the following sectors: airlines, cruises, hotels, travel agencies, tour operators, credit cards, rent-a-car, tourist hospitals, and GDSs. EXCELTUR represents the biggest Employers' Organizations of Spain, whose purposes are focused on increasing their profit rates (EXCELTUR, 2021).

The **Spanish Association of Responsible, Safe and Sustainable Tourism** (Asociación Española de Turismo Responsable, Seguro y Sostenible is constituted by a group of professionals in the Spanish tourism sector with the vocation of rethinking tourism development models in a way that can contribute to tourism management more conscientious, committed and responsible, as well as with the determined commitment to design more respectful and inclusive models with the local resident communities

The **Responsible Tourism Institute, RTI** (Instituto de Turismo Responsible, 2021) is an international non-profit NGO, in the form of an association, to promote responsible tourism. RTI most well-known activity is offering the certification "Biosphere Sustainable". RTI collaborates with tourism business associations, non-governmental organizations and destination governments with an important cultural and natural heritage component, in both developed and developing countries.

4.19.2.3 NGOs, Sustainable Tourism Networks and Partnerships

Alba Sud - "Southern Dawn" would be the literal English translation of its name, but this organization is only known by its Catalan name. It is a NGO producing and dispersing educative and communicative resources, such as strengthening the work of the association of countries in the South. Alba Sud is offering a sound diagnostic of the current situation and enlightens good practice experiences of sustainable and responsible tourism. They publish news, blogs, reports and books, and organize courses, seminars and webinars on tourism from a critical, rigorous and independent point of view.

Five nature conservation NGOs in Spain represent this social movement as members of the Environment Advisory Council (Consejo Asesor de Medio Ambiente, CAMA), which belongs to the currently named Ministry for the Ecological Transition and the Demographic Challenge (Ministerio para la Transición Ecológica y el Reto Demográfico). These five NGOs promote sustainable tourism practises through their campaigns:

- **Ecologistas en Acción (EeA)** is a Spanish confederation of more than 300 environmental groups distributed by towns and cities, which considers that environmental problems have their origin in an increasingly globalized production and consumption model, from which other social problems also derive. EeA has launched campaign to denounce the environmental impacts of tourism through the publication of specific diagnosis reports on the the hidden face of tourism and on more sustainable alternative tourism iniciatives. E.g., Ecologistas en Acción has published a report on tourism and sustainability "Stop turistificación" (EeA, 2021a).
- The **Spanish Society of Ornitology** (Sociedad Española de Ornitología – SEO) is the representative organization of BirdLife International in Spain, a federation that groups together the associations dedicated to the conservation of birds from all over the world. SEO is committed to conserve biodiversity with the participation and involvement of society.
- **Greenpeace** is a global movement made up of more than 3 million people in 55 countries, working to end environmental abuses. Greenpeace publishes special reports on coastal tourism in Spain, which not only deal with environmental but also social struggles due to tourism unsustainability.
- The **Association for the Defense of Nature** (Asociacion para la Defensa de la Naturaleza - ADENA) is the Spanish representative of World Wildlife Fund (WWF), which carries out work on the ground to preserve the natural wealth in defence of the environment.
- **Friends of the Earth** (Amigos de la Tierra) is a non-profit environmental association with the mission of promoting a local and global change towards a society that is respectful with the environment, fair and caring.
- **Observatorio de la Deuda en la Globalización - ODG** (Debt Observatory in Globalisation) is an institution which elaborates critical analysis of complex and/or structural processes to show the visible (and not visible) impacts and risks of the economic and political system.

4.19.2.4 Relevant research and educational bodies

Spanish academic journals dealing particularly with tourism and sustainability: "Investigaciones Turísticas"; "Pasos, revista de turismo y patrimonio cultural"; "Cuadernos de Turismo"; "Papers de Turisme; "Journal of Tourism Analysis: Revista de Análisis Turístico".

On the one hand, public universities with the best research and educational bodies in Spain dealing with sustainable tourism are the universities of Balearic Islands, Alicante, Málaga, Santiago de Compostela, Autónoma de Barcelona, Barcelona, Sevilla and Complutense de Madrid. The most important research institutes and groups are: Instituto Universitario de Investigaciones Turísticas (Alicante), Instituto de Inteligencia e Innovación Turística (Universidad de Málaga), TUDISTAR (Universitat Autònoma de Barcelona), GIST (Universitat de les Illes Balears), Grupo de Investigación Turismo, Patrimonio y Desarrollo (Universidad Complutense de Madrid), Grupo de Investigación de Análisis Territorial (Universidad de Santiago de Compostela), Estudios Territoriales y Turísticos (Universidad de Sevilla).

On the other hand, it's important to mention the fact that some private universities offer Master degree online studies in Spanish to attract Latin American students, but most of them with low standards of quality, particularly when ruled prioritizing gains.

Additionally, and dealing with non-profit organizations, Alba Sud ("Southern Dawn") is offering the most reliable educational courses, seminars and webinars.

4.19.2.5 Individual tourism business and destinations of particular relevance

Local governments:

- Calvià (Majorca) is one of the most developed tourist destinations in Spain, where public debate and municipal administration promoted diagnostic, planning and management policies in favour of sustainability. The local authorities pioneer Local Agenda 21 process of public participation in the 1990s.
- This island of Menorca was designated as a Biosphere Reserve by UNESCO in 1993. The local authority, Consell de Menorca, plans and manages the tourist industry (http://www.biosferamenorca.org). The local authority of Menorca enacted spatial planning measures to restrict urban growth as a mean to achieve a more sustainable land use pattern of the whole island. Additionally, new the enlargement and widening of the road network has also shown its contribution to achieve a more sustainable spatial development model.
- Barcelona enacted a plan to regulate the tourist rental of housing, promoting the public debate on the tourism model of the city. The Special Urban Plan for Tourist Accommodation in Barcelona forms part of the intervention and containment measures adopted to address the overtourism problem arising from the success of Barcelona, by regulating the creation of new tourist accommodation establishments (hotels, apartments, youth hostels, collective residences, etc.) and Short Term Rentals of housing (Blázquez-Salom et al. 2019).
- Lanzarote, where the artist César Manrique leaded a campaign to stop urban growth and whose legacy for a foundation.
- The UNWTO International Network of Sustainable Tourism includes the Spanish regions of: Navarra, Islas Canarias, Mallorca, etc. Establishing sustainability indicators and making them

public can promote the public debate to re-politize the analysis of the relations of this industry with the current socio-ecological crisis. This is why the UNWTO International Network of Tourism Observatories monitoring sustainable tourism development at destination level is so important.

Businesses operating in a sustainable manner:

- **XAREC** is a network of cooperative restaurants that demands responsible tourism practices (Xarxa de Restaurants Cooperatius - XAREC). This is that the restaurants that are included in this network must fulfil social and solidarity economy requirements.
- **Els Caus de Mura,** Social and solidarity economy through cooperative organization of tourist accommodation offer, being analysed by Alba Sud (Izcara, C. & Cañada, E. (14/06/2021). These business forms, associated with the Social and Solidarity Economy, contribute to building a more responsible tourism model, which generates a greater redistribution of benefits and reduces the social and environmental impacts of this type of activity.

4.19.3 Activities and instrument for the development of sustainable tourism

4.19.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

Fundación Centro de Recursos Sociales (CERES – Social Resource Center Foundation, 2021) November is an NGO devoted to the labour insertion of all those people who, due to various factors, could find themselves in a situation of risk or vulnerability. Among other campaigns, CERES has developed the project ECOTUR, which is a Guide to the best rural tourism and agro-tourism experiences in Spain. CERES ECOTUR offers a catalogue of establishments certified by them. This initiative helps the most vulnerable people, through the creation of non-profit programs and services focused on social welfare.

FairTur - Sustainable Tourism Alliance (Alianza de Turismo Sostenible), which is an initiative of a hotel owner to certificate tourist accommodation offer.

Ecologistas en Acción (EeA, 2021b) launched a proposal of socio-ecological transformation and transition of the tourism industry in Spain, though "a reorientation of its production model promoting clean industrial development, energy transition based on renewable energies, circular economy, bio-economy, social and health services and primary sectors based on indigenous resources such as agro-ecology, extensive livestock or sustainable forestry".

4.19.3.2 Marketing and information services supporting sustainability in tourism

Javier Tejera, who is a consulting assistant on sustainable tourism: https://www.ecotumismo.org/author/felicacothran48/,http://www.albasud.org/elblogdejaviertejera . Javier gives support in communication and marketing tasks to the development of tourist routes and soundscapes projects, which is an innovative initiative to value a network of tourist routes based on ethnographic-cultural and environmental sensory experiences, with the premise of promoting a type responsible and sustainable tourism.

Red Española para el Desarrollo Sostenible (REDS Spain) that has published a "Guía para un turismo sostenible. Retos y Criterios para la Evaluación del Sector Turístico ante la Agenda 2030" (also

published in English with the title "Guide to a sustainable tourism. Challenges and criteria to measure the SDGs in the touristic sector") with the support of the Responsible Tourism Institute.

4.19.3.3 Tourism Sustainability Certification Systems and Awards

The BIOSPHERE - Sustainable certification is granted by the Responsible Tourism Institute. It creates personalized sustainability plans, involves the employees, and shares the business progress with their clients. This certification system has been applied to many businesses in Barcelona (https://www.biospheretourism.com/es/entidad/barcelona/131), which include accommodations, tourist sites and centers, active and adventure tourism, sport and wellness, amusement parks, events, transport, restaurants, etc.

Proyecto **Hoteles Justos**, „Fairhotels" , which is a certification system, promoted by Spanish Workers Unions (CCOO and UGT) for fair, professionally responsible hotels with their workers. This program aims to raise awareness among employers, employees and, especially, customers and citizens about the importance of decent work and socially responsible tourism. This service is being implemented with little real supply at present.

The European Federation of National and Naturals Parks has launched a campaign to join the "European Sustainable Tourism Charter" (CETS) through a system of tourist supply certification (EUROPARC-España, 2021). The CETS is a method and a voluntary commitment to apply the principles of sustainable tourism, guiding the managers of protected natural areas and companies to define their strategies in a participatory manner. The CETS includes: the accreditation of protected natural areas and the adhesion of companies (accommodation, guiding, travel agencies, tourism information offices, restaurants, etc.). The solvency and extensive accredited experience of the European Federation of National and Natural Parks has supported to the dissemination of this CETS proposal.

Rainforest Alliance audits in accordance with its regulations to give their Rainforest Alliance Certified. This certificate can be obtained by a hotel, tourism operators (receivers and issuers) and other tourism companies.

Green Key is an international program of sustainable tourism certificates offered by the FEE (Foundation for Environmental Education), which has been recognized by the Global Sustainable Tourism Council (GSTC). It is a process that can be long depending on the improvements that have to be made in the establishments after the inspection of the Environmental and Consumer Education Association (Asociación de Educación Ambiental y del Consumidor – ADEAC) to be recognized as Green Key. It is present in 53 different countries.

Travelife aims to guide hotels, tour operators and travel agencies to improve their environmental and social management. The Travelife online checklist and self-evaluation is based on their own Travelife Certified standard, offering membership. Its services include training, planning, reporting, management, etc.

4.19.4 Summary and conclusion on national situation

4.19.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

Spain is extremely dependent on tourism and its associated real estate industry, such as in terms of the labour market. Sustainability is threatened, understood in terms of environmental variables, such as materials and energy throughputs, and in social terms, such as labour conditions. Facing sustainability issues is an urgent need, both in environmental and social terms, such as dealing with global warming or forced migrations from Africa and Latin America. Proposals designed to overcome the current crisis are the promotion of further growth to get back on track after the pandemic. Investing Emergency Support Instruments of the European Union to enlarge the Spanish two biggest airports (Madrid and Barcelona) are good examples of the pro-growth policies of the Spanish government. The role of SME in making tourism industry more sustainable have to do, among others, with improving the working conditions, promoting proximity (in terms of materials and energy supply), using renewable energy sources, giving support to the local communities in terms of governance, gender bias promoting parity and equality, etc. More detailed analysis and proposals can be found in publications (Izcara & Cañada, 2021; Fletcher, et al. 2021) and social movement's debates, such as conducted by Alba Sud (https://www.albasud.org/).

4.19.4.2 Challenges for the development of sustainable tourism and for SMEs

Sustainable tourism is threatened by the rules of the current economic system, as far as it promotes rules of competence and greed that do not consider biophysical limits or social justices in terms of equity. Transnational corporations are favoured by this economic system and SME are experiencing their weakening and margination. This is to say that SME are the best contributors to sustainability as far as they can offer proximity not only in biophysical terms, but also in terms of better quality labour conditions and local governance.

4.19.4.3 Prospects and challenges with regard to the (post)-covid-19 situation

As the pandemic is amplifying the exposure of the weakest in tourism, demands from social movements to make tourism more sustainable must be attended. According to the Berlin Declaration on Transforming Tourism (Cañada & Murray, 2021), addressing the challenges of tourism in the context of COVID 19 means:

- Upholding the "leave no one behind" principle in recovery plans: Governments are requested to provide urgent and efficient support to the most vulnerable groups in the tourism sector, who are the workers in the formal and informal economy.
- Support tourism strategies that contribute to inclusive economic and social development.
- Guarantees in contracts and planning permissions should ensure that social and environmental sustainability and disaster preparedness are at the core of any new investments and that they do not harm traditional land use patterns.
- Support destinations to implement truly resilient tourism models that serve people in host communities and destinations.

4.19.4.4 Recommendations for boosting Sustainable Tourism for SMEs

The main question now is, how we make this transformation possible under new perspectives, not constrained by the current system contradictions (Fletcher, et al. 2021). The possibility is not a given, it is settled in the dispute, in the specific social struggles that determine what tourist capital can do and, in the capacity, to sustain different ways of production and consumption. And therefore, it implies social actors, such as SME, collectively organized, that resist and assert themselves by sustaining these desirable, viable and feasible alternatives with which to build a new horizon with hope (Cañada & Murray, 2021).

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4.20 Switzerland

Fabian Weber and Melanie Wyss
(As of June 2021)

4.20.1 Political framework for Sustainable Tourism

4.20.1.1 National Sustainable Tourism Policies and Strategies

In Switzerland, there is no Ministry of Tourism. The Federal Department of Economic Affairs, Education and Research is responsible for the Confederation's tourism policy. The State Secretariat for Economic Affairs (SECO) is responsible for implementing the Confederation's tourism policy. The current national political framework is the federal tourism strategy (Tourism Strategy of the Swiss Confederation). The federal government's tourism policy is currently based on the federal government's tourism strategy of November 15, 2017 (SECO, 2017a) and the implementation programme for 2016- 2019 of said tourism policy. The federal government's tourism policy aims to contribute to an internationally competitive tourism industry and an attractive and efficient tourism location. In doing so, it pursues the four objectives of improving framework conditions, promoting entrepreneurship, exploiting the opportunities offered by the digital economy, and enhancing of tourism products and market presence. Each of the four objectives consists of two fields of action, which are addressed through specific activities. The entire federal tourism policy is based on the principles of subsidiarity and sustainability. The principle of subsidiarity means that federal tourism policy supports private or other public actors whenever they are unable to perform tasks that lie in the public interest. The principle of sustainability demands consideration of the guidelines and goals of the Federal Council's current Sustainable Development Strategy.

The focus in the current strategy is on economic performance. In particular, the focus is on increasing the competitiveness and attractiveness of Swiss tourism and strengthening it as a provider of qualified jobs. The two other sustainability dimensions, society and environment, are taken into account insofar as negative impacts are to be avoided.

> *"The guidelines and objectives of the Federal Council's current sustainable development strategy are to be taken into consideration when implementing the Confederation's tourism policy. One of the priorities is 'economic performance' as a dimension of sustainability. Negative effects on the environment and society are to be avoided whenever possible. The aim is to protect natural resources and improve resource efficiency and/or separate tourism growth from the use of resources."* (*p. 68*)

In addition, resource efficiency is important in the environmental sector. A special role is played by the quality of the landscape, which contributes significantly to the attractiveness of Switzerland as a tourist destination. This includes building cultural qualities, intact natural and cultural landscapes, but also museums and other cultural sites and traditions (SECO, 2017a). These aspects are to be considered in both the ecological and the social dimension.

The strategy is currently under revision and there are efforts to include sustainability also on a higher strategic level and to strengthen sustainability in the tourism policy instruments (s. below).

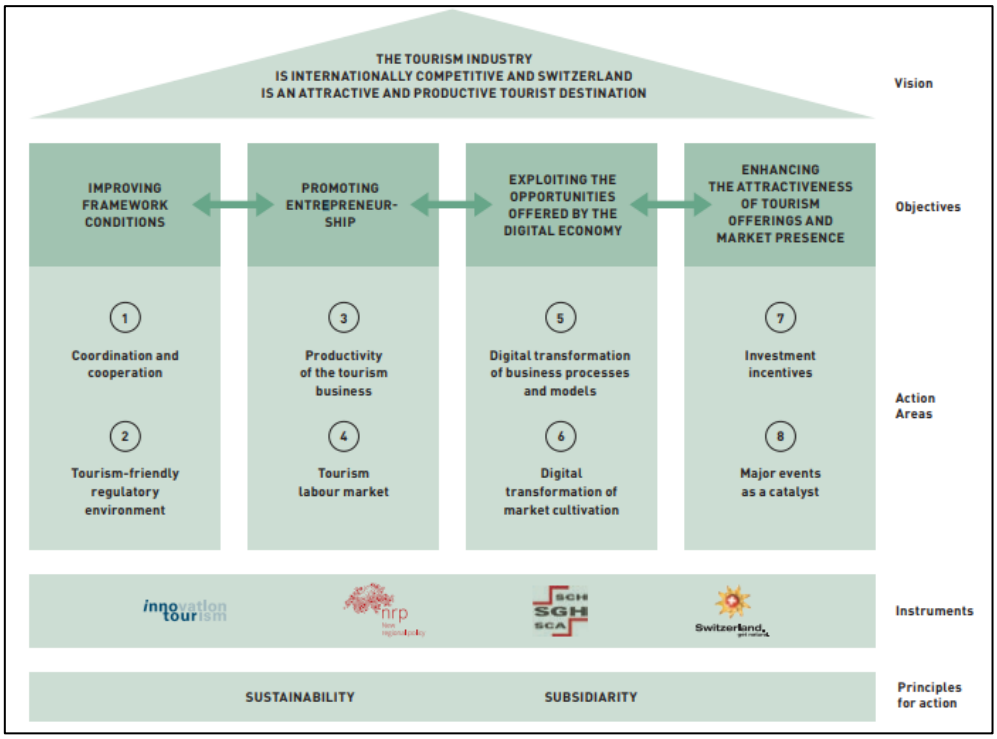

Figure 29: Overview of the Federal Council's tourism policy (*SECO, 2017a*)

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The tourism strategy is under revision and a renewed strategy has been published on November 10th, 2021. Sustainable development has gained in importance and occupies now a central position as an independent tourism policy goal in the Confederation's new tourism strategy (Swiss Federal Council, 2021).

