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**COMMISSION STAFF WORKING PAPER**

**COMMUNICATION ON BASIC ORIENTATIONS FOR THE SUSTAINABILITY OF  
EUROPEAN TOURISM**

*Extended impact assessment*

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## COMMISSION STAFF WORKING DOCUMENT

### COMMUNICATION ON BASIC ORIENTATIONS FOR THE SUSTAINABILITY OF EUROPEAN TOURISM

#### *Extended impact assessment*

#### **INTRODUCTION**

*'Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems'. (World Tourism Organisation definition)*

The Commission's Working group on environmental protection and sustainable development of tourism (2001) added:

*'It also needs the involvement and commitment of all concerned stakeholders.'*

The Extended Impact Assessment has been conducted on the basis of a consultation document on 'Basic orientations for the sustainability of European tourism' that largely corresponded to a first draft of the Communication. The document was the subject of an Internet public consultation from 25 April to 31 July 2003 and of a broad tourism multi-stakeholder dialogue, whose results, described under Section 7 of this report, have been included in the impact assessment.

This Communication spells out the approach and action required to improve the sustainability of European tourism and how the European Community, and particularly the European Commission, can contribute to the sustainability of European tourism and to provide stakeholders with basic ORIENTATIONS on the way to implementing sustainable tourism.

In defining this approach it was considered that it must be general enough to provide for sufficient flexibility at the appropriate implementation level. This approach recognises that there is no single model for implementing sustainable tourism management practices, as many different models for achieving sustainable tourism management exist.

Assessing the policy options in such a framework has proved to be a difficult task. The nature of the issues and of the options presented means that quantification of the impacts is not feasible. Techniques such as cost-benefit analysis and cost-effectiveness analysis cannot be used. Therefore, a qualitative assessment based on multi-criteria analysis was chosen as the most effective technique.

## **SUMMARY**

### **• THE CHALLENGES**

The challenges to be met in order to ensure the sustainability of tourism alongside the current benefits that tourism can bring concern the risk of consuming its environmental, cultural and social quality assets, so that it would lose its privileged competitive position in the global tourism market, with its potential to create employment being severely damaged.

The major challenges mainly comprise unsustainable patterns of tourism consumption (tourist behaviour) and production (practices of enterprises and destinations as tourism providers), in particular with regard to:

- a) *the temporal and spatial concentration of tourism activity* (that results in overcrowding and low quality, and requires enormous overcapacity);
- b) *travel patterns with intensive transport use* (e.g. leisure tourism counts for half of medium and long-distance transport, and tourism-related air transport is expected to double in a decade); and
- c) *the interaction between climate change and tourism* (resulting in reciprocal effects).

These challenges need to be managed through a coherent and integrated partnership in dialogue with all tourism stakeholders to balance the different interests and objectives.

### **• THE OVERALL OBJECTIVE**

The overall objective is to promote further progress towards the sustainability of tourism in Europe and world-wide, stimulating multi-stakeholder efforts to this end across all territorial and administrative levels, and to outline how the Community and the other stakeholders can contribute further. The Communication builds upon the international and EU approach on sustainable development, the relevant policies and initiatives that impact tourism, and third party initiatives with a view to exploiting synergies through a partnership approach. This is expected to provide better integration and coherence between territorial levels and more effective action at the right level with adequate monitoring.

### **• THE POLICY OPTIONS**

Four policy options were identified for reaching the objective: (A) a comprehensive Community policy in the field of tourism; (B) a scenario of non-action by the EU; (C) relying on existing contributions inside and outside the Community; and (D) reinforcing the existing framework and improving it with suitable measures. Generally speaking, these options differ with regard to the intensity in dealing with sustainability at Community level and correspond to different degrees of subsidiarity and proportionality.

Options (A) and (B) either did not find sufficient Member State support or were considered contradictory to the Community approach to sustainability. The reliance on subsidiarity decreases from Option (B) to (C) to (D) to (A), whereas proportionality and resources needed increase in the same order, but combined with strong political uncertainty for option (A).

### **• ASSESSMENT OF THE IMPACT OF THE POLICY OPTIONS**

A no-action scenario or one which relies only on existing contributions (Options (B) and (C)) would fail to encourage sustainable tourism consumption and production, with no possibility of measuring and reporting on the impact of tourism in a transparent and reliable manner.

Options (A) and (D) are the most likely to achieve progress. However, implementing Option (A) would require substantial resources, and several Member States and certain industry bodies, in particular most of those representing European private entrepreneurs in the tourism sector, strongly oppose it. Option (D) is most effective and flexible in meeting the challenges whilst respecting the principles of subsidiarity and proportionality and enabling individual solutions to be found for challenges in each type of destination.

Option (D) has the potential to better fine-tune Community policies affecting tourism, so that they are more effectively used and enhanced, and better coordinated internally. It promises better synergies and close dialogue with relevant stakeholders, and makes it possible to assist SMEs in meeting both consumer demands for quality and local communities, peripheral regions and candidate countries with a flexible approach that recognises the diversity of the European tourism industry and destinations. It provides for greater consideration of corporate social responsibility issues in tourism and results in greater benefits in the short term with multiplier effects increasing over time. It can serve as a sector-specific contribution to changing unsustainable patterns of consumption and production, to which the Community has been committed since the Johannesburg 2002 World Summit on Sustainable Development.

- **IMPLEMENTING THE PROPOSAL, MONITORING AND REPORTING**

Implementation (starting in 2004) will be based above all on the initiatives of responsible stakeholders and on tourism-related Community policies and programmes. The Community role will be a catalytic one, stimulating further input in the areas of:

- (a) *Community contribution to governance and sustainability of European tourism* by a systematic use of the Impact assessment tool to integrate sustainable tourism concerns into related Community measures, and by appraising their effectiveness in this respect;
- (b) *cooperation with stakeholders*, fostering cooperation with the World Tourism Organisation and launching a Tourism Sustainability Group to allocate specific activities and responsibilities to the various tourism stakeholders, and to steer, monitor and evaluate the implementation of this process; and
- (c) *awareness raising and proactive dissemination of best practices regarding sustainable tourism consumption and production patterns*.

- **STAKEHOLDER CONSULTATION**

The Commission involved all interested stakeholder groups and worked with a steering group to receive regular external feedback on its work and ideas. The input from this process served to draft a consultation document for the 3-month Internet consultation, and for this Extended Impact Assessment (ExIA). The outcome of the open consultation, the feedback from the usual interlocutors in regular consultations, and the comments by other services in the internal steering group that accompanied the ExIA were integrated into the draft Communication.