Furthermore, also the national sustainability strategy *2030 Sustainable Development Strategy of the Federal Council* is an important political framework. This strategy is setting out how Switzerland intends to implement the 2030 Agenda for Sustainable Development over the next ten years. The strategy draws on the 2030 Agenda and the Sustainable Development Goals (SDGs) as a frame of

reference. Three key topics have been identified by the Federal Council: *'sustainable consumption and production'*, *'climate, energy, biodiversity'* and *'equal opportunities'*. They are considered as priority issues and have set goals for the period up to 2030, as well as strategic domestic and foreign policy guidelines for federal government policy. This strategy is currently as well revised and is still in consultation. Once the process has been completed, the Federal Council will also adopt an action plan to complement the strategy specifying objectives and strategic guidelines for the period 2021-2023.

The Federal Council has supreme political responsibility for Switzerland's sustainability policy. It has given the Federal Office for Spatial Development ARE the task of coordinating the implementation of a sustainability strategy (controlling implementation, as well as performing monitoring and evaluation tasks) at federal level, and also in collaboration with the cantons, communes, and other stakeholders. The MONET 2030 indicator system gives an overview of sustainable development in Switzerland, providing a picture of the progress made towards the 17 sustainable development goals (SDG) of the United Nations 2030 Agenda as well in relation to certain topics specific to Switzerland. Comprising over 100 indicators relating to the three environmental, social and economic dimensions, the system is structured around the 17 SDGs. There are two indicators that directly address tourism (tourism gross value added and tourism employment) but as tourism is considered a cross-section industry there are many other indicators that indirectly measure sustainable tourism development.

Furthermore, there are many policies and programs that are not directly implemented for tourism, but indirectly influence it. Such as a model project for sustainable spatial development, strategy for building culture (Baukultur), Green Economy Action Plan, national and regional park policy, CO_2 Law, CO_2 tax, climate change adaptation action plan, Biodiversity Action Plan, Action plan for non-motorized traffic, to name a few.

As mentioned above, SECO is responsible for the implementation of the tourism policy at the federal level. Furthermore, four promotion instruments are available for the implementation of the federal government's tourism policy: Promotion of Innovation, Cooperation and Knowledge Building in Tourism (Innotour), Switzerland Tourism (ST), Swiss Society for Hotel Credit (SGH) and New Regional Policy (NRP).

The figure shows the most important actors and promotion instruments of Swiss tourism policy.

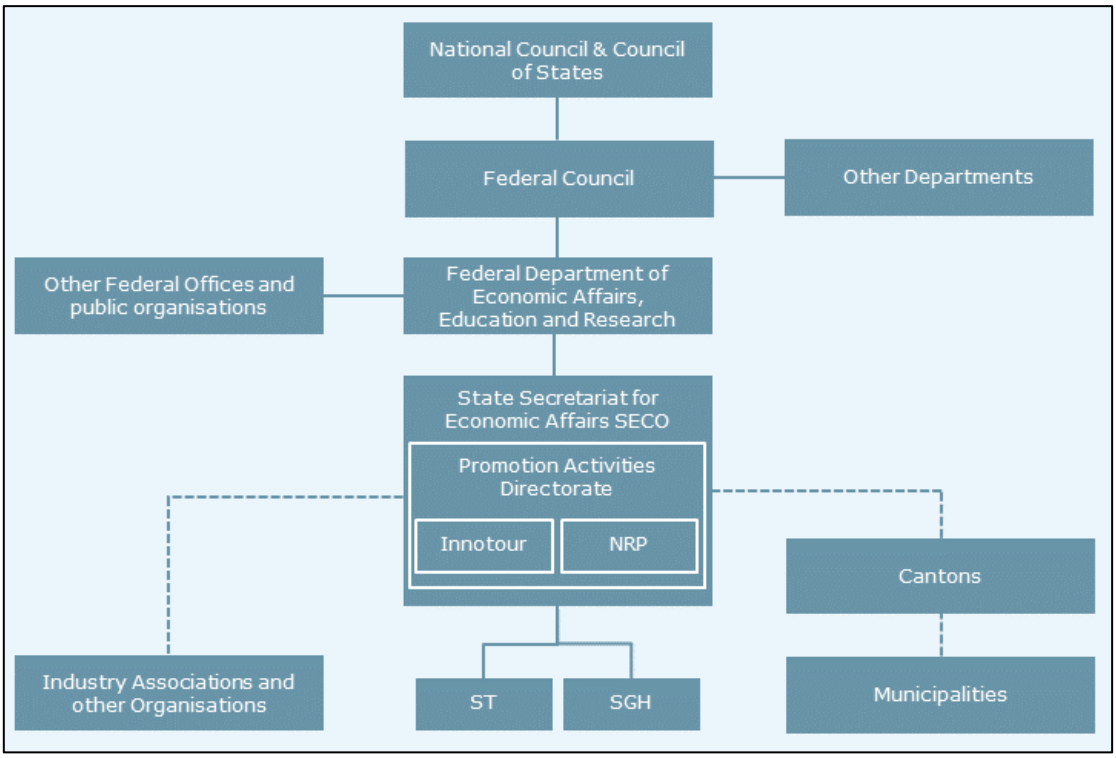

Figure 30: Actors and promotion instruments of the Swiss tourism policy [*translated by the authors*] (*Seco, 2017b*)

Switzerland Tourism (ST) is the marketing organisation of Swiss tourism mandated by SECO. Sustainability is a central focus for the 2021-23 strategy. They want to strengthen sustainable tourism in the future and also communicate it to the guests. To this end, with the new sustainability strategy Swisstainable, ST would like "to start an effective movement together with the entire Swiss tourism industry with the vision of becoming the most sustainable destination in the world." (Switzerland Tourism, 2021).

The sustainability program "Swisstainable" was developed to support the strategy (cg. Chapter 4.20.3.1). The entire tourism industry is invited to participate in Swisstainable. To provide orientation for guests, service providers who are committed to sustainability will be awarded a signet. These businesses will be presented as role models and integrated into guest communication.

4.20.2 Key Stakeholders

There are many stakeholders on different political, geographical or societal levels dealing with sustainable tourism development. The following sections give an overview of some of the relevant stakeholders without claim to completeness. In addition, it must be taken into account that stakeholders change and that new players are constantly emerging.

4.20.2.1 Governmental and semi-governmental bodies

The key stakeholder on a governmental level in Switzerland is the **State Secretariat for Economic Affairs (SECO),** but also other offices like the **Federal Offices for the Environment (FOEN) and for Spatial Development (ARE)** play a role in tourism development. Furthermore, another key player is the national tourism organization **Switzerland Tourism** (mandated by the SECO). Switzerland Tourism

is a federal corporation under public law tasked with promoting domestic and international tourism demand for Switzerland as a holiday, business travel and convention destination.

4.20.2.2 Tourism Associations

The national tourism association **Swiss Tourism Federation** is the umbrella organization representing other associations, regional tourism organizations and destination management organizations (DMOs). They coordinate the concerns of the various tourism stakeholders, represent their interests towards politics, authorities and the public, are active partners in the creation and further development of training in tourism. Within each sector of the tourism industry there are also different national associations for example **HotellerieSuisse** (national hotel association), **Parahotellerie Switzerland** (association for supplementary accommodation such as bed and breakfasts, camping sites, holiday homes and youth hostels), **GastroSuisse** (national hotel & F&B association), **Swiss Park Network**, **Swiss Working Group for Mountain Areas (SAB)** that promote various sustainability initiatives.

All renowned major tourism associations are among the cooperation partners of the Swiss Sustainability Programme "Swisstainable" (s. below): Switzerland Tourism, Swiss Tourism Federation, GastroSuisse, HotellerieSuisse, Parahotellerie Switzerland, Conference of Swiss Regional Tourism Directors (RDK), Network of Swiss Parks, Cable Cars Switzerland, Swiss Snowsports, Association of Public Transport, Association of Swiss Shipping Companies, Association of Swiss Tourism Managers, Swiss Travel Association.

4.20.2.3 NGOs, Sustainable Tourism Networks and Partnerships

There are many different organizations that deal more or less intensively with sustainable tourism development.

A central NGO is **Fairunterwegs,** a non-profit organisation with a critical perspective on tourism development. The **Swiss Foundation for Solidarity in Tourism** (https://www.sstfoundation.org/en) supports sustainable tourism projects and organisations in Switzerland and worldwide. Furthermore, there are several development organizations that deal with sustainable tourism from time to time or that even have tourism projects in developing countries such as for instance **Helvetas** or **Swisscontact**.

The Swiss Tourism Dialogue on SDGs (**SwissTourism4SDGs**) is a broad-based initiative supported by the State Secretariat for Economic Affairs SECO to anchor the Agenda 2030 with its 17 sustainable Development Goals (SDGs) in the tourism industry. The Swiss SDG Tourism Dialogue does not develop its own measures to help reach the SDGs more effectively but supports initiatives by finding suitable partners for them, tapping into missing knowledge and actively communicating these initiatives within the network.

In addition, there are some specific groups for the exchanges amongst professionals dealing with sustainable tourism on social media platforms like Xing or LinkedIn.

The Swiss Tourism Federation hosts the "**Fachgruppe Natour**" where the persons responsible for sustainability from the different tourism regions exchange on a regular basis. Other networks are

more specific such as the **Swiss Park Network** that enhances the dialogue, exchange and knowledge transfer between the Swiss nature parks.

Furthermore, there are many associations, clubs or NGOs dedicating themselves to specific aspects of sustainable tourism like climate emissions (e.g. **myclimate**), food waste (e.g. **united against waste**) or accessibility (e.g. **OK GO**).

4.20.2.4 Relevant research and educational bodies

The tourism institutes of different universities and applied universities are relevant research partners regarding sustainable tourism development. They are involved in various multistakeholder projects between the tourism industry, governmental actors and consultancy partners. A central player regarding sustainable tourism research is the **Institute of Tourism and Mobility of the Lucerne University of Applied Sciences & Arts**, which has many years of experience and expertise in the topic. Other relevant players are the **Tourism Research Unit of the University of Berne,** the **Research Unit Tourism and Sustainable Development of the ZHAW Zurich University of Applied Sciences** and the **Institute for Tourism and Leisure of University of Applied Sciences of the Grisons**.

4.20.2.5 Individual tourism businesses and destinations of particular relevance

Even though there is still a lot of potential in terms of sustainable development and there are relatively few certified businesses overall, there are many very committed businesses and good practices in Swiss tourism when it comes to sustainability engagement.

On a destination level, the destination **Engadin Scuol Samnaun Val Müstair** can be highlighted with a long history of sustainable development, currently on the way to becoming the first destination in Switzerland certified by TourCert (third-party audited sustainable tourism certification). Also, the **Morges** region in the Western part of Switzerland follows an innovative approach. They decided to become a "Slow Tourism" destination based on its flagship activities, i.e. the prevailing natural values and local craftsmanship. Many Swiss Natural Parks are considered exemplary in terms of sustainable development, especially the **UNESCO Biosphere Entlebuch**.

Zurich can be mentioned as a good example for a city destination being active on many different levels from environmental management to accessibility with good ranking in many well-known sustainability indices.

In the accommodation sector, the **Swiss Youth Hostels** serve as a good example, since sustainability is an integral part of the organization’s philosophy when dealing with stakeholder groups, designing their products and ensuring environmental protection. All hostels are certified by the sustainability certification Ibex Fairstay.

There are also exciting examples of mountain railways that attach great importance to sustainable development such as **Niesen Bahnen** with several initiatives from energy saving to food waste or the **Rigi Bahnen** which were among the first mountain railways to become certified by TourCert.

4.20.3 Activities and instruments for the development of sustainable tourism

4.20.3.1 Sustainable Tourism Initiatives, Projects or Campaigns

In 2021, Switzerland Tourism launched the new sustainability programme **"Swisstainable"** that was developed by the Institute of Tourism & Mobility of Lucerne University of Applied Sciences and Arts. With the Swisstainable communication campaign, Switzerland Tourism (ST) creates awareness for a long-term sustainability strategy. The Swisstainable campaign has the following objectives: (1) create guest orientation by bundling, preparing, and curating sustainable experiences and offers, (2) support and inspire the industry and generate visibility for sustainable experiences and offers of the service providers, (3) positioning of destination Switzerland as a sustainable travel destination committed to sustainability. The sustainability programme is open to all businesses and organizations in Swiss tourism: Businesses that already have comprehensive sustainability certification and also businesses that now want to embark on the path to more sustainable development. Depending on the prerequisites and level of commitment, the programme is divided into three levels: Level I - committed, Level II - engaged, Level III - leading. The programme acknowledges many different labels and certificates. The comprehensive list of more than 60 labels and certificates (most of them exist only in Switzerland) can be found on the **Swisstainable webpage.**

One widespread initiative is the **Cause We Care** programme by myclimate. Companies participating in the programme offer their guests to offset CO_2 emissions and double this amount with their own funds. The money is then invested in offset-projects as well as in local environmental measures.

An interesting initiative in the field of cultural valorisation is **Foundation Holidays in Historical Buildings,** a project at the interface of tourism and the preservation of historical monuments. Throughout Switzerland, it takes over architectural monuments that have fallen into disrepair and are threatened with demolition, restores them gently and gives them a revitalized future as vacation properties.

There are initiatives amongst others in the field of food waste (e.g. **united against waste**), accessibility (e.g. **OK GO, Claire & George**), sustainable mobility (e.g. car free destinations, luggage service from door to door from the Swiss Federal Railways) or resource efficiency (e.g. **Energy Agency for the Economy (EnaW), Subsidy programme «Saving hot water Switzerland» (from myclimate), Financing Tool Energy Saving Contracting, Subsidy programme HotelWatt** which helps hotels to save electricity by replacing old/inefficient equipment with the help of subsidies). Furthermore, there are various information & awareness campaigns (e.g **Respect your Limits** campaign which sensitizes tourists on the impact of wildlife disruption, or the initiative **I AM PRO SNOW** which has several famous winter sport athletes as ambassadors for climate action in winter sport destinations. In the committed initiative of I AM PRO SNOW, the ski resorts of LAAX, Arosa Lenzerheide and Saas-Fee commit to 100% renewable electricity. Swiss athletes are inviting snowsports fans to do the same.), as well as tools and manuals from and for different tourism stakeholders (e.g. **Manual on sustainable product development in tourism** or the **Handbook Sustainability in Swiss Tourism Destinations**) for capacity building and sharing of best practices. There are also many **regional and local initiatives** such as 100% Val Poschiavo or other initiatives like the 12 labels that promote the regional products in the Swiss Natural Parks (e.g. UNESCO Biosphäre Entlebuch, Parc Jura Vaudois).

4.20.3.2 Marketing and information services supporting sustainability in tourism

There are many different and relevant marketing and information services that address sustainable tourism in Switzerland. An extract of these various handbooks and manuals can be found in the excel work sheet. Some of the most relevant are listed and shortly described below.

The Swisstainable communication initiative offers orientation for coherent and consistent marketing of the various forms of sustainability initiative by using an umbrella label. The operators cooperating under the Swisstainable label are also marketed more specifically by the national DMO. Furthermore, there are many helpful resources to learn more about sustainable tourism and concrete product development (e.g. **Manual on sustainable product development in tourism**) and just recently a comprehensive handbook **Sustainability in Swiss Tourism Destinations**) with concrete recommendations for destinations to promote capacity building and sharing of best practices. Also, platforms like the **Swiss SDG4Tourism** or transfer-workshops **Walk the Talk** to name a few.

4.20.3.3 Tourism Sustainability Certification Systems and Awards

There are different certifications, labels and awards available for SMEs and destinations, details and links can be found in the excel worksheet. Some relevant schemes that are Swiss and tourism specific are for example

- **Swisstainable:** Sustainability programme and communication initiative from the national DMO that recognizes and coherently markets already existing sustainability initiatives under the umbrella label *Swisstainable engaged* and *Swisstainable leading* and gives a guiding opportunity to commit to sustainability action under *Swisstainable committed.*
- **ibex fairstay:** Swiss-based sustainability certification for hotels, hostels and clinics. They accompany and certify businesses on their way to sustainable management and show practical possibilities for improvement and optimisation based on a catalogue of measures and calculations. It is accredited by a third-party auditor and revised every three years.
- **Gout Mieux:** awards catering establishments that source at least half of all food from animal and environmentally friendly production (organic, regional, Fairtrade).
- **Ecocook:** Sustainable Restaurant Certification Programme
- **Valais Excellence:** recognizes companies that operate according to the principle of sustainable development and continuous improvement. The label is based on a certification according to ISO 9001 (quality management) and ISO 14001 (environmental management). Certification is possible for all companies and organizations of all sectors and sizes, which are located in the canton of Valais.
- **EQUAL-SALARY:** The certification analyses the pay gap between men and women for the same work. The difference must be ≤5% and the regression coefficient ≥90%. On-site visits are conducted to verify: (1) management commitment to equal treatment of men and women, (2) integration of equal pay and opportunity strategies into HR processes and policies and (3) employees' perceptions of the company's equal treatment practices.
- **Swiss LGBTI Label:** The Swiss LGBTI Label is awarded to organizations that, as part of a holistic the diversity dimension of sexual orientation, gender identity and gender sexual orientation gender identity and gender characteristics through systematic measures and live openness and inclusion in their daily practice.

- **OutNow:** Switzerland Tourism offers an LGBT programme together with the LGBT consultancy specialist OutNow. Participants in the programme receive LGBT awareness training for team members, OutNow certification for their hotel and valuable LGBT promotional opportunities. Partner hotels of Switzerland Tourism benefit from free LGBT travel training. With the OutNow certification, the establishment receives the attestation that the team is ready to welcome LGBT guests and give them the opportunity to relax.
- **Fait maison:** The "Fait Maison" (Homemade) label recognizes restaurants that prepare all or most of their food in their kitchens, without using ready-to-cook products and ready-made meals. The requirements include signing a charter, designing the menu accordingly, and an initial inspection by the label organization.
- **Fourchette Verte:** Fourchette Verte stands for a label in the field of balanced and sustainable nutrition. The Fourchette Verte criteria are based on the recommendations of the Swiss food pyramid. In particular, they include specific plate models for optimally balanced meals.
- **Sustainable Company:** The label is aimed at trade show companies and companies in the communications industry. Using a catalogue of criteria covering eleven areas, companies are screened for various aspects of sustainability (energy, waste, employee responsibility, etc.).
- **OK:GO (Accessible Switzerland):** OK:GO promotes the availability of information on the accessibility of tourist businesses for all of Switzerland.

Another range of labels used for sustainable tourism in Switzerland come from other sectors but are nonetheless important for a sustainable tourism development.

- **SGNI** (Swiss Society for Sustainable Real Estate Management): aims to optimize the properties over their entire life cycle in the optimized interaction of building, user and operation. Sustainable construction is the basis, but only through sustainable operation and sustainable interaction of the users with the building can sustainability be implemented in the long term.
- **Minergie** (Energy): Minergie is a Swiss building standard for energy-efficient and modernized buildings.
- **EcoEntreprise:** The EcoEntreprise programme supports companies in setting up a management system, evaluating the company's activities and identifying the potential for improvement in the areas of sustainable development and social responsibility (according to ISO 26000). Based on the standards of EcoEntreprise, certification is possible, which is carried out by an independent external audit of an accredited body.
- **Entreprise Citoyenne:** The award of the "Entreprise Citoyenne" label is based on prior certification to the ISO 9001 - Quality Management System - and ISO 14001 - Environmental Management System standards. It requires compliance with a number of additional requirements arising from the ISO 26000 specifications in the areas of corporate governance, human rights, working conditions, environment, fair practices, respect for customers and civic engagement.
- **B Corp:** Certified B Corps are companies that have demonstrated compliance with the highest standards of social and environmental performance, legal corporate responsibility, and public transparency. This includes a "B Impact Assessment" and certification. Based on

the assessment documentation and review calls, compliance with the requirements is verified.

- **Kultur inklusiv (culture inclusive)**: As label partners, cultural institutions commit themselves to orienting their attitudes and actions towards inclusion, together with people with disabilities. They recognize the "Charter for Cultural Inclusion" and undertake to implement inclusive measures in the five fields of action of the label (cultural products, content-related access, structural access, work offerings, communication).
- **Pays Gourmand** (regional products): Pays Gourmand is based on the criteria of *regio.garantie*, the national label for regional products. The label can be aspired to by establishments in the French-speaking part of Switzerland. For this purpose, the *regio.garantie* criteria must be met with regard to the regional origin of the products and the number of dishes offered accordingly. Compliance with these criteria is regularly checked.

Furthermore, internationally renowned sustainability certification schemes are also used in Switzerland (e.g. TourCert, Earth Check, Green Globe).

Overall, the number of certified establishments is relatively low. In the field of accommodation, the **Ibex Fairstay** certification is one of the labels with the most certified establishments, as all youth hostels have joined the programme. Furthermore, there are some establishments with **Green Globe, Green Key** or **Green Sign** awards. In gastronomy, the **Fourchette verte, Fait maison, Goût Mieux** and **EcoCook** labels are among the most widespread.

Among tour operators, there are some establishments with **TourCert** or **Travelife** certification. Furthermore, there are many tourism businesses that are **ISO 14001** certified (often in combination with ISO 9001).

In the energy sector, the models of the Energy Agency for the economy (**EnaW**) and **Act Cleantech** are among the most widespread. In addition, there are some companies with certifications for energy-efficient buildings (such as **Minergie**). When it comes to reduce carbon emissions, the **Cause We Care** programme is growing strongly.

Programmes for tourism companies that provide information on accessibility are also quite widespread (**ProInfirmis, OK GO, Claire & George**).

4.20.4 Summary and conclusions

Sustainable development is gaining in importance in the Swiss tourism industry. This is reflected in the tourism strategy from 2017, in which sustainability is a basic principle, and became even more evident in the revised and recently published tourism strategy in November 2021. Sustainable development now occupies a central position as an independent tourism policy goal. Next to the Federal Council's tourism policy, the national sustainability strategy *2030 Sustainable Development Strategy* is also an important political framework. Regarding the implementation of sustainable development initiatives there are many stakeholders on different political, economic or societal levels dealing with the sustainability transition in tourism. Alongside the many initiatives from the tourism industry, associations, NGOs etc., the launch of the *Swisstainable Programme,* a communication-initiative of the national DMO, is considered an important catalyst to stimulate more sustainability measures and make existing efforts visible to tourists. As it is not an additional

certification programme but rather acts as an umbrella brand for existing sustainability initiatives (be it sustainability labels, certifications, or other measures) it unites the many and valuable bottom-up initiatives in Switzerland and gives them visibility. As the national DMO is initiator of this initiative, it also receives top-down support. In the revised tourism strategy (Swiss Federal Council, 2021), for example, the anchoring and rolling out of the Swisstainable initiative in the Swiss tourism industry as well as the further development of Swisstainable are to be supported and promoted by SECO within the framework of tourism policy promotion instruments in the coming years. This illustrates well how different bottom-up approaches coming directly from the tourism industry and private sector can be interlinked with the unifying power and financial capabilities of a top-down approach of state actors.

4.20.4.1 Ambitions and achievements regarding sustainable tourism and the role of SMEs in it

In Switzerland, there are already many tourism service providers who are already committed to sustainable development and showcase their sustainability initiative. The active engagement of SME plays a crucial role in implementing all these different initiatives which have been developed in recent years. As tourism is a cross-sector industry, also achievements from in other sectors are highly relevant, such as achievements in the energy, mobility, or agricultural sector as indicated in 4.20.3.3. In general, there is momentum for sustainability initiatives and a growing interest also from consumer perspectives. Switzerland has furthermore a longstanding history of business and innovation-friendly framework conditions which leads to innovative and creative business models of SME to deal with the sustainability challenges in tourism.

4.20.4.2 Challenges for the development of sustainable tourism and for SMEs

Although there are already good examples of sustainable tourism initiatives out there, a broader mobilisation of SME is still needed to achieve the ambitious goals of the 2030 Agenda. Therefore, further awareness creation, incentive programs and pressure from the demand side remain essential to reach more support. In addition, the COVID-19 pandemic has posed majors challenges to the tourism industry. The resilience and agility of tourism businesses is becoming more important than ever. However, it is also critical to use these challenges wisely to move towards a sustainable tourism future. Nevertheless, the short-term challenges in terms of the survival of the tourism industry can create a dilemma when it comes to investing in long-term sustainability measures today.

4.20.4.3 Recommendations for boosting sustainable tourism for SMEs

As outlined in this report there are already many different ongoing initiatives to promote sustainable tourism development in Switzerland. However, sustainability is sometimes still considered a niche form of tourism and therefore, further awareness creation and best-practice exchange among SME needs to be facilitated. Furthermore, the complexity of sustainability can also lead to frustrating feelings of not knowing where to start. Additionally, the COVID-19 pandemic currently also plays a major role of how much focus is given to the topic of sustainable tourism development. On the one side it has been observed as a catalyst to inspire resilient changes, in the spirit of rethinking previous negative tourism impact on the environment and society. On the other side, it can also trigger a feeling of overwhelm as too many challenges have to be overcome at once. National initiatives like the Swisstainable Programme can help to create such awareness and offer easy tools to get started.

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4.21 Turkey

Dilek Hale Sipahi Aybar and Onur Selçuk
(As of August 2021)

Introduction

The fact that mass tourism has become the dominant character in the post-1980 period in Turkey and its promotion by public policies has caused tourism to be concentrated in a very narrow area spatially, especially in coastal areas. It has been understood that this situation is not sustainable, and priorities have been started to be determined in order to balance the tourism process in the basic policies and strategies and planning.

The first of the country's current agenda regarding sustainable tourism is the spread of tourism activities throughout the country. Although this issue is constantly mentioned in policy documents, tourism activities are still very clearly concentrated in coastal areas. Considering the arrivals at the tourism facilities, it is understood that 86% of the total arrivals in 2016 were realized in 5 provinces (Antalya, Istanbul, Mugla, Aydin and Izmir). These results show us that the country's tourism is spatially confined to a very small geographical area (Kervankıran & Çuhadar, 2016). Another agenda is the dependence of the country's economy on tourism. Macro-economic problems and the dependence of the economy on tourism-based foreign exchange revenues make it difficult to transform from tourism that consumes resource values to sustainable tourism (Tosun, 2001). As a matter of fact, the plane crisis with Russia in 2015 and the international travel bans in the COVID 19 period since 2019 have created negative economic effects in the field of tourism.

4.21.1 Political framework for Sustainable Tourism

4.21.1.1 National Sustainable Tourism Policies and Strategies

Tourism policies in Turkey were carried out without a main policy document until the 1980s. In this period, the main determinants of tourism policies were development plans and the reports of the Committee on Specialization. With the development plans, the tourism sector has been continuously expanded and the numerical targets have been tried to be achieved. In the absence of sectoral plans and strategies, development plans have been decisive in the development of tourism (Kervankiran, 2015). With the Fifth Five-Year Development Plan (1985-1989), the Tourism Bank provided the opportunity to use its funds as loans instead of making direct investments. Thus, the state vacated direct management in the tourism sector and adopted only infrastructural investments. In addition, with this plan, for the first time, the country's historical, archaeological and cultural assets, winter, hunting and water sports, festival, health and youth tourism, as well as other existing tourism potential, started to be evaluated in line with sustainable tourism principles. This plan is important in that it is the first plan in which tourism policies for the development of alternative tourism styles and the adoption of sustainable tourism are on the agenda in Turkey. The concept of “Sustainable Tourism” was first used in the Ninth Development Plan (State Planning Organization, 2007). In the Tenth Development Plan, sustainability in tourism was adopted as a basic principle (Ministry of Development, 2013).

The Tourism Strategy of Turkey 2023 and the Tourism Strategy Action Plan of Turkey 2007/2013, which include current policies and strategies related to sustainable tourism, were approved by the Planning Board Decision dated February 28, 2007 and numbered 2007/4. It entered into force by being published in the Official Gazette dated March 2, 2007 and numbered 26450. In the Strategy and Action Plan, a framework has been established in terms of sustainable tourism for the development of tourism (Ministry of Culture and Tourism, 2007). The documents adopting the strategic approach also acknowledge the importance of the strategic planning process and this being an effective tool for sustainable tourism management.

The Tourism Strategy of Turkey (TST) 2023 aims to increase employment by adopting a sustainable tourism approach and to make tourism a leading sector in regional development. In TST, it is predicted that the tourism sector in Turkey will achieve its development target based on competitive, innovative and research-based sustainability principles. The strategy document includes practices that adopt a sustainability approach in solving environmental and ecological problems created by regional development and mass tourism. In addition, the document includes action plans to diversify tourism. At the same time, practices aiming to remove the environmental pressures created by sea tourism are included. The document presents long-term strategies for Turkey's Tourism Strategy Investment, Organization, Domestic Tourism, Research and Development (R&D), Service, Transportation and Strengthening Infrastructure, Advertising and Marketing, Education, Branding as a Municipality, Diversification of Tourism, and Rehabilitation. In addition, it was stated that among the 2023 targets, carrying capacity measurement will be conducted in existing and new development regions, and the implementations would be carried out "without exceeding their carrying capacity". In addition, when the Tourism Strategy Action Plan of Turkey 2007-2013 is examined, 11 of 172 Actions are in line with the sustainability targets. It was stated that strategic planning is a flexible, transparent, accountable, participatory and sustainable development planning in management and implementation stages, and that tourism planning should adopt this approach.

In order to evaluate the current situation of the tourism sector and to create a national tourism policy for the future, the 3rd Tourism Council was organized. The emphasis on sustainable tourism came to the fore in the council. The main purpose of the council was determined as "*having a sustainable tourism industry*". Among the 13 titles determined within the scope of the council, the title of "*product diversity and sustainability in tourism*" was included and a final report was prepared by convening a commission on this subject. As regards to assessment of the Commission, an Action Plan consisting of 92 actions was prepared under the titles of legislation-organization, promotion-marketing, planning-infrastructure, incentives and education-employment. Actions directly related to sustainable tourism in the action plan are described as follows:

- "Action 59; Planning and dissemination of product diversity in tourism within the framework of sustainable tourism understanding. In order to develop local development and employment, and to reduce interregional development imbalance, studies should be carried out to benefit from all the riches of the country that can serve tourism within the framework of sustainable tourism approach.
- "Action 66; Observing the carrying capacity and the balance between protection and use in the announcement process of tourism areas. In the determination of tourism centres and culture and tourism protection and development zones to be announced by the Ministry of

Culture and Tourism, studies will be carried out taking into account the sustainability of environmental values and considering the carrying capacity and protection-utilization balance in order to evaluate them in the tourism sector.

- "Action 77; Developing and disseminating certification systems aimed at protecting the environment, increasing environmental awareness, and promoting it within the scope of sustainable tourism. By creating support and incentive mechanisms for the use of renewable energy sources, conversion of waste organic foodstuffs to compost, evaluation of wastewater and meals, etc. Studies will be carried out to expand and promote the facilities that use environmental protection approaches."

"Turkey's Sustainable Development, Future Embracing 2012 Report" and "Turkey's Current Situation Analysis Project Draft Report within the Scope of Sustainable Development Goals" were prepared to identify and encourage sustainable development initiatives in the country. In the Future Embracing 2012 Report, it was stated that a sustainable tourism model could be implemented if alternative diversity could be presented (Ministry of Development, 2012). In addition, it was stated that the tourism sector has an important role in economic development with its capacity to reduce the current account deficit, and it can also positively affect social and environmental developments due to the opportunities it offers for sustainable development. In addition, warnings regarding the effects of tourism on special environmental protection zones, wildlife and local vegetation, especially coastal areas, were included. The Turkey's Current Situation Analysis Project Draft Report within the Scope of Sustainable Development Goals considers the Agenda 2030 Sustainable Development Goals, which determined 17 Sustainable Development Goals and 169 Sustainable Development objectives. In this context, there are two valid targets for tourism in Turkey:

- "Goal 8.9: By 2030, formulate and implement policies to support sustainable tourism that creates jobs and promotes local culture and products"
- "Goal 12.b: Develop and implement tools that allow monitoring the impacts of sustainable development for a sustainable tourism that creates jobs and promotes local culture and products"

4.21.1.2 Policies and Strategies for Sustainable Tourism at Regional Level

One of the fulfillment criterias for EU membership process, Turkey is obliged to, is NUTS[34]. Its purpose was defined as "defining the regional policy framework, making socio-economic analysis of the regions and producing comparable regional statistical data at the European level" by the Council of Ministers (2002) and created a 3-level-regional-system within the country. 81 provinces were defined as Level 3, and "neighboring provinces with economic, social and geographical similarities, considering regional development plans and population sizes", were determined as Level 1 (12 regions) and Level 2 (26 sub-regions) (see Figure 30, European Commission, 2021). These regions are not administrative but statistical units (GMKA, 2021).

[34] The Nomenclature of Units for Territorial Statistics (NUTS) is a statistical subdivision standard by Eurostat (2021).

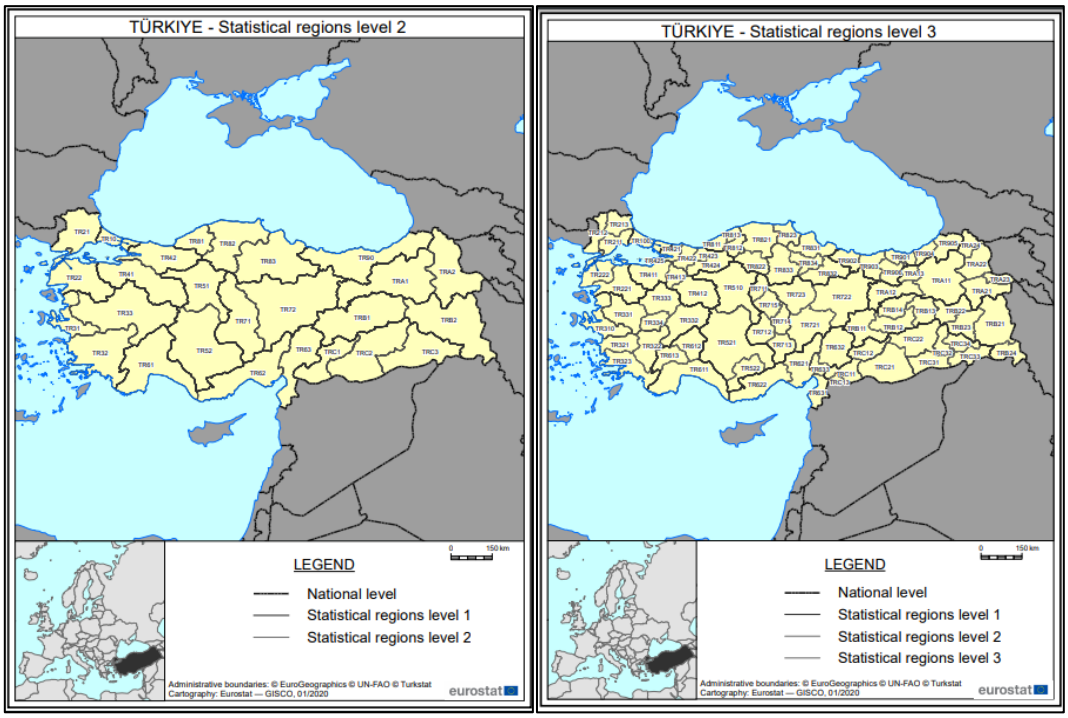

Figure 31: Turkey Statistical regions

The socio-economic development efforts put forward in the first years of the Republic (1923-1950) continued with the planned development period since 1960. Today, socioeconomic development plans prepared according to the legislation that constitutes the legal and administrative framework of the Turkish planning system are divided into two as National and Regional Development Plans. Turkish national development plans also include various plans and projects in terms of regional development (Antalya Project, East Marmara Planning Project, Zonguldak Project, Cukurova Region Project, Dicle Valley Project, Keban Project and, after 1980, GAP, DAP, DOKAP, Zonguldak, Bartin, Karabuk, Yeşilirmak Basin Development Plan) brought with it (Toy, 2015).