- **COMMISSION DRAFT PROPOSAL AND JUSTIFICATION**

A reinforcement of the existing framework, with the addition of suitable tourism-specific measures, provides a feasible and appropriate EU approach with regard to both the important challenges and the proportionality and subsidiarity principles. The objectives and challenges identified are dealt with through an integrated and cooperative approach with all stakeholders. It is fully compatible with the existing Community policy framework regarding related Community competencies, and it requires a modest resource input that can be managed with the existing human resources of the Tourism Unit and the recently shown cooperative attitude of most Commission services on tourism-related issues.

## 1. WHAT ISSUE/PROBLEM IS THE POLICY/PROPOSAL EXPECTED TO TACKLE?

- **What is the issue/problem in a given policy area expressed in economic, social and environmental terms including unsustainable trends?**

The tourism sector is facing a series of challenges that need to be tackled to ensure tourism sustainability alongside the current benefits that tourism can bring. Tourism is affected by policies such as those relating to employment, regional development, environment, consumer protection, health, safety, transport, taxation and culture. Table 1 gives an overview of the main issues and related challenges to be addressed.

**TABLE 1: ISSUES AND PROBLEMS OF EUROPEAN TOURISM**

*general:*

- Temporal and spatial concentration of tourism activity.
- Impact of extreme weather events on tourism.
- Low consumer awareness of sustainable tourism.
- Insufficient sound sustainable destination management.

*economic:*

- Risks / quality gaps that European tourism industry may not remain competitive.
- Risk of supply market dominance linked to further integration of tourism suppliers.
- Lack of internalisation of socio-economic and environmental costs.
- Challenges from greater use of and dependency on Information Technologies
- Shortages of skilled workers.
- Partial over-capacity in large infrastructure and in enterprises.
- Insufficient sustainable economic investment and infrastructure development in destinations and local communities.
- Partly insufficient secondary effects on the local economic development (re-spending more income received by the sector within the destination economy) that complement the initial direct effects of tourism.
- Changes in the European demographic structure and tourist preferences that lead to increasing demand for alternative forms of tourism and for sustainable management of classical types of tourism activity.

*social:*

- Underdeveloped social responsibility in tourism.
- High number of staff without continuous employment with a potential effect on qualification levels and service quality
- Risk of losing social and cultural environment and not creating sufficient social capital for local communities.
- Increasing number of tourists with special needs, and gaps in tourism for all.
- Risk of not matching tourist safety requirements.

*Environmental:*

- Air pollution caused by travel patterns and tourism transport.
- Pollution at destinations.
- Degradation of natural and cultural resources at destinations.
- Geographical shift of environmental load to areas not sufficiently equipped.
- Difficulties in the sphere of land use and land management.

- **What are the risks inherent in the initial situation?**

Through its current patterns of consumption and production, tourism can have negative impacts on the economic, social and environmental pillars of sustainability. The risk of consuming its environmental, cultural and social quality assets could drive European tourism to lose its privileged competitive position in the global tourism market.

During the past 50 years, European tourism has experienced a more or less steady, high growth. Over the same period it has been confronted with a wide range of changes in demand, regional increase and decrease of tourist flows, differences in tourists' motivations and expectations, and organisation of supply<sup>1</sup>. A major risk is that of incompatibility between safeguarding natural and cultural local resources as well as the community identity and their tourist use and the need to build a consensus among the different supply stakeholders and coordinate their actions. The tourism sector is characterised by a fragmented approach and the insufficiently coordinated strategy at the decision-making level.

*Temporal and spatial concentration of tourism activity*

The monthly distribution of tourism activity in Europe shows that the high peak of tourism in the summer months has continued without interruption alongside the overall increase of tourism throughout the year. The temporal concentration of tourism activity accompanied by a spatial concentration on specific destinations creates further impact on natural and cultural resources at the destination, as well as the quality of the experience for the tourist. In addition, tourist facilities may be empty or suffer from low occupancy/visitor rates for many days of the year. Italy, for instance, is reported to have an index of utilisation of bed-places in hotels and similar accommodations of almost 70% in summer but only around 20% in low season.<sup>2</sup> Off-season operation leaves over-capacity in large infrastructures and in enterprises. It results in high numbers of staff without continuous employment who may suffer poor conditions, with negative effects on qualification levels and service quality.

*Travel patterns and increasing transport use*

Tourism has been identified as the main growth factor behind the increase in demand for passenger transport with predictions speaking of passenger air travel doubling by 2010, compared to 1995<sup>3</sup>. From these data, transport is expected to become the most important environmental impact due to tourism, with travel to and from destinations being responsible for 90% of the energy used in the sector. Innovations in technology have meant reduced journey times, improved capacity, and a decrease in real terms in transport prices, including the prices of cars and airfares. The decrease in travel costs, mainly for air transport (more acute because of low-cost carriers), has increased the attractiveness of intra-European travel and personal mobility with an even larger share of the population being able to travel and shorter and more frequent trips being encouraged. This, in turn, has placed significant demands on the transport systems in the resorts themselves.

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<sup>1</sup> European Commission: 'Early warning system for identifying declining tourist destinations, and preventive best practices'

([http://europa.eu.int/comm/enterprise/services/tourism/studies/tno/tno\\_en.pdf](http://europa.eu.int/comm/enterprise/services/tourism/studies/tno/tno_en.pdf)).

<sup>2</sup> Eurostat: 'Tourism statistics-yearbook' data 1990, 1995, 1997-2000.

Eurostat: 'Tourism and the environment' (<http://europa.eu.int/comm/eurostat/Public/datashop/print-product/EN?catalogue=Eurostat&product=KS-NP-02-040--N-EN&mode=download>).

<sup>3</sup> European Environmental Agency: 'Tourism indicators'

[http://themes.eea.eu.int/Sectors\\_and\\_activities/tourism/indicators.html](http://themes.eea.eu.int/Sectors_and_activities/tourism/indicators.html).

For intra-European tourism, the impact of the increasing demand for transport use is accompanied by the existing travel patterns which show the private car as the dominant transport mode (58%), followed by air (31%) and rail travel (10%). Although the use of rail travel has been declining, the demand for this mode by both business and holiday travellers is starting to increase in some European countries. On the other hand, air travel has grown dramatically in the last 30 years, more than any other transport mode. Passenger-kilometres have increased by 7.4% per year on average since 1980<sup>4</sup>.

### Climate change and tourism

Recent extreme weather events have attracted public attention to the challenge posed by the potential impacts of climate change for a number of holiday destinations. Tourism, like many other economic sectors, has an inter-relationship with climate change that results in reciprocal effects (the tourism and travel induced emission of greenhouse gases which contribute to climate change and climate change might *inter alia* affect tourism).