In Turkey, an important step has been taken in the context of regional governance by associating NUTS Level 2 regions with development agencies and assigning agencies to prepare regional development plans. Although the NUTS Level2 regions do not have an administrative nature and the regional development plans prepared are not fully positioned in the planning hierarchy of Turkey, the administrative structure of the Regional Development Agencies (RDA) and the participatory approach they display in the plan preparation processes are developments that can be considered as important in terms of taking local actors into account in directing regional development (Citizens Assembly, 2021).

Regional studies are becoming more important in terms of spreading the country, which is the first agenda item related to sustainable tourism throughout the country. When planning tourism for a region, it is necessary to consider not only the economic consequences of tourism but also its environmental effects. It is possible to control the negative effects of tourism with a conscious planning. The first step for this is to determine the carrying capacity of touristic areas. It is strongly recommended to develop tourism by protecting archaeological, historical, and cultural assets, especially natural resources, to plan tourism activities on a small scale and to ensure the participation of the people of the region in the decision-making mechanism. Within this scope,

master plans for each city prepared within the bodies of Governorships under the coordination of Provincial Culture and Tourism Directorates at the regional level in Turkey (Katircioglu et al., 2019).

4.21.2 Key Stakeholders

4.21.2.1 Governmental and semi-governmental bodies

Ministry of Culture and Tourism

The Ministry of Culture and Tourism is placed at the top of the structure for sustainable tourism in Turkey. One of the various commissions established within the scope of the 3rd Tourism Council held in Ankara between 1-3 November 2017 is the Commission for Product Diversity and Sustainability in Tourism. Within the scope of the Commission on Product Diversity and Sustainability in Tourism; 15 topics, including sustainability in tourism, sea tourism, nature-rural tourism, wedding tourism, accessible tourism, event tourism, film tourism, halal tourism, camping and caravan tourism, cruise tourism, culture and archeology tourism, luxury train tourism, luxury tourism, health tourism and sports tourism were discussed.

Turkey Tourism Promotion and Development Agency (***TGA***)

According to strategies and policies on tourism set by the Ministry of Culture and Tourism, the Turkey Tourism Promotion and Development Agency (TGA) is founded to carry out all promotion, marketing, and communication activities to serve Turkey's tourism goals, promote and market current tourism opportunities across the globe as well as discover, improve, and establish potential areas of tourism on 15th July 2019 (Turkey Tourism Promotion and Development Agency, 2020).

Regional Development Agencies (***RDAs***)

Regional Development Agencies (RDAs) are legal entities coordinated by the Ministry of Industry and Technology. RDAs have been established without investment statement to develop the cooperation between the public sector, private sector, and civil society, to provide meaningful and effective use of regional resources, to accelerate regional development, to provide sustainability and to reduce inter-regional and intra-regional development differences. Also, they aim to create a regional development momentum and to discover regional potential and develop cooperation between the public sector, private sector, and civil society. In Turkey, there are 26 different Development Agencies that have been established based on NUTS 2 regions. Their works are regulated by "Law on The Establishment and Duties of Development Agencies" (No. 5449).

The City Council

The City Council implements the basic principles of the city and urban life in the United Nations Summits and other international conventions signed and approved by the Republic of Turkey. Its duties include (City Council, 2021):

- To ensure sustainable development and to prepare and implement plans for the solution of the problems that arise in this regard,
- To contribute to the creation of a common mind covering the whole city in the determination of basic strategies and activity plans regarding the city, and in the implementation and monitoring processes,

- To protect and develop the historical, cultural, natural, and similar values related to the identity of the city,
- Contributing to the effective, efficient, and fair use of urban resources,
- To support environmentally friendly and poverty-reducing programmes that improve the city's quality of life based on a sustainable development approach,
- Contributing to the implementation of the principles of transparency, participation, accountability, and predictability in city management,
- To ensure that the opinions formed in the city council are sent to the relevant municipality for evaluation.

4.21.2.2 Tourism Associations

Ecotourism and Sustainable Tourism Society

The mission of the society is defined in their web site as "Our association which presents the principles of travelling "responsibly" for nature, for the environment, and for local cultures, reminds us of our responsibilities towards our planet and for sustaining life here and now without being corrupted" (Ecotourism and Sustainable Tourism Society, 2021).

The International Sustainable Tourism Association (***USTUD***)

The association was established with the idea of tourism being more conscious, respectful of its environment and nature, contributive to local people and their culture, advancing the tourism potential of the country and carrying it to the future by improving on the current situation. In this regard, its aim is to ensure that the local people benefit from tourism as well, therefore promoting sustainability, environmental conservation, protection and boosting of cultural values, and to support tourism with high added value (USTUD, 2021).

The Turkish Tourism Investors Association (***TTYD***)

TYD is a private non-governmental initiative whose main objective is to bring together entrepreneurs investing in the tourism sector and provide consultancy in their problems and future plans. The Association sees investment in tourism as the power behind the development process of the sector and the country's economy and believes that it has a role in the expansion and orientation of the Turkish tourism (TTYD, 2021).

4.21.2.3 NGOs, Sustainable Tourism Networks and Partnerships

CEKUL (***Foundation for the Protection and Promotion of the Environment and Cultural Heritage***)

One of Turkey's leading heritage NGOs, the Foundation for the Protection and Promotion of Environment and Cultural Heritage (CEKUL), strives to create a nationwide environmental awareness and network for the protection of urban and rural, built, and natural areas. CEKUL was founded in 1990 by a group of intellectuals, mostly academicians. Concerned about the impact of uncontrolled urban development and rural migration, they joined forces to form an organization that would act as guardians of Turkey's threatened natural resources and cultural heritage. (CEKUL, 2021).

TURSAB (***Association of Turkish Travel Agencies***)

It aims to contribute to the Turkish Tourism Sector and the Travel Agency profession, and to develop an innovative and sustainable perspective suitable for the digital age so that its members can assume a more active, powerful, and effective role in national and international platforms. With this understanding, the Association adopts to act within the framework of the Turkey Tourism Goals, the United Nations Sustainable Development Goals and the Global Code of Ethics for Tourism determined by the World Tourism Organization (UNWTO). Its mission is “It represents the tourism sector effectively, increases social awareness, follows a proactive approach in the development of legal regulations, improves the performance of its members and employees, controls the competitive environment, organizes training activities that will contribute to the professional development of Travel Agencies and raises the service standards in the sector” (TURSAB, 2021).

TURSAB has 36 regional branches in Turkey, a high school, and an academy. Moreover, the TURSAB Route project has been initiated with the understanding of offering different tourism products to every corner of our 81 provinces for 12 months, with the best service quality. Within the scope of this project, it aims to bring together member travel agencies to offer different tourism products suitable for every budget, by emphasizing local and cultural values and natural beauties. Under the framework of a project, a mobile application was created, and everybody can download it on their own mobile devices to explore touristic facilities in the destination.

TURCEV (***Turkey Environmental Education Foundation***)

TURCEV was established in 1993, by the leadership of the Ministry of Tourism, with the aim of launching the Blue Flag Program in our country (TURCEV, 2021). It is the only authorized institution of FEE (Foundation for Environmental Education) in Turkey. Following, under the umbrella of FEE; in 1995, Eco-Schools and Young Spokespersons of the Environment and, in 2004, the Schools Forest Programs started to run in Turkey. In 2011, the International Green Key Award Program started to be carried out in our country. Moreover, the "Theoretical Approaches and Practical Implementations in Environmental Education-YUNUS" project, in partnership with the Hellenic Society for the Protection of Nature (HSPN) and the Turkish Environmental Education Foundation (TURCEV), has been approved by the Central Finance and Contracts Unit (CFCU).

Western Mediterranean Ecotourism Platform

Under the leadership of the West Mediterranean Development Agency, it is aimed to create a platform consisting of representatives of public, private sector and non-governmental organizations operating in provinces of Antalya, Isparta and Burdur to develop a joint strategy for ecotourism.

Local Agenda 21

Local Agenda 21 practices in our country gained momentum at the end of 1997 within the "Encouragement and Development of Local Agenda 21s in Turkey" Project. The project emphasizes the comprehension of governance based on participation and partnerships within the framework of “global partnership” for long term sustainability. The project, which was carried out under the coordination of the Association of International Local Administrations, East Mediterranean, and Middle East Regional Organization (IULA-EMME), residing in Turkey, and with the support of UNDP, initially covered only 9 cities. Upon the successful results obtained at the end of the first year, it was published in the Official Gazette that the number of cities increased to 23 with the revision of the

project. Today, the project is carried out as a serious programme with the participation of 48 local governments, 9 of which are Metropolitan and 3 of which are Special Provincial Administrations (Arar, 2021). Turkey Local Agenda 21 Program has been an initiative that has attracted wide attention in various platforms in terms of the implementation of international commitments in solving youth problems. Youth work of the programme continued under the facilitation of Habitat from 1997 until the programme ended in 2011.

Association of Habitat

Tourism development in 3 provinces (Erzurum, Kars and Ardahan) in Turkey through which the Trans-Anatolian Natural Gas Pipeline (TANAP) passes, were discussed under the title of the Local Development Program within the scope of the Habitat Socio-Economic Development Program (February 2017 and February 2019) which was aimed supporting social and economic development in approximately 90 villages and towns. With the cooperation of Habitat Association and Kusadasi Municipality, Kampinova project (2020) has been implemented with the motto of "Learn, Have Fun, Renew". Training, workshops, accommodation, tents, sports, resting and joint working areas are planned. Kampinova aims to offer a different experience area to campers, remote workers, students, entrepreneurs, and a wide audience who want to organize events. It is also a frequent meeting point for “digital nomads” who are constantly on the go, who work independently of time and place in different parts of the world, who need more computers, mobile access, and a good internet infrastructure (Kampinova project,2020).

4.21.2.4 Relevant research and educational bodies

There are many studies on sustainable tourism in many different disciplines in Turkish researchers. Between the years of 1960 – 2021 on The Turkish Academic Network and Information Centre (ULAKBIM) TR index (2021), 336 studies and 7 projects in 44 different subject areas (tourism, geography, environment, history, etc.) are found (TR Index, 2021). TR index developed by TUBITAK (The Scientific and Technological Research Council of Turkey) ULAKBIM is a bibliographic/full text database containing articles in the fields of science and social sciences. They can be also found via Web of Science, Dergi Park[35] and other online resources. Also, many panels, seminars, congress, projects etc. on sustainable tourism are held on in Turkish universities.

An NGO and 25 Turkish universities are members of the Sustainable Development Solutions Network (SDSN), of which Bogazici University is the National SDSN host (Sustainable Development Solutions Network, 2021). Ozyegin University has established its own “Sustainability Platform” to produce and disseminate information on sustainability, raise awareness, and contribute to a multi-disciplinary and transdisciplinary environment. Özyeğin University started collaboration with the Turkish Industry and Business Association (TÜSIAD) in 2015 for institutional representation. As a result of this collaboration, the Turkish Industry and Business Association (TÜSİAD) and Ozyegin University (OzU) established the TÜSİAD – Ozyegin University Sustainable Development Forum (SDF) in 2017. The TÜSİAD-OzU SDF aims to introduce new approaches and methods to propel sustainable economic development and smart industrialization while minimizing their adverse effects on society and

[35] TÜBİTAK ULAKBİM provides academic journals published in Turkey with online hosting services and an editorial workflow management system for via DergiPark platform. DergiPark supports national academic journals to gain presence in accordance with international standards and increase their visibility.

environment. Kadir Has University has a Centre for Energy and Sustainable Development (CESD) which aims to conduct inter-disciplinary education and research activities at the local, regional, and global level on energy issues relevant to Turkey and its environs, and to share the information, commentary and analyses that are the outcome of these activities with the national and international public and thus to contribute to sustainable development. Istanbul Bilgi University has a research centre for the Environment, Energy and Sustainability which has an aim to contribute to environmental studies from a perspective that considers all aspects of environmental problems including energy and sustainability. The centre intends to serve as a bridge between all stakeholders including universities, NGOs, public institutions, and the private sector. In national level, universities are directed to coordinate green campus practices. According to UI GreenMetric World University Ranking which is a world university ranking - an initiative of Universitas Indonesia (UI) in 2010- to measure campus sustainability efforts, 26 Turkish universities are placed in 500 in all over the world.

4.21.2.5 Individual tourism business and destinations of particular relevance

Cittaslow Cities in Turkey

The Cittaslow movement has set out with the goal of being a realistic alternative to cities where people can communicate with each other, socialize, are self-sufficient, sustainable, protect their handicrafts, nature, traditions, and customs, but also do not have infrastructure problems, use renewable energy sources and benefit from the convenience of technology. Cittaslow Turkey Office carries out the application process to the International Cittaslow Network (Cittaslow, 2021). Cities that have a population of less than 50,000 and comply with the Cittaslow philosophy of the city administration and meet 72 criterias can apply to the Network. Various projects are carried out in 18 cities certified destination as Cittaslow in Turkey. They alphabetically are Ahlat, Akyaka, Egirdir, Gokceada, Gerze, Goynuk, Gudul, Halfeti, Koycegiz, Mudurnu, Persembe, Savsat, Seferihisar, Tarakli, Uzundere, Vize, Yalvac and Yenipazar.

***Barut Hotels*, Antalya** – Sustainability Report was prepared, and sustainable tourism is defined as "meeting the needs of our guests and the people of the region by thinking about future generations, protecting natural resources and wildlife, saving energy and water and increasing the quality of life constitute the basis of our sustainability activities". In the report, environmental issues such as the Waste Management System implemented by Akra Hotels, energy and water consumption, and the protection of animals around the hotel are discussed in detail.

***IP Hotels*, Muğla** – Social and ecological projects have been running according to its aim that "to protect natural resources, contribute to increasing environmental awareness, protect nature, support local companies, take part in social responsibility projects and increase sustainable tourism by protecting environmental quality."

***Six Senses*, Muğla** – The sustainability topic is placed on their website. As their commitment for wellness and sustainability, they continually develop new initiatives to maximize the health of guests and ecosystems. In this scope a few projects have been run in the hotel such as organic farming, local bazaar.

4.21.3 Activities and instruments for the development of sustainable tourism

4.21.3.1 Sustainable Tourism Initiatives, Projects, or Campaigns

The first application that stands out among sustainable tourism projects in Turkey is the "future is in tourism" project. The Future is in Tourism Sustainable Tourism Support Fund was implemented with the aim of making tourism an alternative sustainable development tool in Turkey, creating local models by encouraging entrepreneurship, and contributing to tourism by bringing together the public, private sector, universities, and civil society. The fund is managed in partnership with the Ministry of Culture and Tourism, United Nations Development Program (UNDP) and Anadolu Efes (A business that produces beer). Within the scope of the fund, in addition to funding support, implementation support such as training, planning, technical support, communication and consultancy is provided to three projects each year, ensuring that the projects are feasible and sustainable. As of 2021, the Future is in Tourism touched the lives of 200,000 people with a total of 19 projects. So far, they collaborated with more than 600 NGOs and 25 Universities. It provided employment opportunities for approximately 500 women. A selection of supported projects is summarized below. Further information can be found at the Gelecek Turizmde (2021).

- Doğu Anadolu Turizm Geliştirme Projesi (East Anatolia Tourism Development Project)
- Gel Bir Gün Misili Ol (Let's be a Misian)
- İpekyolu Misafir Evi (Ipekyolu Guesthouse)
- Seferihisar'ın Geleneksel Mutfağı (Traditional Seferihisar Cuisine)
- Dünyanın En Eski Tapınağı Göbeklitepe'de Taş İşçiliği (Stonemasonry at Göbeklitepe, the World's Oldest Temple)

In addition to these projects, the "*Greening Hotels*" project, which continues in cooperation with the Turkish Hoteliers Association, Bureau Veritas, and the Sustainability Academy aims to increase the awareness of the tourism sector on sustainability and the motivation of accommodation facilities to be environmentally friendly. These days the most important way to increase competitiveness in the tourism sector is to act with sustainable tourism principles. By making significant contributions to the development of sustainable tourism, the Greening Hotels Project also increases the number of environmentally sensitive consumers and encourages facilities to be greener.