The degree of the impact of climate change on tourism cannot yet be properly forecast. But, there are some predictions and working hypotheses that speak of *direct impacts* on the choice of destinations (regarding both the time and the location for taking holidays). Some might become less attractive as temperature and humidity increase above comfort levels, and others might turn more attractive as mild temperatures become more of a certainty. Rainfall changes, floods and droughts are also reported to directly affect tourism choice. But there are also *indirect impacts* such as, for instance, the link between a rise in sea level and its effect on coastal erosion, and the decrease of snow cover and thence of skiing in mountain resorts<sup>5</sup>.

#### • **What are the underlying motive forces?**

The sustainable development of European tourism is a prerequisite for its future competitiveness and for using its potential to create employment. This has been repeatedly confirmed in the various documents adopted by the Commission, the Council and the other Community Institutions. Secondly, as tourism is one of the most important sectors in the economy, its sustainability contributes significantly to the overall progress in sustainable development. Such progress will suffer if tourism is not managed and developed in a sustainable way, i.e. if its current patterns of consumption and production persist.

#### • **Who is affected?**

### The tourists as consumers

Tourism products and services are consumer driven. The role that tourists as consumers can play in reducing the impact of the problems through a more sustainability-oriented demand illustrates the potential of consumer awareness of sustainable tourism to trigger changes in the product offered. Enterprises and destinations need to pay more attention to environmental issues in the future<sup>6</sup>. So far, environmental care is a major issue for the big players in the tourism market who also use the marketing potential of environmental care for their businesses. In addition to the price and quality offered, consumers have started considering

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<sup>4</sup> European Commission: 'Structure, performance and competitiveness of European tourism and its enterprises'. [http://europa.eu.int/comm/enterprise/services/tourism/studies/pwc/pwc\\_en.pdf](http://europa.eu.int/comm/enterprise/services/tourism/studies/pwc/pwc_en.pdf)

<sup>5</sup> EEA: 'Europe's environment: the third assessment'  
[http://reports.eea.eu.int/environmental\\_assessment\\_report\\_2003\\_10/en](http://reports.eea.eu.int/environmental_assessment_report_2003_10/en).

<sup>6</sup> See note 1.

the environmental effort of the company as a determinant of choice. There is still much to be done to increase sustainability awareness among tourists. How far the willingness to pay more for sustainable products and services could go is still an issue subject to debate<sup>7</sup>.

Changes in the demographic structure of Europe may have an influence on new tailor-made tourism products and services. The European population is getting older but staying active longer. Thus, older people will become more important to the tourism market, increasing the overall number of tourists and potentially demanding different types of tourism.

### The Tourism SMES

Currently, SMEs, because of low consumer awareness, mostly consider that these issues are unimportant, but a trend towards higher awareness is taking place. For instance, the accommodation sector has started to use reusable products (about 20% of accommodation SME companies consider environmental care as a top priority<sup>8</sup>). SMEs need to build further on these experiences.

Industry representatives recognise that there is an increasing trend for developing new forms of tourism, especially those related to nature and wildlife, rural areas and culture, and that these are influencing traditional package tours<sup>9</sup>. This type of tourism is expected to grow faster than any other market segment. So-called eco-tourism is expected to grow 20% annually world-wide compared with just 7% for tourism overall<sup>10</sup>.

Ethical issues are also gaining importance for tourism enterprises. Research suggests that, following the trend in other economic sectors, social responsibility and corporate citizenship are expected to increase in importance in the tourism industry<sup>11</sup>. This means implementation of adequate CSR practices for tourism value chain services and enterprises of all kinds and sizes, and looking at the sustainable methods and products available.

European Tourism SMEs, despite increasing consolidation and vertical integration, still dominate the sector, with over 99% of companies employing fewer than 250 individuals. However, a few large companies manage a significant proportion of the volume of trade, particularly at an international level. Optimising the synergy between producers and travel organisers and between different modes within a sub-sector of the tourism industry is likely to remain very important to competitiveness.

By using information technology (IT), tourism SMEs should be able to compete with larger players. However, the uptake of IT has not yet achieved an optimal threshold<sup>12</sup>.

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<sup>7</sup> e.g.: ABTA Research October 2000 (Association of British Travel Agents): '85% of people thought it was important that tourism should not damage the environment, and that 64% would be willing to pay £10 to £25 extra to ensure standards were met, representing a 2 - 5% price increase on a £500 holiday.'

<sup>8</sup> See note 4.

<sup>9</sup> WTTC, IFTO, IH&RA, ICCL & UNEP (2002): 'Industry as a Partner for Sustainable Development: Tourism'

<sup>10</sup> Worldwatch Paper Institute Paper 159: 'Travelling Light: New Paths for International Tourism' 2001. <http://www.worldwatch.org/pubs/paper/159/>.

<sup>11</sup> See note 9.

<sup>12</sup> See note 4.



### The tourism workforce

Positive social impacts arise mainly through tourism's contribution to employment, worker training and the development of SMEs. The sector employs a significant proportion of women, minorities and young people. In developed countries, unemployment levels are especially high for unskilled labour, thus additional demand for low-skilled labour is of high economic and social value.

The seasonal concentration of demand results in high numbers of staff without continuous employment who may suffer poor conditions, with negative effects on qualification levels and service quality. This in turn has an impact on the competitiveness of the supply chain, as quality in the tourism product cannot be achieved without the skill and motivation of the workforce. In addition, the industry has serious shortages of skilled workers<sup>13</sup>.

### Tourist destinations

Tourism services together with the destination itself make up the tourism experience.

Tourism can support economic development and is an important element of many countries' economies. The inflow of revenue to tourist destinations creates business turnover, household income, employment and government revenue.

Tourism can be more effective than other industries in generating employment and income in less-developed, often peripheral, regions with limited alternative opportunities for development. Tourism affects the economy beyond the industry itself. A proportion of the sector's income is spent in the destination's wider economy, thereby creating further economic activity. These indirect effects can exceed the initial direct effects (tourism income not only creates jobs in the tourism industry itself but also in associated industries, such as agriculture, transport, manufacturing, etc.)

SMEs believe that inadequate public infrastructure hinders their growth, as recent analysis shows<sup>14</sup>. Infrastructure issues are becoming more acute with the continuing increase in passenger travel. However, increased environmental concerns may affect infrastructure development; for example, proposals for airport expansions are often fiercely disputed. Tourism can also contribute to better infrastructure such as improved water supply or waste treatment, leading to greater environmental protection.