"My Heritage Turkey" and "White Star" campaigns can be given as examples to the current campaigns carried out within the scope of sustainable tourism at the national level. Jolly, one of Turkey's leading tourism companies, aims to raise awareness in the field of sustainable tourism with the "*My Heritage Turkey*" campaign in May 2021, which has been created in cooperation with the United Nations Development Program (UNDP) Turkey. In addition, the campaign aims to develop sustainable tourism in Turkey, to minimize the negative effects of tourism on society and the environment, to increase the contribution of tourism to the local economy, to the protection of natural and cultural heritage, and to improve the quality of life of hosts and visitors. Turkish Hoteliers Federation (TÜROFED) has been running the "*White Star*" campaign for sustainable tourism since 2008. With the campaign aimed at raising the awareness of investors, operators, personnel, and guests staying at the facilities in the tourism sector, investments are made to save energy and water in hotels.

4.21.3.2 Marketing and information services supporting sustainability in tourism

With the development of the concept of sustainability, businesses have realized the importance of the environment issue. Therefore, the marketing managers of the enterprises have started to include environmental elements in their activities. These developments have created a new understanding of marketing that unites under the name of sustainable marketing and green marketing. Businesses have developed new marketing strategies to survive in an intense competitive environment and to meet the needs and expectations of consumers. Since the 2000s, the tourism sector, which is intertwined with the environment, especially in coastal areas, has started to offer sustainable-oriented services to the consumer by developing environmentally friendly marketing activities. It focuses on environmentally friendly practices in accommodation establishments, waste reduction, energy efficiency, protection of water resources and air quality. Businesses market themselves with sustainable labels to indicate these practices to the consumer. Application and certificate programmes such as "blue flag", "white star", "eco-friendly", "nature-friendly", "green key" can be given as examples of these labels (see 20.1.3.3).

Tour operators have some practices for sustainable marketing. For example, TUI tour operator who wants to establish a wind park near İzmir Bergama (a tourism destination) offers its customers the "Green Catalogue" application. Thanks to the ruler in the catalogue, customers can see how much damage a product has caused to the environment.

Another marketing strategy used in the country is product diversification. The types of touristic products in the country may vary depending on the infrastructure, superstructure opportunities and complementary services and natural, cultural, and social resources of the regions. According to Specialty Travel, which conducts research on the diversity of touristic products in Turkey, 85 different tourism products can be easily offered to tourists. For example, accommodation establishments in the coastal areas also offer services for congresses, business meetings or sports clubs in addition to the sea-sand-sun trio.

The current marketing activity carried out with the public administration is the "Mesopotamia" regional promotion project (GAP Regional Development Administration, 2021). The promotion programme of the "Mesopotamia" brand, which was created to promote the tourism potential of the Southeastern Anatolia Region (GAP) to the whole world, hosted by Şanlıurfa province, was introduced with the programme attended by the Ministry of Culture and Tourism, Ministry of Industry and Technology. With the GAP Region tourism-oriented promotion and branding project, it is aimed to make a sustainable tourism destination by branding all provinces with a holistic approach. The promotional project will be implemented in cooperation with the GAP Regional Development Administration, Dicle Development Agency, Karacadag Development Agency, and Silk Road Development Agency.

In addition, many touristic regions in the country such as Cappadocia, Lycia, Caria, Thrace, Olba are known with their historical geographical names and are marketed as tourism destinations. Because these names are the common property of humanity and civilization, not of any nation, state or language. Therefore, they are very well known.

There are many handbooks as a source of information on sustainable tourism issues. Some of these publications are: “Kuntay (2004) Sustainable Tourism Planning", "Ahipasaoglu (2006) Sustainable

Rural Tourism", "Kozak (2013) Sustainable Tourism Concepts-Applications", "Bahar et al. (2016) Sustainable Tourism with Different Dimensions" ", "Ceken (2016) Sustainable Tourism Basic Concepts and Principles", "Kocak (2016) Sustainable Tourism Management".

The main websites and portals that contain topics related to sustainability are as follows. They comprise the following websites:

- Foundation for the Protection and Promotion of Environmental and Cultural Values website (https://www.cekulvakfi.org.tr)
- Civil Society Development Centre website (https://www.stgm.org.tr)
- website that offers sectoral news on sustainability (https://www.turizmguncel.com/)
- projects supported by the Ministry of Culture and Tourism, United Nations Development Program (UNDP) and Anadolu Efes (https://www.gelecekturizmde.com/)
- articles on sustainable ideas, business opportunities, news, and activities, (http://cevreciyiz.com/)
- current news, articles, interviews and projects on sustainable architectural approaches, problems, settlements, urban problems (https://www.ekoyapidergisi.org)
- Ecotourism and Sustainable Tourism Association projects (http://www.ekoturizmdernegi.org)
- articles on sustainable energy issues (https://www.enerjigunlugu.net/)
- Turkey's first green guide and sustainable living platform (https://www.yesilist.com/)
- official website of Sustainability Academy(https://surdurulebilirlik.com.tr/). It is a non-profit, leading sustainability platform that works to be effective in shaping a better future in the business world and to create change and transformation in this way

4.21.3.3 Tourism Sustainability Certification Systems and Awards

The eco-labeling and certification movement, which started in the early 1990s in Turkey, has increased thanks to the positive attitudes of the consumers and employees, and awareness raising studies on the subject continue. National certificate programmes, eco-labeling and awards are given below:

Green Star: The project, which is a Ministry of Culture and Tourism Project and financed by the European Union and the Republic of Turkey, is one of the country's important rating programmes. The certificate programme, which entered into force after being published in the Official Gazette dated 22.09.2008 and numbered 27005, is given within the scope of the Communiqué (Communiqué No: 2008/3) on Granting Environmentally Friendly Accommodation Facility Certificate to Accommodation Facilities with Tourism Management Certificate." (Ministry of Culture and Tourism, 2021a). Green Star is a national label given to accommodation facilities that support environmentally friendly and sustainable tourism since 2008. It is a movement initiated to embrace the importance of energy efficiency and resource management in facilities, to support sustainable competition and to raise awareness of users on this issue.

Bicycle Friendly Accommodation Certificate: To promote bicycle tourism within the scope of sustainable tourism, "Communiqué on Granting Bicycle Friendly Accommodation Facility Certificate to Accommodation Facilities with Tourism Management Certificate" was published in the Official

Gazette (Turkey Tourism Promotion and Development Agency, 2021b). August 2020 dated and numbered 31224 was published and entered into force. According to this, if the accommodation facilities provide secure parking for bikes, have a bike wash and repair area, employ staff knowledgeable about routes in the area, offer cyclist-specific nutrition menus, 24-hour laundry facilities for cyclists, and basic maintenance/repair tools if he/she fulfills such conditions, they will be entitled to receive the certificate.

Greening Hotels Certificate: The Greening Hotels project, which started in 2009 in cooperation with TUROB, Bureau Veritas and Sustainability Academy, continues today; it aims to increase the awareness of the tourism sector on sustainability and the motivation of accommodation facilities to be sensitive to the environment. With the awareness that the most important way to increase competitiveness in the tourism sector today is the tourism sector to act with sustainable tourism principles; Making significant contributions to the development of sustainable tourism, the Greening Hotels Project also increases the number of environmentally sensitive consumers and encourages facilities to be greener.

Safe Tourism Certificate Program: It is a programme prepared under the guidance of international standards, under the leadership of the Ministry of Culture and Tourism, with the contributions of the Ministries of Health, Transport, Interior and Foreign Affairs and in cooperation with all sector stakeholders. It is aimed to minimize the losses in the tourism sector after the COVID-19 pandemic, and to re-establish the trust of domestic and foreign tourists in the sector. In addition, the certificate includes the procedures and principles for the work to be done to meet the high hygiene and safety expectations, the planning of training programmes for the employees in the workplace, and the prevention of the transmission of the COVID-19 virus. Accommodation businesses can get a "Safe Tourism Certificate" by being inspected every month by internationally authorized Certification institutions (Turkey Tourism Promotion and Development Agency, 2021a).

Sustainable Business Awards: This initiative is run by the Sustainability Academy. The purpose of the Sustainable Business Awards is to highlight the projects that have made significant impacts by proactively addressing and managing the economic, environmental, and social impacts of institutions and to share them with large audiences; to encourage change and accelerate the transition to sustainable business models by enabling these projects to be role models. To encourage this change, they have identified 14 main categories; they call on the business world to be a role model with its innovative and visionary approaches (Sustainability Academy, 2021).

The Blue Flag Label: It is one of the world's most recognized volunteer awards for beaches, marinas, and sustainable boat tourism operators. To qualify for the Blue Flag, a stringent set of environmental, education, safety and accessibility criteria must be met and maintained. The Blue Flag was first applied internationally in 1985 in France, in 1987 in the European Union, in 1993 in our country and in 2000 in countries outside the European continent. Today, it is applied in 49 countries around the world, 30 of which are in Europe. The Blue Flag Award Program is run by the independent non-governmental organization “Foundation for Environmental Education-FEE” and is represented by similar organizations in each member country. FEE programmes can only be run by non-governmental organizations. The only authorized institution responsible for executing the Blue Flag Program in Turkey is the Turkish Environmental Education Foundation.

Green Building Certificate: The concept of Green Building sustainability has emerged with the focus on buildings in the construction sector. “Green building” consists of sustainable (less harmful to the environment) building materials, water and energy efficiency must be high in these buildings. Green Buildings is a sustainability project and different certification bodies have established standards in this field in the international arena. There are hotels that use this certificate in the tourism sector in Turkey. In addition, Turkey ranks 8th in the world in terms of number of Green Buildings and total square meters. SEMTRIO company carries out the certification consultancy in Turkey.

The Travelife System: It is managed by ECEAT-Projects, a Netherlands-based non-profit organization. This system offers online training and practical tools for sustainability planning, management, and reporting. The training and tools are suitable for companies of all sizes and cover all management areas of travel businesses, including office work, supply chain, destinations, and customers. Travel company can gain “Travelife Partner” or “Travelife Certified” status if it complies with Travelife standards for tour operators and travel agents (ECEAT-Projects, 2021). Travelife management requirements comply with ISO 14001 and EMAS III standards. Performance requirements cover the entire ISO 26000 and OECD Corporate Social Responsibility guidelines, including working conditions, human rights, environment, biodiversity, and fair business practices. Travelife works closely with industry to promote and disseminate the programme. Currently, in Turkey more than 15 national travel organizations promote Travelife to their members.

4.21.3.4 Capacity Building for Sustainable Tourism

The tools offered for the capacity development of businesses and destinations for sustainable tourism in Turkey are generally under state control. These tools consist of seminars, trainings, and activity programmes within the scope of projects for NGOs. These tools are summarized below.

Abdullah Sevimcok Civil Society and Innovation Centres (ASSİM) affiliated to Antalya-Muratpasa Municipality organize online programmes, trainings and seminars for entrepreneurs and non-governmental organizations during the COVID-19 epidemic process. In addition, a coaching programme was held in cooperation with the Association for Coaching Antalya Coordinator for the project groups formed after the capacity building trainings for non-governmental organizations in ASSİM in March.

Within the scope of the Local NGOs Grant Program, capacity building trainings are provided for NGOs in the Project of Strengthening Local Cooperation in the Tourism Sector, implemented by the Samsun Tourism Association. The South Aegean Development Agency's 2021 technical support programme aims to support the efforts of local actors in the region, which encountered difficulties in the preparation and implementation stages due to the lack of institutional capacity.

Competitive Sectors Program (RSP) is an umbrella programme that incorporates Operational Programs, which are designed to increase the competitiveness of enterprises in the domestic and foreign markets within the scope of the European Union - Turkey financial cooperation and implemented in 7-year periods. The RSP, implemented by the Ministry of Industry and Technology, aims to increase productivity, accelerate industrialization, and develop a competitive production structure for export. Capacity building, tourism, business development centres and green projects programmes carried out within this programme also include sustainable tourism issues.

Capacity Building in the Field of Sustainable Community Based Tourism Project aims to develop national and local capacities for the planning and implementation of sustainable community-based tourism in Turkey. This initiative, which will be implemented nationally by the Ministry of Culture and Tourism, will also provide input for the Turkey 2023 Tourism Strategy by focusing on various tourism activities and highlighting alternative tourism initiatives.

4.21.3.5 Financial Support for SMEs in regard to sustainable tourism activities

Funding opportunities for SME are created to fund a specific project, initiative or investment and require a certain level of compliance, reporting and enforcement by the grantor. Government agencies, non-governmental organizations, banks, development agencies all offer funding opportunities in Turkey.

There are many grant fund options for sustainable tourism projects in the “Future is in Tourism” programme. NGOs do not have their own funds, but they can successfully access donor and grant funding programmes and projects that include sustainable practices, negotiate with governments to pursue policies that support sustainable projects, and/or create creative funding tools. NGOs, approximately one third of which are in Ankara, Istanbul, and Izmir cities in Turkey, carry out numerous research studies and projects on nature conservation, biodiversity, forest, soil erosion, seas and coasts, and sustainable tourism.

The bank that has the most important share in sustainable funding in the country is the Industrial Development Bank of Turkey (TSKB). It is a development bank established in 1950 with the support of the World Bank and the Central Bank of Turkey. TSKB's investment loan packages include hotel investments, facility modernization, equipment investment, and service systems. Garanti Bank, a local bank, has implemented a financial intermediary to support women entrepreneurs. Other important fund counting banks are Development Investment Bank and Turk Eximbank. KOSGEB is the Republic of Turkey's small and medium-sized enterprises development and support organization. It offers grant and loan options in every sector.

Development agencies play a critical role in mobilizing the support and funding of regional development projects. At this point, development agencies aim to establish cooperation between private and public sectors and non-governmental organizations with the aim of mobilizing regional resources and institutionalizing the understanding of regional development.

4.21.4 Summary and conclusion on national situation

4.21.4.1 Ambitions and core achievements regarding sustainable tourism and the role of SMEs in it

SMEs in Turkey play an effective role in terms of their role in reducing unemployment and creating new employment areas, their positive contributions to ensuring and maintaining balanced economic and social development, and their flexible production structure that can quickly adapt to changes in market conditions. Considering the sectoral distribution of SMEs, the largest share is constituted by enterprises in the service sector with 85%. The largest share in the service sector is the trade sector (wholesale and retail sales), followed by the transportation-communication and hotel and restaurants sectors. The basic document defining the SME policy in the country is the SME Strategy

and Action Plan (KSEP). The main reason for preparing the KSEP is to provide coordination at the national level in the implementation of policies related to SMEs. The main institutions involved in the creation and implementation of SME policy in Turkey, especially in the tourism sector, are the Ministry of Development, the Ministry of Economy, the Ministry of Customs and Trade, the Ministry of Finance, the Ministry of EU Affairs, Small and Medium Enterprises Development and Support Administration, Turkish Standards Institute, and Development Agencies.

The strategic objectives regarding the role of SMEs in tourism are determined in the KSEP as follows:

- Increasing the competitiveness of SMEs and ensuring their growth
- Increasing the internationalization level of SMEs by increasing their export capacitie
- Observing SMEs in the Improvement of the Business and Investment Environment
- Developing the R&D and innovation capacities of SMEs as well as facilitating SMEs' access to finance

4.21.4.2 Challenges for the development of sustainable tourism and for SMEs

Turkey is one of the luckiest tourism destinations in the world with its natural, cultural, and historical features. The tourism industry has been one of the most important forces behind the economic development of countries with its contribution to employment and the support it provides for the international balance of payments. As a result of the positive effects of tourism on the economy, tourism has gained importance in Turkey since the 1980s.

SMEs and entrepreneurs are integral parts of the country's economy and economic life. However, for both SMEs and entrepreneurs to continue their existence, it has become not only an economic necessity, but also a "social" and "environmental" obligation to produce products and services that society needs, considering the future from today. Sustainable entrepreneurship has become essential for a sustainable life quality and sustainable societies. The main challenges faced by SMEs in the development of sustainable tourism in the country are as follows:

- High energy costs
- Difficulties in accessing finance
- Inability to meet the professional manager needs they need in business management (in family business structures)
- Not being institutionalized
- Having difficulties in finding a qualified workforce and bearing their costs
- Deficiencies in promotion and marketing
- Inability to solve the problems arising from the family business structure
- The lack of awareness and capacity to create a brand
- Limited opportunities to do business and trade in the international arena
- Not benefiting from scale economies
- Inadequacy in following public tenders and submitting bids to these tenders
- Not having enough awareness about energy efficiency practices
- Not being sufficiently aware of capital market instruments
- Difficulty in collection of receivables
- Not giving sufficient importance to vocational and technical education

- Loss of labour and time due to documents with similar content received by different institutions
- Employment and tax burdens creating a competitive disadvantage in foreign markets
- Lack of coordination between institutions that produce and implement policies for SMEs
- Not evaluating support programmes for SMEs
- The negative effects of unfair competition created by unregistered businesses on SMEs
- Lack of cooperation between Public-Universities and SMEs
- The competitive disadvantage of shopping malls, store chains, large companies, and global companies towards SMEs
- Insufficient female employment

4.21.4.3 Prospects and challenges with regard to the (post)-COVID-19 situation

After every crisis, the importance of sustainability is remembered, and new regulations start being used. With the COVID-19, environment take a rest, nature come alive and economic and social issues come into prominence. Virtual touristic facilities are developed more. Due to the country's desire to reduce their risk of exposure to COVID-19, tourists will have to obtain insurance, pre-booking, testing and finally mandatory documentation of vaccination procedures before their trip. Of course, this will bring extra costs to the budget of tourists. In most destinations, tourists will want to continue practices such as health screening, quarantine and testing, social distancing seating arrangements, contactless check-ins, and transactions at airports. After 2021, situations such as quarantines and reduction of transportation capacities, especially in high-risk areas, will continue to be on the agenda.

In the report of the United Nations World Tourism Organization, which deals with the effects of the COVID-19 epidemic on tourism, the number of international tourists decreased by 22% in the first quarter of 2020, and the decrease in March, when most of this loss occurred, was 57% worldwide and 68% in Turkey (UNWTO, 2021). Providing safe travel and accommodation opportunities to overcome the crisis environment and restart tourism activities is important for the sustainability of tourism. To eliminate the effects of the COVID 19 epidemic on tourism, some measures have been taken and initiatives have been taken in the country. One of them is the "Safe Tourism Certification Program", which was developed under the leadership of the Ministry of Culture and Tourism and with the contributions of the Ministries of Health, Transport, Interior and Foreign Affairs. Accommodation and food and beverage establishments that want to obtain a certificate are inspected within the framework of hygiene and health criteria by accreditation companies authorized by the ministry, reports are prepared, and inspectors are sent to the establishments regularly to determine whether they provide service in accordance with the criteria. The establishments that have received the certificate are announced on the website of the Ministry of Culture and Tourism.

In the circulars of "Controlled Normalization Process in Accommodation Facilities" and "Controlled Normalization Process in Food and Beverage Facilities" published by the Ministry of Culture and Tourism, a series of precautionary measures have been announced in order to safely restart travel and tourism activities (Ministry of Culture and Tourism, 2021b). A series of applications have been presented for the epidemic situation in small and medium-sized tourism enterprises in Turkey. With the short time working allowance, the decrease in employment is prevented. Dismissals are stopped

for 3 months, and those who do not comply are penalized. Some credit, tax and invoice debts are postponed to future dates. Small, medium, and large enterprises are facilitated in the allocation and payment of loans in proportion to their capacities. Grants are given to those in need in a certain amount of cash. The annual fee for travel agencies was abolished in the year 2020. In all businesses in the tourism sector, hygiene and distance rules are started to be implemented and it is tried to protect employees and tourists. Measures against the epidemic are being increased with rules such as contactless payment, one and a half meters, disposable products, the abolition of the open buffet and the prevention of mask less travel in transportation vehicles.

During the COVID-19 pandemic, by applying Safe Tourism Certificate (STC) in tourism bodies, both tourist health and personnel health were taken under protection and the economy was maintained at the same time. STC is a good practice for all countries and supposed its accreditation will use in everywhere for hygiene and health to under control.

Due to climate changes, the effects of natural disasters such as tropical and winter storms, fires and monsoon rains will continue to be felt in 2021. It is thought that there will be a shortage of emergency personnel in many countries due to the COVID-19 infection.

In October 2020, the IMF stated that the global economy would shrink by about 4.4% due to COVID-19. The effects of this recession will be felt in 2021, even though vaccination has begun. Businesses closed due to restrictions and the disrupted economic system will continue to affect people's lives deeply.

Travel restrictions that started in 2020 introduced the idea of a stay at home. Even when some restrictions were lifted, people generally only traveled to places close to their homes.

Mobile applications are gaining more and more importance in the management of the services that hoteliers provide to their customers, controlling many elements of the guest cycle and experience. The trend towards digital and contactless services took off in 2020 with the pandemic. Services that traditionally required face-to-face customer service began to be revise with the widespread use of technology-centric options such as mobile check-ins, contactless payment methods, voice control and biometrics.

The data will provide information on past purchasing habits, allowing hotels to tailor their offers and promotions and automatically offer services like previous stays.

With the pandemic, the understanding of minimalism has been revived. Travelers are less and less seeking displays of wealth, choosing instead to spend wisely, purposefully and have a positive impact on the world.

New job profiles have emerged, especially after increasing complexity in the hospitality industry. Parallel to this, the need for quantitative competencies (forecasting, budgeting, etc.) has also increased.

People who stayed at home during the COVID period witnessed the renewal of nature. This witnessing will bring with it being more sensitive about the environment. Moreover, this trend will be reflected in tourism consumption preferences. Therefore, accommodation and catering businesses need to adopt simple but effective environmentally friendly practices. In addition, sales in the hunting and camping sector in the country increased by 35 percent.

Thanks to automation technologies, hotel operations in general are increasingly being shaped using management systems to monitor and optimize revenues, customer relationships, products, channels, and reputation. Mobile, cloud-based, and integrated solutions are particularly sought after. Integrated messaging, predictive analytics, customer profiling, and middleware aimed at connecting any disparate systems have grown in importance.

4.21.4.4 Recommendations for boosting Sustainable Tourism for SMEs

The sustainable tourism concept has entered our lives with the 1990s and is an approach that helps us understand the importance of environmental and local community awareness and the desire to maximize the benefits of Tourism. The protection of existing natural, cultural, historical resources and basic ecological processes are required for a sustainable development. There are efficient regulations, policies, and practices on the level of national politics. However, they must be embraced by all regional bodies all over the country. Various project calls and funds are given by national and international institutions. SMEs can benefit of related projects by having training and cooperating with local people to develop sustainable entrepreneurship, which comes with responsibilities towards the environment and nature. The general process and activities of sustainable entrepreneurship are defined as "recognition, development and exploitation of opportunities". So, it is needed to work collaboratively with all actors on the development of sustainable tourism in one's own region.

One of Local Agenda 21's projects - GEN (Global Entrepreneurship Network) Turkey strengthens the entrepreneurship ecosystem of Turkey by carrying out activities for the development and support of entrepreneurs in Turkey and contributing to the design processes of entrepreneurship-related policies with its global knowledge. Digitalism in tourism is a trend topic, especially in post covid times, so studies and investments should be increased by various actors such as universities, SMEs and NGOs.

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5 The post-COVID-19 Future of Sustainable Tourism in Europe

Martin Balaš

After decades of unprecedented growth despite several global crises, tourism has come to an almost complete standstill in 2020 during the COVID-19 pandemic. Global travel restrictions, stay-at-home orders and travel bans for about 90% of the world population caused a drop of international arrivals by 74% (Gössling et al., 2020) and created a severe disruption of the tourism sector with economic impacts that have never been experienced before. Despite financial supports by national governments with liquidity and funding measures, the investment gap of European tourism is estimated to be 161 billion EUR, being the most affected industry of all economic ecosystems in Europe (European Commission, 2020).

The initial shock has been followed by the disillusionment that a rapid recovery to the pre-pandemic business logic is less realistic, as the containment measures of the virus such as restricted mobility and social distancing will continuously affect tourism activities. In addition, the pandemic revealed that tourism also served as an indirect supporter of pandemics and was therefore brought to higher political attention, also when combating pandemics in general in the mid and long-term (Hall et al., 2020).

The severe impacts of the COVID-19 crisis led to a strong critical reflection of the overall tourism model and its potential perspectives in post-COVID times. Interestingly, this has been initiated by international institutions such as UNWTO, WTTC or the OECD and was followed by NPOs, scientific literature and new coalitions and partnerships. The following chapter provides a brief review on publications by these different stakeholder groups, focusing on the main implications for future tourism scenarios.

5.1 Reflections on post-COVID tourism

The COVID-19 pandemic marked such a deep and broad impact for tourism, that it also created a rare opportunity for reflection and critical discourses regarding a recalibration of future tourism strategies. This is being represented by the vast amount of publications in the first year of the pandemic. The tourism researcher and consultant Dr. Anna Spenceley lists in her weblog more than 1.400 resources until August 2021 linked to tourism and COVID-19, with the majority of them being individual opinions and think pieces (169 resources), policy and development responses (156 resources), market intelligence evaluations (110 resources) or publications about impacts of tourism on the environment and wildlife (108 resources). The variety of these contributions also represents the complexity of tourism as a cross-sectoral industry with many different interests and influencing-factors connected to it, that range from international intergovernmental bodies, NGOs, scientific contributions to new emerging initiatives and coalitions.

Responses by international organizations and intergovernmental bodies

The UNWTO as the representative supranational institution of global tourism continuously predicted an increase of international tourism for this decade, forecasting this growth as an opportunity for employment quality, poverty reduction and incentives for environmental conservation (UNWTO, 2017). The traditional idea of connecting tourism ‘success’ to growth in tourism numbers has been

questioned in the context of the financial global crisis (Hall, 2009) and was further relativized with the rising challenges of over tourism, climate change and now the COVID-19 pandemic (Gössling & Higham, 2020). A first critical publication on paradigm shifts of tourism by the UNWTO itself in 2016, concluded that disruptions such as the climate crisis act as triggers for a "21st century era of consequences and responsibility", questioning the limitless volume growth model. This critical reflection was mainly connected to the change of demand towards more aware travellers that value the planet and human relationships. These "cultural creatives" were perceived as a powerful medium through which the world could be "reinvented". With the COVID-19 crisis, the pause in economic activity provided such a moment of eye-opening and a glimpse of global tourism that moves from over-tourism to non-tourism within months (Lew et al., 2020).

The UNWTO published several guidelines, recommendations and assistance packages in 2020 for tourism recovery within and after the pandemic that strongly built on each other. Whereas publications in the first half of 2020 called for a quick return to a 'new normal', with traditional growth perspectives as key priorities that should be stronger linked to sustainability and resilience, the imperative changed in the second half of 2020 towards a stronger sustainability focus. Especially the publication **Vision for a Responsible Recovery of the Tourism Sector** by the UNWTO and the One Planet Sustainable Tourism Programme (2020e) called for a recovery which should be founded on sustainability, in order to build back better and to strengthen the resilience of the tourism sector. The presented six lines of action entirely focused on livelihood parameters, with tourism being a supporter for host communities. This strong focus on a sustainability shift of tourism was substantiated by further publications by the UNWTO such as **Recommendations for the Transition to a Green Travel and Tourism Economy** in 2021 that provided first examples of how a transition towards a green travel and tourism economy could be operationalized.

The UN published a similar report as a policy brief in August 2020, highlighting the dependencies between the tourism economy and environmental as well as cultural livelihoods and calling for a future to "transform the relationship of tourism with nature, climate and the economy". In particular, the publication urged the tourism industry to "advance efforts to build a new model that promotes partnerships, places host people at the centre of development, advances evidence-based policies and carbon neutral investment and operations".

A publication by the OECD in early 2021 with the title **Managing Tourism Development for Sustainable and Inclusive Recovery** directly criticized the "economically, socially and environmentally unbalanced" growth of tourism in recent years and demanded an "overarching objective to evolve, sometimes radically, current tourism business models". Despite this call of action, the OECD still forecasted a return to growth scenarios of tourism in the medium-term, which then should be moved to a "greener, more sustainable tourism development".

The World Travel Market London (WTM) created the **Manifesto for a Safer**, **Greener and Smarter Tourism** in November 2020, which summarizes statements of about 500 ministers and national leaders worldwide. Next to globally aligned travel restrictions, health protocols and a continued government support, the report pledges for a sustainable, resilient, seamless and inclusive tourism development. The interviewed leaders perceived the pandemic as a 'reset' with positive effects on sector sustainability and future priorities on decarbonization, destination stewardships and human rights in tourism.

The European Commission presented the report **Tourism and Transport in 2020 and Beyond** in May 2020 with a clear statement of putting sustainability at the core of all ambitions for tourism development in Europe. In March 2021, the European Parliament decided in a plenary sitting on establishing an EU strategy for sustainable tourism with ambitions to strengthen initiatives for a sustainable, responsible and smart tourism development.

The European Travel Commission (ETC) published the **Handbook on COVID-19 Recovery Strategies for National Tourism Organisations** in September 2020 with the aim to "provide NTOs with strategic recommendations to follow the path to rebuild both the tourism industry and travel confidence and ultimately support the creation of a new tourism ecosystem". In this report, the ETC pledged for a reset of national tourism strategies to put tourism in Europe on a more sustainable path to make "Europe the most sustainable destination in the world". This was followed by the guidebook **Sustainable Tourism Implementation: Framework and Toolkit** in February 2021, which aims to provide concrete support for National Tourism Organisations (NTOs) to integrate sustainability into national strategies and ensure that this goes beyond tokenism.

In conclusion, all mentioned publications called for a stronger alignment of tourism towards sustainability in the next years, with COVID-19 serving as a reset for changing overall perspectives of tourism development. The phrase "building back better" has become the main message within these publications, meaning that sustainability aspects should be integrated into all forms of support and be the core of new scenarios and business models, aiming at a more resilient tourism industry overall.

However, these statements are still to be perceived as pledges that lack of a specific operational underpinning or actual implementation in tourism policies. Presented case studies have mostly already been initiated before the pandemic or are rarely embedded in overall national tourism strategies or policies. As the UNWTO analysed in 2019, about half of the existing 73 national tourism policies worldwide presented detailed references of sustainability in their strategies and almost none made references to SDGs or concrete and guiding sustainability instruments (UNWTO, 2019). Hence, national tourism strategies need to be recalibrated first, before the pledges during COVID-19 lead to mid- and long-term sustainability measures. This aspect is being tackled by the recent ETC-Handbook, which was published in late 2020.

Table 14: Thematic focus of the analysed publications / contributions by official international tourism institutions in times of the COVID-19 pandemic (2020-2021)

Publication / Contribution	**Emphasis on…**					
	Economic recovery	Travel restrictions	Governance structures	Sustainability	Resilience	Other
UNWTO: Supporting jobs and economies through travel & tourism	x				x	
UNWTO: Priorities for	x	x		x		

Publication / Contribution	Emphasis on…					
tourism recovery						
UNWTO: COVID-19 tourism recovery technical assistance package	x		x		x	Marketing and promotion
UNWTO: One planet vision for a responsible recovery of the tourism sector			x	x	x	Public health, social inclusion
UNWTO: Recommendations for the transition to a green travel and tourism economy			x	x	x	
UN: Policy brief: COVID-19 and Transforming Tourism	x		x	x	x	Digitalization, social inclusion
OECD: Managing tourism development for sustainable and inclusive recovery			x	x	x	Measurement tools
EU: Tourism and transport in 2020 and beyond	x	x	x	x		
EU: Report on establishing an EU strategy for sustainable tourism		x	x	x		Demand development
ETC: Handbook on COVID-19 recovery strategies for national tourism organisations	x	x	x	x		Funding models, partnerships, demand development
ETC: Sustainable tourism implementation: Framework and Toolkit				x	x	
WTM London: Manifesto for a safer, greener and smarter		x	x	x	x	Health, mobility

Publication / Contribution	Emphasis on…
tourism	

Responses by non-governmental bodies

The demand for a realignment of tourism after the pandemic has also been expressed by several non-governmental bodies. One example is the **Future Of Tourism Coalition**, which was founded in 2020 by six international NGOs and has reached several hundreds of supporters. Its collaborative claim is to frame a new, more sustainable direction for tourism and shift the status quo. The Coalition has put forth 13 Guiding Principles that outline a vision for tourism's path forward and is calling on tourism agencies, travel companies, governments, investors, non-governmental organizations, and destination communities to commit to them. The principles focus on the support of tourism destinations as cultural and environmental livelihoods and include main principles of sustainable development. The signatories need to explain their efforts to contribute towards these principles.

A similar body which focuses on tourism and climate change is the **Tourism Declares Climate Emergency** initiative. This global community of 303 organizations, companies and professionals aims to cut global emissions in half by 2030. This platform also serves for sharing challenges, ideas and solutions and to develop tourism that is in balance with climate, restores biodiversity, and supports vulnerable people across the world. Declaratories need to develop a climate action plan, share their plan publicly and implement measures to cut their emissions.

The Tourism Research Information Network TRINET published a statement in April 2020 which called attention to the immense opportunity to redefine post COVID-19 travel and tourism to be based more on regenerative principles. Within this document, the researchers also stated that such a redefinition of tourism principles would require "new sets of values, new paradigms, and a dramatic shift from the over-tourism, over- consumption and excessive greed that defined much pre-COVID-19 tourism". The authors placed such a sustainability focus rather in the post crisis phase.

The **European Tourism Manifesto Alliance**, an alliance of more than 60 European public and private organizations, published the **Tourism Manifesto: Exit Strategy. Preparing to Restart Travel and Tourism** in February 2021, which called for the development of a concrete EU roadmap to restart travel and tourism. The manifesto focuses on a coordinated approach of tourism reopening without claiming for a sustainability focus. Hence, not every initiative directly links sustainability to post-COVID tourism strategies.

A national example of post-COVID tourism visions is the **Impulse4travel Manifesto**, which was developed by 30 tourism experts in coordination by the consultancy **Realizing Progress** and describes guiding principles for tourism in Germany until 2025. The main focus of this position paper is to perceive tourism as a facilitator for thriving future local livelihoods that has the capability to advance mega trends such as the socio-technical development, new work, digitalization and sustainability in rural and urban areas.

Declarations by tourism alliances forecast similar to official tourism bodies an increase in the relevance and urgency of sustainability topics in the next years. Statements that are initiated by

NGOs are expectedly more demanding regarding the necessity of a tourism transformation and recommend measures for businesses to act according to the demanded topics. Other declarations by industry representatives, are rather aiming for returning to the pre-COVID status quo. However, all presented outputs emphasise the necessity to coordinate travel restrictions and health requirements internationally so that international tourism can restart again and then is able to set up new strategies and policies.

Scientific contributions

A search of scientific articles in the international database **Web of Science** about COVID-19 and tourism, revealed a total number of 1563 publications until 19th August 2021. Most of the articles were either published in general tourism and hospitality journals (41%) or in journals with a particular focus on environment or sustainability (44%). Only a small share of 12% was published in journals with a management or economic focus. The research areas of publications, however, are mainly located in the field of Social Sciences (42%), followed by three main fields: Environmental Sciences (18%), Business Economics (17%) and Science Technology (13%). Hence, the scientific articles about tourism and COVID-19 mostly dealt with impacts on the population, the economy and the nexus of tourism and sustainability. The most important keywords aside from **COVID** / **Corona** and **Tourism** was **Sustainability** / **CSR** / **Responsible Tourism**, followed by **Crisis** and **Resilience**.

In conclusion, the COVID-19 crisis has started a fundamental discussion of tourism stakeholders worldwide from all disciplines about what 'desirable tourism' is and what it should not be anymore (Lew et al., 2020). Thus, the status quo of tourism is being generally challenged and new conditions for a shift towards a future-oriented tourism are critically evaluated. Recovery is being connected with terms like sustainability, digital transformations, innovations, stronger cooperation amongst tourism authorities and upmost resilient structures. Even so, the presented studies point out two different possible developments: on the one hand, 'building tourism back better' with an offer based on sustainability standards that meets a higher sensitivity and demand for sustainable tourism and a decreased interest in mass tourism, and on the other hand a return to the 'old normal' after the crisis is over.