Cultural assets are a basic resource of tourist destinations. However, tourism risks contributing to the homogenisation of global products and services that lack local identity. Local identity is at particular risk where the ratio between tourists and locals is high.

Sustainable tourism entails the preservation of local cultures.

The impact of terrorist attacks in the recent past has focused more attention on tourism safety and security issues. As part of the image of destinations these are key issues in tourism and destination marketing which need to be addressed at decision-making level. The need for marketing organisations to demonstrate that destinations are safe for tourists has become increasingly important since consumer awareness is growing rapidly. Similarly crisis and risk management in the tourism industry has become important for all tourism stakeholders.

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<sup>13</sup> See note 9.

<sup>14</sup> See note 9.

Natural resources are a basic resource of a tourist destination, and sustainable destination development requires the protection of both the environment and natural resources. Scenery is the main factor in choosing a destination for 49% of European holidaymakers<sup>15</sup>. Although very few Europeans report specific problems encountered on holiday, when they do it is the general state of the environment (9%) and the state of the environment in the tourist areas they visit (8%) which are highlighted. Thus, environmental degradation can threaten the viability of the industry. Negative impacts from tourism (see table 1) occur when the environmental carrying capacity of a destination is exceeded. Sound environmental destination management can reduce the environmental impact of tourism especially in fragile ecosystems.

However, tourism can also raise awareness of the value of environmental assets and contribute financially to the creation and conservation of natural parks and protected areas. The relationship between tourism and the environment is complex and varies according to a range of factors including the number and seasonal variation of tourists, the concentration, the recreational activities they pursue, the type of environment affected and the infrastructure and management in place.

- **What would happen under a “no-policy change” scenario?**

A no-policy change scenario would fail to reverse the unsustainable trends in European tourism and fail to cope with the issues and problems of tourism sustainability. Continuing growth of tourism would over-proportionally augment the risks inherent in the situation which are marked by its partially unsustainable patterns of consumption and production, and make them materialize. More sustainable consumption and production patterns in the tourism sector would not be encouraged, and there would be no possibility of measuring and reporting on the impact of tourism in today's society in a transparent and reliable manner.

This scenario would lack a strong and cooperative partnership between the public authorities, trade organisations and unions, the private sector and society, and which would allow responsibility for delivering and ensuring tourism sustainability to be shared. It would mean that governments neither integrate tourism concerns into the overall set of related policies, nor set up, in consultation with all stakeholders, a capacity-building framework with realistic objectives to facilitate an uptake of existing and future guidance for the implementation of sustainability management practice.

Without sustainable development, European tourism's quality and future competitiveness, and its potential to create employment, would be severely damaged. Overall progress in sustainable development would suffer as well. In Europe, certain tourist destinations would enter into a phase of decline that they could not overcome, with important negative effects on the entire local economy and social tissue linked to it.

In conclusion, although the potential for a sustainable growth of European tourism exists, it would be jeopardised if policy did not change.

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<sup>15</sup> European Commission (1998): 'The Europeans on Holiday 1997-1998', A Eurobarometer Survey.

### **3. WHAT MAIN OBJECTIVE IS THE POLICY/PROPOSAL EXPECTED TO REACH?**

- **What is the overall policy objective in terms of expected impacts?**

The overall policy objective of the Communication is to promote further progress towards the sustainability of tourism in Europe and world-wide, stimulating multi-stakeholder efforts to this end across all territorial and administrative levels and to outline how the Community and the other stakeholders can further contribute to them. This overarching objective is expected to be achieved through the following three specific objectives:

- a balanced approach based on the three pillars of sustainability;
- sustainable consumption patterns; and
- sustainable production patterns in the supply chain and sustainable destination development.

- **Has account been taken of any previously established objectives?**

The Communication takes into account relevant policies and documents at EU and global level that focus on sustainable development and sustainable tourism (see Table 2). The approach developed builds upon existing Commission and third party initiatives and sets up new ones, in order to tackle the challenges and achieve the objectives without duplicating efforts, in a broad partnership with all tourism stakeholders.

The Communication addresses objectives such as sustainable consumption and production patterns, quality development and the competitiveness of the industry, the case for the production of new jobs and improvement of working conditions in existing employment, the protection and restoration of the environment and natural resources as well as respect for the carrying capacity, and corporate social responsibility.

The results of the consultation that the draft has undergone confirm the objectives set and support the fact that the horizontal objectives might be further broken down when dealing with implementation at the appropriate level.

Through the chosen cooperative approach, sustainable tourism is expected to contribute to the overall EU sustainable development strategy by providing better integration and coherence between territorial levels and more effective action at management level with adequate monitoring.

In addition, through the link to the Sustainable Development Strategy, the Communication links to existing approaches in the Member States and to relevant EU milestones, such as the 'Lisbon Process', designed to make the EU the most competitive and dynamic knowledge-based economy in the world, and the 'Cardiff Process' on integrating environmental issues into other areas of policy. The Sixth Environmental Action Programme will also play an important role, setting binding environmental objectives for the EU over the decade to 2010. Finally, the Communication also responds to the outcome of the Plan of Implementation of the World Summit on sustainable development regarding tourism through the development of a transparent multi-stakeholder process.

**TABLE 2: OVERVIEW OF PREVIOUSLY ESTABLISHED OBJECTIVES**

<b>European Union</b>	
<b>Reference</b>	<b>Objectives/messages relevant to Sustainable Tourism</b>
<i>'Tourism and Employment Process'</i>	<p>Messages from European Conference on Tourism and Employment<sup>*</sup>, Luxembourg European Council on Employment<sup>**</sup>, Council of Ministers (Tourism)<sup>***</sup>, conclusions and recommendations of the High Level Group on tourism and employment<sup>****</sup>:</p> <ul style="list-style-type: none"> <li>• the need to improve the quality and competitiveness of European tourism;</li> <li>• the need to help SMEs and promote partnerships at all levels;</li> <li>• the need to create a favourable environment for tourism; and</li> <li>• the need to improve the quality of human resources;</li> </ul> <p>Messages from the Report of the working groups<sup>*****</sup>:</p> <ul style="list-style-type: none"> <li>• the need to highlight the fundamental role of information, knowledge and its dissemination;</li> <li>• the need for competent human resources motivated by medium and long-term prospects;</li> <li>• the integration of environmental policy and the promotion of sustainable tourism;</li> <li>• the need for European harmonization of the concept of quality of tourism services and infrastructures, and its assessment and monitoring;</li> <li>• the need to speed up the integration of information society tools and services in all tourism activities and businesses, in particular SMEs; and</li> <li>• the need for a network of stakeholders involved and a generalized partnership, particularly those in the field to ensure implementation of all the recommendations.</li> </ul>
<i>"Working Together for the future of European tourism"</i>	<ul style="list-style-type: none"> <li>• "to create the conditions and provide the basis for sustainable, high-quality tourism and competitive European tourism businesses"; and</li> <li>• "increasing the basic knowledge of this economic activity, increasing the competitiveness of its business, improving the sustainable development of tourism in the EU and its contribution to job creation".</li> </ul>
<i>EU Strategy for Sustainable Development</i>	<ul style="list-style-type: none"> <li>• limit climate change and increase the use of clean energy;</li> <li>• address threats to public health;</li> <li>• manage natural resources more responsibly;</li> <li>• improve the transport system and land use management;</li> <li>• combat poverty and lack of social cohesion; and</li> <li>• deal with the economic and social implications of an ageing population.</li> </ul>
<i>6th Environment Action Programme "Environment 2010: Our future, our choice"</i>	<ul style="list-style-type: none"> <li>• emphasising climate change as an outstanding challenge and contributing to stabilising greenhouse gases concentrations;</li> <li>• protecting, conserving, restoring and developing the functioning of natural systems, natural habitats, wild flora and fauna with the aim of halting desertification and the loss of biodiversity, both in the EU and on a global scale;</li> <li>• contributing to a high level of quality of life and social well being for citizens by providing an environment where the level of pollution does not give rise to harmful effects on human health and the environment and by encouraging a sustainable urban development;</li> <li>• better resource efficiency and resource and waste management to bring about more sustainable production and consumption patterns, thereby decoupling the use of resources and the generation of waste from the rate of economic growth and aiming to ensure that the consumption of renewable and non-renewable resources does not exceed the carrying capacity of the environment;</li> </ul>
<i>"European transport policy for 2010: time to decide"</i>	<ul style="list-style-type: none"> <li>• achieve a transport system that is more efficient, sustainable and of higher quality; and</li> <li>• "break the link gradually between transport growth and economic growth" by "shifting the balance between the modes of transport".</li> </ul>
<i>Communication on Corporate Social Responsibility</i>	<ul style="list-style-type: none"> <li>• increase the knowledge about the positive impact of CSR on business and societies in Europe and abroad, in particular in developing countries;</li> <li>• develop the exchange of experience and good practice on CSR between enterprises;</li> <li>• promote the development of CSR management skills;</li> <li>• foster CSR among SMEs;</li> <li>• facilitate convergence and transparency of CSR practices and tools;</li> <li>• launch a Multi-Stakeholder Forum on CSR at EU level;</li> <li>• integrate CSR into Community policies.</li> </ul>

<b>Global and International</b>	
<b>Reference</b>	<b>Objectives/messages relevant to Sustainable Tourism</b>
<i>Agenda 21 for the Travel and Tourism Industry</i>	<p>Overall aim for the Government departments, national tourism authorities and representative trade organisations:</p> <ul style="list-style-type: none"> <li>• “To establish systems and procedures to incorporate sustainable development considerations at the core of the decision-making process and to identify actions necessary to bring sustainable tourism development into being.”</li> </ul>
<i>WSSD Plan of Implementation</i>	<ul style="list-style-type: none"> <li>• “fundamental changes in the way societies produce and consume are indispensable to achieve global sustainable development”, it adds that these changes should be promoted by all countries, and should involve governments, relevant international organisations, the private sector and all major groups;</li> <li>• “(...) to increase the benefits from tourism resources for the population in host communities while maintaining the cultural and environmental integrity of the host communities and enhancing the protection of ecologically sensitive areas and natural heritages (...) and (...) in order to contribute to the strengthening of rural and local communities.”;</li> <li>• the importance of the development of integrated water resources management in general;</li> <li>• the importance of integrated and sustainable development of coastal zones because they are critical in “sustaining economic prosperity and well being of many national economies”;</li> <li>• the protection of the marine environment from land based activities (like tourism);</li> <li>• the importance of the protection and conservation of mountain environments; and</li> <li>• the importance of biodiversity and its protection and conservation.</li> <li>• “an effective institutional framework for sustainable development at all levels is key to the full implementation of Agenda 21 (...) and meeting emerging sustainable development challenges” (item 137). It adds that good governance is essential to achieve sustainable development</li> </ul>
<i>Global Code of Ethics for Tourism</i>	<ul style="list-style-type: none"> <li>• “(...) to promote an equitable, responsible and sustainable world tourism order, whose benefits will be shared by all sectors of the society in the context of an open liberalized international economy (...)”</li> </ul>
<p>* European Commission (1997): Employment and Tourism: guidelines for action, Final Report, Luxembourg 4-5.11.1997.  ** European Council of Luxembourg, 21-22.11.1997  *** Conclusions of the Tourism Council of 26.11.1997  **** European Commission (1998): European Tourism – New partnerships for employment: conclusions and recommendations of the High Level Group on tourism and employment, October 1998  ***** The complete text of the reports of the five Working Groups is available at <a href="http://europa.eu.int/comm/enterprise/services/tourism/index.htm">http://europa.eu.int/comm/enterprise/services/tourism/index.htm</a></p>	

#### 4. WHAT ARE THE MAIN POLICY OPTIONS AVAILABLE FOR REACHING THE OBJECTIVE?

- **What is the basic approach for reaching the objective?**

The basic approach for reaching the objective of further promoting progress towards sustainability of tourism in Europe and world-wide depends on the policy option chosen. The following policy options were considered:

- A) a comprehensive genuine Community policy in the field of tourism;
- B) a non-action scenario;
- C) relying on established contributions, i.e.
  - a) building on the activities of other stakeholders, and
  - b) integration of the sustainability of European tourism into established Community measures;
- D) reinforcement and best use of the existing framework for action.

- **Which policy instruments have been considered? What are the trade-offs associated with the proposed option? What “designs” and “stringency levels” have been considered?**

*A) Comprehensive Genuine Community Policy in the Field of Tourism*

This option means the strongest Community involvement in the development of a genuine Community policy in the field of tourism. It would include the formulation and implementation of tourism-specific actions, requiring a greater input of resources from the Commission.

The Commission favoured this option until a few years ago, and many consultation respondents supported it. However, given the reality in the field of tourism and the position of some Member States on such an approach, this option cannot be considered feasible for achieving rapid progress towards sustainability in European tourism. Furthermore, any legislative approach would be opposed by the tourism industry.