Resilience seems to be the omnipresent postulate for most of the presented reflections, especially in connection to sustainable tourism. This might be plausible at first sight, as it promises a return to a 'back to normal' state during a time of external shock, which has shown how vulnerable the tourism industry can be. However, a systematic explanation of the concept of resilience is still lacking in these publications and the relationship towards sustainable tourism has hardly been closely evaluated. A generalisation of this issues, as it is mostly done in recent publications, is problematic. It creates a buzzword surrounding for a concept which has already been examined for several decades and might fuel expectations and promises that are not clearly in line with conceptual ideas of resilience. Thus, it is necessary to explain the concept first, before reflecting on the recent resilience debate as being a suitable model for moving towards a sustainable tourism in Europe.

5.2 Tourism Resilience as the new sustainability?

The concept of resilience may be introduced as a process between persistence and transformation. Originally coming from material sciences, the so-called 'engineering resilience' describes the capability of materials and structures to withstand physical exposures and to return or to recover towards the initial state. This characteristic of 'bouncing back' is seen as a type of risk minimization or as a strategy for a fast recovery after times of external shocks. Thus, a resilient object should be persistent, recover quickly and be capable of returning back to the original state. Several different research disciplines advanced this idea of "elasticity" with aspects of change, interactions and transformations of systems elements. Within the context of environmental sciences, Holling (1973) described resilience as the extent of a disturbance that can be absorbed before a system changes its structure. So, in times of stresses or crises, every system has an adaptive ability to absorb disturbance and to reorganise itself while undergoing change so as to retain the same function, structure, identity, and feedbacks (Walker et al., 2004). This perspective rather puts a focus on establishing vital surroundings and capacities that enable self-organized adaptive learning processes with the aim of achieving new balances and contexts. Such a dynamic conceptualisation of resilience especially applies to complex systems, where it is not usual to bounce back to a previous equilibrium because it is simply possible to shift between multiple stable states (Hall et al., 2018). The idea of dynamic and adaptive capacities of elements is often illustrated as an infinity sign, called the "adaptive cycle".

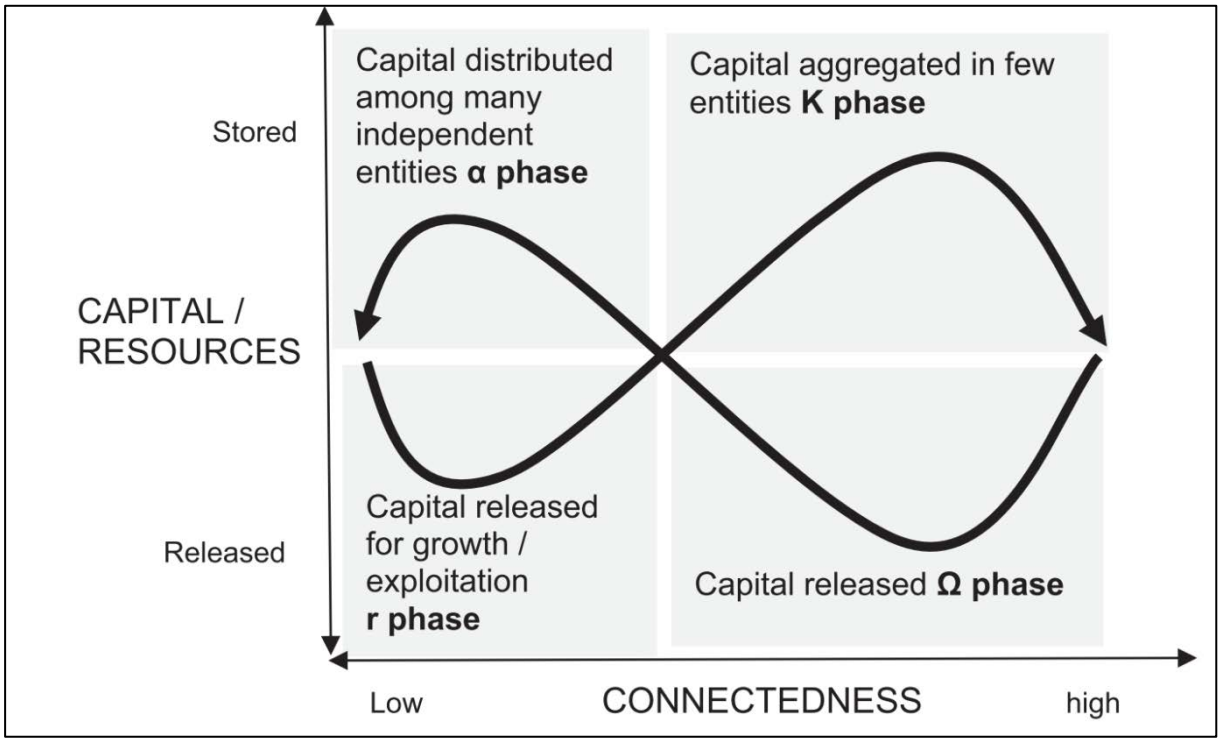

Figure 32: *Basic two-dimensional adaptive cycle of resilience (capital/resources and connectedness) with the four staged of system dynamics (Hall et al., 2018)*

The four stages of system dynamics in the adaptive cycle describe an advancement of the traditional Tourism Life Cycle Model by Butler (1980) and present three underpinning ideas: system variables are connected amongst each other, crises and disruptions can have potentials for effective

adaptation and change, and strong relationships increment innovative potentials. Taken as a whole, the adaptive cycle has two opposing modes: a development loop (or fore loop) and a release and reorganisation loop (or back loop). The fore loop is characterized by the accumulation of capital, by stability and conservation, a mode that is essential for system wellbeing to increase. The back loop is characterized by uncertainty, novelty and experimentation. The back loop is the time of greatest potential for the initiation of either destructive or creative changes in the system (Walker & Salt, 2006).

System dynamics are additionally influenced by several temporal and spatial scales that are also linked to each other: "What happens at one scale can influence or even drive what's happening at other scales" (ibid.). Cross-scale interactions are common in complex systems and describe the interdependence of different levels of a system. As long as the transfer from one level to another is maintained, the interactions within levels themselves can be transformed without the whole system losing its integrity or failing. The explanation of different system-level interactions is a typical notion of sustainability: To create, test and maintain adaptive capabilities and opportunities for the future (Holling et al., 2002). By understanding complex systems as adaptive cycles that are nested in a hierarchy across time and space, it is possible to generate novel combinations of system elements (f.e. innovations or experimental measures) that can be tested during longer periods without automatically triggering cascading instabilities of the whole, because of the stabilizing nature of the overall nested hierarchies. This innovative potential is highlighted within the concept of transformative resilience, which puts an emphasis on the reorientation phase of the adaptive cycle and tries to identify patterns that eliminate traditional path dependencies and create newly defined stabilities. The current discourse of transformative resilience mainly focuses on quantitative growth mechanisms and alternative economics that is in line with the planetary boundaries and the principles of sustainable development.

Tourism can be perceived as a complex system that continuously has to withstand external influences on different levels and that is embedded in a wider socio-economic and social-ecological environment. The capability of adaptation, learning and innovative thinking has been a main subject of modern destination management in the last decades (Fabry & Zeghni 2019), with resilience being a concept for a proactive management and planning of destinations, in order to increase the persistence and adaptability of tourism stakeholders in times of external disturbances. The focus on resilience as a stabilisation tool for disaster management and a framework for identifying internal and external effects on tourism is prevailing in tourism research (Hall, 2018). Little work has been carried out yet on conceptualising resilience as a long-term objective of transformation which has connections to sustainability (Espiner et al., 2017). However, there is a growing awareness that tourism destinations need novel strategies to cope with and that resilience offers – next to sustainability - another useful conceptual framework to develop new ways of responding to unexpected future challenges (Luthe & Wyss, 2014). This awareness increased rapidly in times of COVID-19 and calls of a more sustainable and resilient tourism are omnipresent, as discussed before.

The relationship between resilience and sustainability is not trivial and discussions around a clear alignment are still ongoing. However, there seems to be an emerging consensus that tourism entities can be resilient without being sustainable, but a sustainable development of tourism always should include elements of resilience (McCool & Khumalo, 2015; Espiner et al., 2017). Resilience is being

perceived as a prerequisite for sustainability in tourism (Prayag, 2020). As measures of resilience can enable tourism systems to persist over a longer period of time, resilience is seen as necessary for establishing sustainability in a tourism destination. If resilience is low, the sustainability of a tourism system is described as vulnerable. Therefore, sustainable development in tourism destinations can only be achieved if the tourism system is sufficiently resilient. Hence, there is a complementary relationship between sustainability and resilience, with the most sustainable tourism destinations also being those with high levels of resilience. Yet, resilience efforts that do not include sustainability principles, may also be a risk for a long-term tourism development. Take for example snow cannons in winter destinations: This might be an adaptation measure to changing climate conditions and make destinations more resilient, but this would conflict with ecological sustainability measures.

The greatest similarities between resilience and sustainability can be identified within the transformative perspectives: Both concepts strive for a balance between human and ecological systems, and both urge for the understanding that planetary boundaries should not be overstressed. Yet, (transformative) resilience and sustainability should not be misunderstood as being the same, because there are interrelated conditions between them. Recent studies on resilience and sustainable tourism therefore pledge for a stronger inclusion of resilience elements into practical cases of sustainable tourism developments, as it expands the general idea of sustainability. So, resilience cannot replace the guiding principles of sustainable tourism, but it certainly expands the sustainability debate by including new and additional important elements of long-term management.

In general, three main features complement sustainability with resilience perspectives (Röther, 2021; Scuttary & Corradini, 2018):

- **Critical technological infrastructure,** that (such as digital and transport elements) needs to be set, available and maintained in case of crises situations, and ecological systems need to be intact so that they withstand short-term crises,
- **Adaptive and reflexive capacities**, such as formal and informal network settings, destination governance structures and economic stability with the aim of strengthening social capital and allowing a coexistence of multifunctional systems,
- **Minimization of path dependencies**, by creating innovative, vital and agile regional surroundings, that are more persistent in destabilizing times.

These features are main perspectives of resilience that need further specifications, in order to include them into sustainability strategies and to make them tangible in terms of tourism management. Within the concept of regional resilience (Raith et al., 2017; Förster, 2019), some central elements are being highlighted for implementing resilience into general sustainability dimensions that can be applied to the tourism context as follows:

Economic dimension

Product modularity: A diversification of tourism products in terms of serving different target groups and combining different product functions (f.e. agritourism) may lead to reducing vulnerabilities and stabilizing economic performances of businesses.

Short feedbacks: By regionalizing supply chains / reducing leakages and at the same time setting up effective monitoring principles, it is possible to better steer unwanted developments and also to create a better awareness of possible hazards.

Innovations and Creativity: The urge for new developments is dependent on skills, learning capacities and the courage to try out new ideas. Therefore, a destination should support learning opportunities and create surroundings for experimenting new practices and approaches of tourism businesses, especially in terms of sustainability and future challenges.

Parallelism / Coopetition: Services and products with similar functional elements should not solely be perceived as competitive but do also reflect the multifunctional character of destinations, which again fosters innovation and regional vitality. Cooperation of businesses should be encouraged by destination management, so that synergies can be created that can increase the overall customer experiences.

Social dimension

Social capital: The creation of networks, the support of collaborative potentials between tourism stakeholders as well as the implementation of decent jobs within businesses is essential for creating harmonious, qualitative and seamless products and also for identifying synergies between stakeholders.

Progressive regional identity: The cultural identification of a destination is dependent on the emotional connection of the population towards their environment, their local livelihood and the community involvement. A strong regional identification creates surroundings of solidarity, a sense of responsibility and a willingness to act – it makes people to *belong* to a place. In regard of resilience, such an identification needs to be inclusive and part of a local culture that encourages an individual and local diversity, that is integrated in local democratic processes and that fosters creativity and innovations. The creation of such local "laboratories of future solutions" is also called "community resilience" (Bardsley & Bardsley, 2014).

Ecological dimension

Ecological responsibility: Every individual and corporate action is influencing the resilience of the overall destination. This certainly also includes impacts on the natural environment. Therefore, resilient thinking also focuses on the conservation of resources and the reduction of ecological impacts by human activities. Two main aspects are the call for individual responsibility though a low-resource lifestyle of each person and the equal access to public resources such as the right to access natural resources such as clean water and sanitation.

Climate protection and adaptation: Advocates of transformative resilience demand a stronger focus on processes (instead of outcomes) and on impacts (instead of outputs), in regard of fighting man-made climate change. This mainly includes the analysis of possible future scenarios by formulating adaptation and transformation strategies and testing, which new development paths can be taken, so that emissions are cut as fast as possible while simultaneously creating positive effects on social-ecological systems.

These main aspects of (regional) resilience may have clear similarities with sustainability criteria and one might argue that resilience is just a new academic "buzz word" that legitimizes prevailing

sustainability strategies or merely gives existing measures a modern zeitgeist. It is true that there needs to be a greater transparency in dealing with the term and a critical examination of the recommendations for action that derive from it (Hall, 2018). The rather additive integration of the term within the presented post-COVID strategies and recommendations justifies this critical stance. However, there is much more potential to the idea of resilience than declaring it as "old wine in new bottles". The following arguments support a further deeper engagement with resilience for future tourism planning:

Resilience-thinking as a bridging concept

By understanding resilience as a dynamic process, the focus shifts to management parameters that are intended to help strengthen system-immanent resources and capacities. In this way, an enhanced understanding of destination governance is established and a strengths-based approach in dealing with crises and change is stimulated. The concept of resilience offers a necessary interconnection of different fields of knowledge for current and future challenges. Different aspects of urban and regional planning, social or environmental sciences are considered within the concept of resilience and thus be applied transdisciplinary. In this sense, the concept of resilience can also build a bridge between systemic and normative approaches of sustainable tourism development. It is clear that resilience cannot replace the guiding principle of sustainable tourism, but it has the potential to expand the sustainability debate with new and important systemic perspectives.

Dealing with missing Knowledge and Change

Resilience takes into account different temporal and spatial perspectives in relation to risks and crises. Complexity and missing knowledge in times of crises are accepted. Instead of dealing with simplified causes and symptoms, the focus shifts towards the search for flexible and adaptive management options. New capabilities to manage change and mitigate interdependent risks become central elements for a long-term crisis management. Dealing with complex and not clearly foreseeable challenges can be well focused by resilience and support the concepts of sustainable development to better embrace change and respond appropriately to unexpected situations.

Positive Psychology and integration of new parameters

Resilience is understood not only as a strategy for restoring previous structures ("bouncebackability"), but as a means for the self-renewal of a destination in terms of its functions, structures, identity and relationships. In this context, characteristics such as diversity, modularity, redundancy and short feedbacks take on a greater significance, which tend to be considered more cryptically in the sustainability debate.

In conclusion, a transformative resilience of tourism requires the following general shifts of development (Raith et al., 2018):

- Moving away from the idea of a linear development, so that adaptations to external crises and shocks are being perceived as transformative in nature,
- Strengthened regional economies being a central objective in order to minimise ecological burdens and to increase the local quality of life,
- Enhancing social innovations, as they play a central role in the transition to a sustainable post-fossil civilisation.

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6 Summary and conclusions

Heike Dickhut

The European Tourism Going Green SME Report provides an overview of Europe-wide action on the state and development of sustainable tourism at different levels, with a particular focus on small and medium-sized enterprises (SMEs). It comprises information about the political framework for sustainable tourism at global and European level but the emphasis of the report is clearly put on the 21 national chapters that are describing and analyzing the current situation of sustainable tourism in general and of SMEs in particular in each country contributing to the report with a national chapter (see table 15).

Table 15: Overview of the HEI (Higher Education Institutes) Partners

Country	HEI Partner
Albania	University of Tirana
Austria	BOKU - University of Natural Resources and Life Sciences
Bulgaria	Sofia University St. Kliment Ohridski
Croatia	University of Rijeka
Cyprus	Cyprus University of Technology
Czech Republic	Palacký University, Olomouc
Denmark	University of Southern Denmark
France	Université de Paris 1 Panthéon Sorbonne
Finland	Individual sustainable tourism expert
Germany	Eberswalde University for Sustainable Development
Hungary	Budapest Metropolitan University
Italy	Individual sustainable tourism expert
Netherlands	Breda University of Applied Sciences (BUAS)
Poland	University of Information Technology and Management in Rzeszow
Portugal	Individual sustainable tourism expert
Romania	University Stefan cel Mare, Suceava
Russia	Russian State University for the Humanities, Moscow
Slovakia	Mateja Bela University
Spain	University of the Balearic Islands
Switzerland	Lucerne University of Applied Sciences and Arts
Turkey	Akdeniz University, Antalya

Source: Own compilation (2021)

These national reviews cover information regarding relevant stakeholders, policies and strategies as well as activities and instruments linked to sustainable tourism development at national level. Furthermore, they address core achievements as well as challenges and opportunities regarding the development of sustainable tourism, possibly taking into consideration the implications of the COVID-19 crisis.

With regard to the national chapters and the current situation on sustainable tourism in the respective countries the following conclusions can be drawn on selected issues.

National sustainable tourism policies and strategies

The reports show that sustainable tourism is considered within the national tourism policies in all countries surveyed, albeit to different extents and in different ways. In most of these countries, sustainable tourism issues are framed as part of a respective national policy document, predominately as part of a "National Tourism Strategy" (also referred to, for example, as "Strategy of Tourism Development", "National Tourism Development Masterplan", etc.) in which sustainable tourism issues are recognized and addressed in one way or another (e.g. Finland, Italy, Netherlands, Romania, Switzerland), in some cases even as priority areas (e.g. Austria) or determined as a strategic goal (e.g. Hungary). Only a few countries have elaborated a strategic national policy document explicitly dealing with sustainable tourism, such as the "Strategy for the Sustainable Development of Tourisms 2019 – 2023" in Albania or the "National Strategy for Sustainable Tourism Development in Bulgaria (2014 – 2030)". Also, Croatia, Denmark and Slovakia are currently in the process of developing a new strategy for sustainable tourism development.