Bearing in mind that the European tourism industry involves many different public and private stakeholders with very decentralised competencies, often at regional and local levels, it can be considered that this option would not be compatible with the principle of subsidiarity. Solutions to issues that can best be dealt with at the local level do not benefit from a generalised European framework. A ‘top-down’ approach cannot be expected to demonstrate identifiable or quantifiable added value. The concerns of SMEs which dominate the industry can be better addressed otherwise.

*B) Non-Action Scenario*

A wide range of stakeholder initiatives and contributions address various aspects of sustainable tourism at different levels, although consideration of the current challenges faced by the European tourism sector suggests that the existing initiatives and contributions by the different stakeholders have not yet achieved a sustainable managed European tourism.

Under the ‘non-action’ scenario, the Commission would rely on these activities without taking any further action, either in terms of general policies that may affect tourism or specific tourism measures. This would represent a reduction in European-wide action compared to the current situation and to the measures provided for in the different Community policy fields.

Consultation responses demonstrate that experience to date has shown that ‘bottom-up’ environmental initiatives can work effectively, and there is strong support for voluntary initiatives, particularly from industry representatives. However, they also suggest that this is not sufficient. Given the importance of the tourism sector to the EU economy and the associated magnitude of both social and environmental impacts, it can be considered that certain Community-level action in this field is needed.

In general, most stakeholders consider this option unacceptable. Some stress that although voluntary schemes are an important step towards more responsible tourism. However, owing to their proliferation, their benefits and effectiveness are not sufficiently clear, particularly to consumers. In addition, even if voluntary measures were to gain acceptance, they would not be enough to prevent negative impacts from tourism.

### *C) Relying on Established Contributions*

This option uses a two-fold approach based on both building on the activities of other stakeholders and the effect of established Community measures on the sustainability of tourism. The latter aspect distinguishes it from the ‘non-action’ scenario (B), with a significant Community activity, but not one targeted on tourism. It would not further stakeholder initiatives through specific Community support and involvement from the tourism point of view. The principle of subsidiarity would be respected: responsibility for tourism-specific initiatives would remain entirely with these stakeholders.

The tourism sector benefits from a number of EU-wide initiatives to promote sustainability in general. With regard to the Community contribution to the sustainability of European tourism, this option relies exclusively on these policies and measures, excluding any tourism-specific Community activities to improve sustainability. It does not allow for any human or financial resources to be used by the Commission in the sphere of tourism.

But this option fails to address the specific challenges faced by the tourism industry adequately. Some stakeholders emphasise the importance of ensuring that general Community measures take account of tourism sustainability, but few of them consider this to be sufficient.

### *D) Reinforcement and Best Use of the Existing Framework for Action*

Building on the previous options, Option D strengthens the existing framework for action by reinforcing existing stakeholder initiatives, other than those of the Community, in this field, and further involves the Commission by:

- optimising the effect of Community policies and measures on the sustainability of European tourism; and
- the definition and implementation of complementary specific measures in the sphere of tourism for the purpose of promoting sustainability throughout the Community, which particularly targets the support of and involvement in other stakeholders’ initiatives and which fills the gaps left by Community policies and measures affecting tourism.

This approach enables stakeholders to take action at the appropriate level and acknowledges the important role of the tourism industry in the move towards sustainable development. Thus, the principles of both subsidiarity and proportionality are potentially respected.

This option is in line with the conclusions at its seventh session of United Nations Commission on Sustainable Development (UNCSD7) as well as those of the European Tourism Forum. It coincides with a repeated call for the Commission to strengthen the coordination between Community policies affecting tourism. A double approach was identified, which favours using the full potential of a range of Community policies and organising coordination and cooperation with all stakeholders on subjects of common interest. This option has received strong support from stakeholders who advocate explicit guidance towards sustainable tourism rather than a reliance on other guidance affecting tourism practices by default. Stakeholders believe that the Commission should be more active when reinforcing the existing framework for action, in order to act in proportion to the magnitude of impacts. The main challenge this policy option has to address is the question of how coordination at a European level can make efforts at a local level more efficient or effective.

- **Which options have been discarded at an early stage? How are subsidiarity and proportionality taken into account?**

Options A) and B) could have been discarded at an early stage, owing to a lack of Member State support or to being politically incompatible with the general Community approach to sustainability. Nevertheless, to get the widest possible picture, all options were assessed in terms of the extent to which they address challenges and objectives.

The different policy options relate to several degrees of intensity in dealing with sustainability at Community level, and therefore take subsidiarity and proportionality into account differently, as indicated above for each of the options (see table 3)

The reliance on subsidiarity decreases from Option B) to C) to D) to A), whereas proportionality increases in the same order, together with the level of resources needed to implement them, but is combined with a high degree of uncertainty for option A). The latter option also risks going beyond the reality of the tourism sector, which often operates at regional and local levels. Its lower reliance on subsidiarity is not matched by a true perspective of significant additional benefits.

There is greater confidence that Options D) and A) will meet the objectives of the proposal. Options B) and C) reflect either a general withdrawal from the sustainability policy or one sector, i.e. tourism, with particular added value for sustainable development in general. They have no potential of significant improvements in currently unsustainable trends and would be a step backwards compared to the current situation.



**TABLE 3: ASSESSMENT OF THE POLICY PROPOSALS WITH REGARD TO THE SUBSIDIARITY AND PROPORTIONALITY PRINCIPLES**

	SUBSIDIARITY	PROPORTIONALITY
POLICY OPTION A	Unlikely to find unanimous Member State support. Legislative approach would be opposed by the industry. Unable to deal efficiently with the local and regional nature of the sector.	Uncertainty at this stage regarding how this policy would be formulated.  Greater input of resources from the Commission.
POLICY OPTION B	No impact since the Commission would not take any direct or indirect action on tourism.	A non-action response would not be proportionate to the nature of challenges facing European tourism.  External voluntary measures and schemes cannot be enough to prevent negative impacts.
POLICY OPTION C	Use of existing Community framework for sustainability without further specific involvement in tourism. No impact on subsidiarity: tourism initiatives would remain entirely with tourism stakeholders other than the Commission.	Fails to adequately tackle the specific challenges faced by the tourism sector that cannot be entirely addressed by the general Community framework for sustainable development.
POLICY OPTION D	It enables stakeholders to act at the appropriate level complementing their tasks with a facilitator and orientation role at Community level.	The challenges would be addressed in a more optimised way without further demanding additional resources to implement them.

**5. WHAT ARE THE IMPACTS – POSITIVE AND NEGATIVE – EXPECTED FROM THE DIFFERENT OPTIONS IDENTIFIED?**

Since the nature of the issues and of the options presented means that quantification of the impacts is not feasible, techniques such as cost-benefit analysis and cost-effectiveness analysis were not used. The assessment of the impacts was therefore carried out on the basis of a Multi-Criteria Analysis that made it possible to measure, at least in a qualitative sense, how well the options were expected to perform against each criterion. The selected criteria (see Table 4) were deemed complete, operational and satisfactory for the assessment of the policy options in a manner that permitted the impacts to be assessed without creating difficulties in assessing input data and making communication of the analysis more complex.

**TABLE 4 : CRITERIA FOR ANALYSING THE POLICY OPTIONS**

	<b>Criteria</b>
1 <sup>st</sup> group: Policy framework	Developing consumer awareness
	Achieving integration and coherence between policies and approaches
	Developing transparent multi-stakeholder processes
	Developing monitoring systems and information dissemination
2 <sup>nd</sup> group: Targeting consumption	Reducing seasonality
	Sufficient provision of infrastructure
	Increasing access to tourism for all citizens
	Promoting sustainable inter and intra destination mobility
3 <sup>rd</sup> group: Targeting enterprises	Availability of skilled, qualified staff for tourism sector
	Use of quality and environmental management tools
	Use of new information and communication technology
4 <sup>th</sup> group: Targeting destinations	Ensuring community well-being in destinations
	Respecting and maintaining the diversity of cultural heritage
	Respecting environmental carrying capacity

- **What are the expected positive and negative impacts of the options selected, particularly in terms of economic, social and environmental consequences, including impacts on management of risks? How large are the additional ('marginal') effects that can be attributed to the policy proposal, i.e. those effects over and above the "no policy change" scenario?**

In order to give a qualitative description of the way each option performs against each of the selected criteria/modes of action, the scale shown in Table 5 was devised to determine how the measures addressed the criteria.

**TABLE 5 SCALE FOR SCORING OPTIONS AGAINST CRITERIA**

++	Measure very likely to positively address the criterion
+	Measure likely to positively address the criterion
?	Impacts in relation to criterion uncertain or subject to existing/further policy measures

The Assessment Summary Table (AST) in Table 6 presents the impact information in a consistent and transparent manner that highlights the most important impacts of the selected options.

**TABLE 6 ASSESSMENT SUMMARY TABLE**

	<b>Option A</b>	<b>Option B</b>	<b>Option C</b>	<b>Option D</b>
Developing consumer awareness	Measures to raise consumer awareness under this Option are likely to be similar to those adopted under Option D, and are thus unlikely to generate additional benefits.	There is evidence of international guidance, action taken at national, regional and local levels, and industry initiatives to develop consumer awareness of sustainable tourism issues. These appear to have had some effect, as demonstrated by reported growth in responsible tourism. The range of information available to consumers, though, may limit the effectiveness of existing initiatives.	A number of existing Commission policies include elements of consumer education and awareness training. These cover general environmental and sustainability issues but do not relate specifically to sustainable tourism behaviour. This lack of specific focus may limit their scope to influence tourist behaviour beyond Option B.	Specific measures to raise consumer awareness (see measure 5) are likely to develop consumer awareness beyond the current level. Current consumer awareness is low, but slowly increasing. Option D may advance this trend, to achieve the associated benefits sooner.
	++	+	+	++
Achieving integration and coherence between policies and approaches	A comprehensive policy on tourism might reduce the potential for integration and coherence, as tourism aspects would be assumed to be addressed under the comprehensive policy.	Although advocated by high level guidance, integration does not appear to be widely addressed at national or international levels by voluntary initiatives. Instead, there is a range of separate, potentially competing, initiatives.	Broad policies integrate sustainability concerns across a range of sectors at a high level. Concrete actions taken at lower levels, however, remain separate.	Specifically focuses on enhancing integration and coherence of Community policies and actions by other stakeholders, which should achieve increased benefits.
	+	?	+	+ / ++
Developing transparent multi-stakeholder processes	A comprehensive policy for tourism could include specific measures to develop transparent, multi-stakeholder processes and could provide resources to support this process.	Where they exist, sustainable destination/tourism initiatives are often based on the Agenda 21 process, which encourages multi-stakeholder processes. However, the coverage of initiatives is incomplete.	A number of European initiatives promote the wider involvement of multi-stakeholder processes, which may be co-ordinated over a larger scale to share best practice. However, these processes may not always address issues of concern to tourism.	Specific measures to co-ordinate multi-stakeholder processes, focused on tourism issues, will greatly improve performance against this criterion.
	++	?/+	+	++
Developing monitoring systems and information dissemination	A comprehensive policy could include systems for monitoring and reporting on sustainability of the tourism sector, which would achieve similar benefits to Option D.	There is evidence of international guidance and action taken at national, regional and local levels to monitor tourism and disseminate good practice information. Different approaches between destinations may limit their effectiveness.	Many European initiatives advocate the development of monitoring systems and information dissemination. However, their relevance to the tourism sectors is likely to be limited. Therefore this Option does not perform any better than Option B.	Specific measures to monitor and report on the sustainability of the tourism sector, as well as to facilitate the use of management tools and the dissemination of information through a range of fora, presents a more co-ordinated approach across the EU. This will assist in meeting reporting obligations to the Commission on Sustainable Development.
	++	+	+	++