Besides these strategic tourism documents, there are several other policy documents in the majority of the countries, which as well address sustainable tourism issues and therewith contribute to the political framework for sustainable tourism development. They include, for example, national strategies focusing on sustainable development based on the Agenda 2030 and the SDGs or other dedicated policies and guidelines dealing with climate change and adaptation, nature conservation and biodiversity protection, mobility, spatial development, and governing sustainable tourism activities in relation to these respective topics.

Activities and instruments for the development of sustainable tourism

The research shows that there is a broad spectrum of sustainable tourism activities carried out in the countries at different spatial level (national, regional or local). They range from projects and campaigns, information activities, and certification up to capacity building and financing opportunities for sustainable tourism. The topics are as diverse as the types of activities and instruments.

Sustainable tourism certification

As the ETGG project – as one core objective – strives to support SME sustainability implementation especially by boosting and possibly achieving sustainability certification for tourism SMEs, the findings concerning the certification schemes, which are present in these European countries, will be discussed here in more detail.

With regard to international sustainable tourism certification schemes for businesses, the certificates Green Key, Blue Flag, Travelife and Green Globe are the most common ones throughout all of the countries analyzed, whereas the Green Key and Blue Flag are mostly prevalent in terms of their numbers of the certified businesses. Travelife and Green Globe are also represented quite often but in comparatively lower numbers than the two other ones just mentioned (see table 16).

At European level the European Ecolabel for tourist accommodation services (hotels, campsites) is distributed in the majority of the countries listed, but only in a few of them on a larger scale, e.g.

France (182), Austria (64), Italy (56) and Spain (52). The two certificates Biohotels and Green Sign seem to be mostly popular in the German speaking countries Austria, Germany and Switzerland as well as in South Tyrol, the German speaking part of Italy, with a clear predominance of the Green Sign certificate in Germany.

Table 16: Overview of most common international certification schemes by country

Country	Green Key (Awarded Sites)	Blue Flag Certificate (Beaches, Marinas, Boats)	Travelife (Awarded companies)	Green Globe (Members)
Albania	X	X	0	X
Austria	7	X	0	6
Bulgaria	X	14	1	X
Croatia	10	79	2	1
Cyprus	31	69	X	X
Czech Republic	3	X	X	1
Denmark	193	184	8	X
Finland	198	1	1	X
France	681	525	7	32
Germany	39	136	4	21
Hungary	X	X	X	1
Italy	17	497	13	9
Netherlands	684	183	34	30
Poland	7	36	X	X
Portugal	144	399	1	2
Romania	X	5	X	1
Russia	26	35	2	1
Slovakia	X	X	X	X
Spain	X	712	1	3
Switzerland	X	X	0	20
Turkey	X	551	2	X
Total	**2040**	**3326**	**76**	**128**

Source: Own compilation (2022) with numbers based on (Green Key, 2021 / Blue Flag, 2021 / Travelife, 2021 and Green Globe, 2021)

Besides the certificates with an explicit focus on sustainable tourism in general, environmental certification schemes, such as the EMAS (European Management and Audit System) and ISO 14001 standards, which do not apply to a certain industry, are utilized by tourism businesses in some of the countries serving them as an environmental benchmark and indicating their environmental performance (e.g. Russia, Slovakia).

With regards to sustainability certificates concerning destinations the most disseminated certificate within the countries´ report seems to be the Green Destination label. It is the one label that has been

mentioned mostly by them, whereas the Biosphere Responsible Tourism Certificate is only represented in Spain and Portugal.

Furthermore, most of the countries have several tourism sustainability certification schemes at national as well as on regional level. They include for example: Austrian Ecolabel for tourism, Legabiente Turismo (Italy) or EcoRomania. More information regarding certification schemes for sustainable tourism can be found at the respective pages on the Tourism2030 Portal.

Thus, in most of the countries analyzed there are international and national (tourism) sustainability certification schemes established. Only a few countries either lack of suitable certification systems for sustainable tourism (Czech Republic, Hungary, Slovakia and Russia) or they are existent but these certification systems lack to generate the expected impact in terms of number of certified businesses and/or market positioning and/or general consciousness (e.g. Bulgaria). However, independently of the level of tourism certificates in the countries, all national reports outline that there is a need to foster certification as one important measure to support sustainable tourism development in an affirmed way.

Interestingly enough, some of the report countries partners pointed out that since the COVID-19 pandemic more national and international tourism organisations, tour operators and booking services than before are interested and feel encouraged promoting green travel options, such as certification, to the consumers.

Core achievements regarding sustainable tourism and the role of SMEs in it

Most of the countries are showing an overall positive trend in terms of the development and implementation of sustainable tourism in their countries, even though to a different extent and different spatial levels as well as in regard to the forms and fields of action. Moreover, some have only recently started getting engaged in matters of sustainable tourism development, in other countries sustainable tourism has already been an issue within political policies and agendas and/or in practice for many years.

Anyway, the core achievements mentioned in the country reports can be summarized as follows.

- **Integration of sustainable tourism issues in national policies and legislation**

  It seems that sustainable tourism has increasingly found its way into national tourism policies and strategies and therewith into strategic documents emphasizing the importance and promoting sustainable tourism development in a national context. Such more-in-depth commitment to sustainable tourism can especially be noticed within the countries national legislation, tourism strategies, plans or any similar guidelines providing directions to the tourism industry´s development, which include objectives for sustainable tourism and sometimes as well as respective action plans proposing specific measures. Anyhow, the degree of consideration and specification differs a lot between the countries. Only in a few countries sustainable tourism has been even set as a major priority of the national tourism policy.

- **Implementation and establishment of specific tools and instruments**

  A range of projects and initiatives have been implemented in the countries in support to sustainable tourism and SMEs. There are as well successful best practices available within the countries which serve SMEs or other tourism stakeholders as inspiring examples for the development of sustainable tourism products and activities. Furthermore, sustainable tourism certification schemes are available in most of the countries (see above) or they are of growing interest and are becoming more and more introduced as a profound basis to measure sustainability achievements. Most of the countries perceive an increasing interest in sustainability certification as a valuable contribution to the development of sustainable tourism, in some cases with distinct positive achievements. For example, Austria has noted significant environmental improvements in hotels through the implementation of sustainability certification.

- **SMEs seem to be more willing to commit themselves to sustainable tourism**

  According to the national reports SMEs are increasingly taking on voluntary commitments to become more sustainable and are more and more considering sustainability as a basic concept for their business operations in order to improve their competitiveness and overall market position. Some countries (e.g. France, Netherlands) even mentioned that a distinct shift of practices and projects towards sustainable tourism is notable among tourism businesses and that the number of companies going green clearly increased over the past years. This seems to be caused, for example, by the change of consumer demand based on more conscious choices by the tourists or economic reasons. It appears that in particular the COVID-19-Pandemic has been fostering the interest in sustainable tourism activities by SMEs. Besides, some countries also described that the concept of sustainable tourism is increasingly finding its way into the development of tourism products, which are created, for instance, in regard to the SDGs or to more strongly consider the natural values and cultural heritage of the country.

- **Networking and collaboration of tourism stakeholders is increasing**

  It is increasingly recognized and understood that it takes the responsibilities of all relevant stakeholders on the local, regional and national level to successfully move forward and to develop sustainable tourism in one's country in the long run. To achieve this, the formation of networks and a stronger collaboration is therefore considered as an important driver for a sustainable tourism development. The presence of networks and the level of cooperation and collaboration differ among the countries. In some countries networks of stakeholders have already been developed, others are still struggling to establish functioning structures for a better collaboration, and in quite some countries such collaboration structures are still completely missing (see also below - challenges).

- **Facilitation of sustainable tourism at regional and local level**

  In some of the country reports an effort is observed to more strongly link and integrate national sustainable tourism policies with the activities at the regional and local level. It has also been noticed that regional policies and strategies have started to pay more attention to

develop tourism more sustainably. Accoring to the national reports an increasing number of best practice examples as well as an increasing number of certified SMEs can be recognized at these levels.

Although the reports show that there is much positive progress in the path toward promoting and developing the tourism sector in European countries including a variety of sustainable practices and activities in all countries, the potential for further improvement and achievements is still high and yet to be tapped. Thus the sector is still facing many challenges and there is still a large scope as well as effort necessary for optimization.

Challenges for the development of sustainable tourism and for SMEs

Although progress of the development of sustainable tourism could be noticed in most of the countries, the sector still faces many challenges, in regard to a sustainable tourism development but as well as in regard to SMEs.

- **(Post)-COVID-19 situation**

  Currently, of course, the COVID-19-Pandemic imposes a major challenge to the tourism industry worldwide and in Europe, as it led to a collapse of almost the entire industry. Travel streams changed or stopped, activities ran down low or closed in these pandemic years (2020/2021) with the result of low to no income and a lot of businesses struggling to survive. Although COVID-19 support programs are available in most of the countries, it is questionable, whether all tourism businesses recover from the damages and how they will continue their operations.

  Anyway, it is stated as well that since the COVID-19 Pandemic more national and international tourism organisations, tour operators and booking services than before are interested and feel encouraged to promote green travel options to their consumers.

  Besides, the severe impacts of the pandemic on the tourism sector, which are still affecting the sector to a large degree, there are other challenges concerning the development of sustainable tourism as well as for SMEs. The main challenges noted within the national reports comprise the following ones:

- **Lack of consistent guidance for sustainable tourism in national policies**

  As already described above, sustainable tourism is represented in the national policies and strategies in most of the countries but, of course, to a different extent. However, in hardly any of the countries is sustainable tourism put in the centre of the national tourism policy as a priority area.

  Further deficits and challenges noted in the country reports include, for example, the lack of a long-term vision and planning as well as clear and consistent strategies for the stakeholders on how tourism should actually contribute to the sustainable development of the country, which also account for regional and local level, where respective tourism strategies are often missing. Thus, there seems to be a stronger need for the further clarification not only of the concept of “sustainable tourism” and what is actually meant by it but also a specification of the content and the terms of such strategic documents (e.g. national tourism plans or

strategies) underpinning them with concrete activities and measures (e.g. by the provision of an action plan). Additionally, it is mentioned that there is a lack of instruments or mechanisms as well as low capacity to monitor the state and the progress of sustainable development.

- **Implementation gap of sustainable tourism**

  Besides the above-mentioned deficits another major lack is seen in the low level of implementation of sustainable tourism practices in many of the countries analyzed. A lot more transversal action is needed to actually put policies and concepts into practice and implement sustainable tourism activities into daily business management and operations. And therewith fill the gap between good theoretical approaches and the general willingness to support a sustainable tourism development and the realization of it.

- **Limited financial support in regard to sustainable tourism activities**

  In the majority of the countries a lack of support and funding options is noted both regarding the financing of investments for business development and explicit funding programs for the promotion and the development of sustainable tourism development.

- **Lack of cooperation among relevant tourism-related stakeholders**

  Although improvements have been made, there still seems to be a lack of established connections among relevant tourism-stakeholders inhibiting to foster sustainable tourism development in joint action. Instead, the stakeholders tend to work all for themselves rather "struggling" on their own to overcome barriers to realize their ideas and concepts for sustainable tourism activities. This as well and especially accounts for the promotion of sustainable tourism products and is also true for the national level as well as for the regional and local levels.

- **Lack of resources to implement sustainability measures in tourism SMEs**

  In many countries the tourism sector is mainly characterized by micro, small and medium-sized enterprises, which lack of the necessary financial and personal resources to implement sustainability in their business in the long run. Therefore, much effort and support is needed, e.g. through capacity building and/or financial incentives, to convince decision makers of these businesses to get engaged in a process striving to make their business more sustainable.

- **Capacity building in the field of sustainability**

  The research shows that there are a variety of sustainability training courses existing and available for tourism SMEs throughout the analyzed countries. Anyhow, in many of the countries there seems to be an overall lack of human capacity building in the field of sustainability and specifically focusing on sustainable tourism issues, which can be seen as one reason that prevents SMEs to engage in sustainable tourism development. This includes on the one hand side the lack to obtain sustainability knowledge to better understand environmental and socio-cultural concerns to be tackled and on the other hand side the lack

of practical guidance and recommendations for action that provide advice and inspiration on the actual implementation.

- **Barriers to develop sustainable tourism at regional level**

  Planning and decision-making mechanisms at regional and local geographic levels and a willingness to commit to sustainable tourism (mostly) relates to the poor economic situation at these levels and to a rather moderate scale of expertise as well as state of human resources. Furthermore, the communication between the national and the regional to the local level could be improved to ensure a simple information flow and facilitate the process of coordination of planning and, last but not least, to act in concert with sustainable tourism development decisions and actions.

- **Climate change**

  Tourism is particularly vulnerable to the long-term impacts of climate change and its related stresses. Against this background and as the current realities of climate change development are unavoidable, tourism businesses are requested to take action that requires to invest in the implementation of adaptation and mitigation strategies aiming to minimize the risks imposed by the consequences of climate change to the tourism sector and to maintain tourism activities in long run. Thus, climate change will not only lead to risks but also faces businesses with economic challenges due to adaptation necessity.

- **Overtourism**

  The phenomenon of overtourism has been increasing and becoming a rising issue in many European destinations, especially for the ones aleady emphasizing on sustainable tourism**.** Therefore, there is a need for concepts regarding sustainable growth, which determine the carrying capacity and thresholds of relevant tourism destinations as overcrowded “places” which threaten the quality of tourist experiences and their long-term attractiveness. This again affects the operations of tourism businesses in those regions.

Recommendations for boosting sustainable tourism for SMEs in Europe

With regard to the information gathered within this report (see national chapters), the set of the following recommendations could be identified which should facilitate the development of sustainable tourism and support SMEs.

- **Improvement of sustainable tourism policies**

  A country´s tourism development is closely linked to its existing political policies. Only if the objective of a sustainable tourism development is recognized as an area of responsibility in the political environment, the tourism sector can orient itself towards it. Therefore, clear political commitments and respective policies at the state level are helpful, which can serve as an overall guidance for tourism stakeholders and which can be carried on and maintained at regional and local level. Such an overall commitment to sustainable tourism needs to be underpinned and specified through, for example, a common vision, integrated strategies, concrete plans and programs as well as efficient regulations, as this makes it easier for

decision makers of tourism entities to plan and implement sustainable tourism activities themselves.

Within the scope of the development of sustainable tourism policies a bottom-up approach is seen as most productive to include suggestions on sustainable tourism of a great variety of stakeholders considering as well regional and local needs. Besides an orientation of the tourism policy towards a green economy, a digital transformation is seen as an important milestone in this policy context.

- **Capacity building and awareness raising among the tourism businesses**

  The introduction and implementation of sustainability practices within a tourism business require specific competencies of their decision makers and employees. These requirements are not necessarily covered by the existing staff. In order to ensure confidence and to make informed decisions, there seems to be a need to build capacities and impart sustainability knowledge as well as to provide respective practical guidance to enable SMEs to improve their sustainability performance on their own. It has been pointed out in the country reports that the trainings offered should be tailored to the demand of the SMEs addressing specific topics, e.g. energy efficiency, biodiversity, employment policies or supply chain choices, but also introducing suitable tools and instruments, which can be easily applied and implemented in their daily business operations. The exchange of best practice examples between SMEs is seen as an especially valuable approach, which should be furthermore supported and facilitated. Besides, the trainings should also deal with motivation aspects, provide support for accessing funds for tourism development at national and European level and give advice on how to engage local residents in the sustainable tourism development process. Another aspect noted in the context was that SMEs should be ensured access to information on favorable terms, thus especially at low costs.

- **Awareness raising for sustainable tourism**

  Besides the elaboration and provision of capacity building activities for tourism SMEs, it seems necessary to – possibly in a first step – increase the awareness of businesses and other tourism stakeholders and sensitize them for sustainability issues. Suggestions include for example the conduction of more awareness raising campaigns to promote the principles and relevance of sustainable tourism as well as – in general – the advantages of a green economy among tourism SMEs. To communicate a consistent message and to avoid a large number of single events in parallel, it is suggested that stakeholders work together on this and coordinate the awareness raising activities by a selected board of relevant stakeholders.

- **Collaboration and networking among tourism stakeholders**

  As mentioned in many of the reports, the promotion and realization of a sustainable tourism development in a country as well as in its destinations requires a strong cooperation of many different tourism stakeholders. Working collaboratively and building networks and synergies among the actors involved is seen as crucial for a successful dynamic of national and regional development processes. A good and constructive communication culture building on mutual understanding is seen as important as well, as a large number of players must be able to

communicate and get along with one another. Financial synergies could be especially significant if the resources of partners are pooled and used effectively through collaboration. Proposed examples for intensifying and improving cooperation are: Encouragement of Public-private partnership, provision of (thematic) forums and (e.g. internet platforms), establishment of thematic networks or knowledge alliances, etc. Furthermore, the collaboration should comprise and be supported at all spatial levels.

When supporting a tourism development process based on the principles of sustainability, it is furthermore proposed that the collaboration should not only focus on tourism stakeholders but should also happen cross-sectoral and include distinct stakeholders at different levels of the service chain. Moreover, the public and/or the local population should also accompany this process from the beginning.

- **Financial support and incentives for SMEs for the development of sustainable tourism**

  Most countries agree that the facilitation and implementation of sustainable tourism practices must be accompanied by sufficient financial support for the tourism businesses (SMEs) that would support such a transition financially, e.g. in form of topic- and target-related funds or tax incentives. Currently, there seems to be the need to generally enable and/or increase public funding for tourism SMEs at national but also on regional and local level and therewith create benefits for SMEs and tourism stakeholders which commit themselves to sustainable tourism operations. The support should possibly be provided continuously and long-lasting. It is also suggested to include sustainability requirements in post COVID-19 subsidies and policies.