	<b>Option A</b>	<b>Option B</b>	<b>Option C</b>	<b>Option D</b>
Reducing seasonality	Measures to address seasonality, and thus the concentration of tourism, could be included under a comprehensive policy. However, underlying factors may limit their effectiveness in practice.	Little action has been taken by stakeholders to address the key challenge of reducing seasonality and thus the concentration of tourism. Where action has been taken, and results achieved, this is on a very small scale.	Possible measures under the Transport White Paper may reduce seasonality, but are unlikely to have a significant impact in view of the driving forces behind this trend.	Specific measures to address seasonality will improve on the Options B and C; however, the underlying forces of climate and lifestyle issues may limit progress in this area.
	+	?	?/+	+
Sufficient provision of infrastructure	A comprehensive policy could include specific measures to encourage sustainable destination management and to encourage the provision of adequate infrastructure.	High level guidance gives little consideration to infrastructure, and this is reflected in the lack of attention paid to it in stakeholder initiatives.	Some consideration is given to infrastructure by European initiatives, most significantly in terms of structural funds.	Sustainable destination management may address the adequate provision of infrastructure, but this is not explicitly stated.
	++	?	+	+ /+ +
Increasing access to tourism for all citizens	A comprehensive policy on sustainable tourism could include specific measures to address access to tourism for all citizens.	Although the number of tourists is increasing, this is probably due to reasons beyond the control of individual stakeholders. However, stakeholders can assist in making travel more accessible for disabled people. Although some initiatives exist, their uptake and effectiveness is low.	Initiatives relating to CSR, use of information technology, and cultural tourism may improve access to tourism for some people, particularly disabled people.	Focused, tourism-specific measures, such as sustainable destination management, may provide an incremental benefit compared to Option C.
	++	?	?/+	+
Promoting sustainable inter- and intra-destination mobility	Specific measures to promote sustainable inter- and intra-destination mobility could be introduced by a comprehensive policy. However, addressing the key challenges of the impacts of transport on global warming, air pollution and other environmental and social factors would need action by a wide range of stakeholders.	Little consideration is given to sustainable mobility beyond isolated projects. This is likely to go beyond the competencies of stakeholders alone, thus unsustainable trends are observed in private car and air transport, with potentially significant impacts, particularly in terms of global warming and air pollution.	The Transport White Paper provides a more coherent approach at the appropriate level. Its expected positive impact on sustainable mobility depends on its effective implementation and the adoption of consistent measures at national or local levels and has the potential to address the key impacts of tourism induced mobility.	More targeted measures will address the issue of passenger transport, but it is necessary to combine this with developing consumer awareness to ensure that the main impacts are addressed.
	++	?	+	+ /+ +
Increasing the availability of skilled, qualified staff for tourism sector	A comprehensive policy could include specific measures to address the availability of skilled, qualified staff.	There is some evidence of training for tourism employees but the reported trends suggest these initiatives are not sufficient.	The need for more qualified staff is addressed by a number of European initiatives, including some specifically for SMEs, but there is still little evidence that these are addressing the problem for the tourism sector.	Measures to improve sector competitiveness will address this issue out of necessity. However, the Commission's intentions are not yet clear, since it is likely that this will be addressed through an action plan.
	++	?/+	?/+	+

	<b>Option A</b>	<b>Option B</b>	<b>Option C</b>	<b>Option D</b>
Use of quality and environmental management systems	Measures to encourage the use of quality and environmental management systems in the sector could be included in a comprehensive policy. This could address the current problem of a range of overlapping initiatives.	A large number of eco-labelling and quality labelling schemes exist, based on management systems. However the variety of schemes may lead to confusion and limit their effectiveness.	The introduction of an EU eco-label for tourist accommodation in 2003 may reduce the confusion caused by the wide variety of existing schemes, but it is too soon to tell. EMAS is also widely applied (but not necessarily in tourism).	Integrated quality management at the destination level will encompass good quality and environmental management developed at the enterprise level. This will create a more integrated approach and enable the most significant environmental and quality issues at particular locations to be identified and addressed.
	++	+	?/++	++
Use of new information and communication technology	Promotion of new information and communication technology could form a specific measure under a comprehensive policy. However, it would need to ensure that the diverse nature and needs of tourism enterprises are addressed.	Although advocated by high level guidance, it does not appear to be widely adopted by tourism enterprises, especially SMEs.	A range of European policies and initiatives aim to facilitate greater use of new information and communication technology, including those targeted towards SMEs. However, impacts on the tourism sector have been limited to date	Measure 8 will ensure that this criterion is met, provided that attention is paid to the diverse range of tourism enterprises and their needs.
	++	?	+	++
Ensuring community well-being in destinations	A comprehensive policy could enable the adoption of measures to address the specific impacts of tourism on community well-being. However, the wide range of needs and impacts would need to be recognised.	Although advocated by all high level guidance, it does not appear to be widely practised at the destination level.	Promotion of CSR and consumer awareness may assist with progress towards this criterion, but it does not address specific-tourism-related issues, such as social discontent.	More targeted CSR, multi-stakeholder processes and sustainable destination management that involves local communities may assist in ensuring community well-being.
	++	?	?/+	+ /++
Respecting and maintaining the diversity of cultural heritage	Measures to address the threats of cultural erosion, and promote activities focused on cultural heritage, could be included within a comprehensive policy. However, the measures would need to address the wide range of issues and impacts and to work closely with local initiatives	Although advocated by high level guidance, it does not appear to be widely practised at the national level, illustrated by threats of cultural erosion through poorly-managed mass tourism to vulnerable communities. However, local activities tend to focus on cultural heritage.	Promotion of cultural issues by the Commission may improve upon Option B. However it may not be focused on vulnerable communities that risk losing their identity through poorly-managed tourism.	Measures to promote CSR and sustainable destination management will build on existing actions to maintain cultural heritage.
	+ /+++	?/+	+	+ /++
Respecting the environmental carrying capacity	A comprehensive policy could include measures to develop the concept of carrying capacity, under which the specific threats to locations are identified, together with management measures to address these. It is unlikely, though, that a uniform approach to managing carrying capacity across all destinations would be effective	Although advocated by all high level guidance, it does not appear to be widely practised at the national level, illustrated by threats of environmental destruction through mass tourism to vulnerable ecosystems. However, local activities tend to focus on environmental quality.	A large number of European policies and initiatives exist to limit environmental pollution and use of resources. However, these do not necessarily address all impacts at a destination level, where problems are likely to occur.	Building on existing actions to limit environmental impacts, the implementation of the carrying capacity concept under Measure 7 should ensure that this criterion is met. This would assist the identification of specific local impacts (which may be to air, water, land or local communities) and the development of measures to address them.
	++	?/+	+	++

### **Assessment of Option A): Comprehensive Genuine Community Policy**

No details exist as to how a comprehensive genuine Community policy on tourism would be adopted in practice. It can be assumed, however, that it may have the overall effect of integrating the currently dispersed direct and indirect Community actions. It could also be assumed that it would facilitate action towards addressing specific tourism-related challenges that may not be addressed elsewhere.

Option A could improve performance against criteria, where other options are potentially less comprehensive, through the adoption of specific measures to address particular challenges. Areas where this might be necessary include ensuring provision of sufficient infrastructure, increasing access to tourism for all citizens, promoting sustainable inter- and intra-destination mobility, increasing the availability of skilled staff, and ensuring community well-being in destinations.

In other areas, Option A) may perform less well than other options. For example, although Option A) could have an integrating effect on Community actions, it may potentially reduce coherence and integration between policies and approaches, as tourism aspects would be assumed to be addressed under the comprehensive policy and thus might be neglected under other policies. Areas of conflict, or 'grey areas', may arise where a comprehensive tourism policy required action beyond that specified by existing policies. Examples might include sustainable inter- and intra- destination mobility or environmental carrying capacity (e.g. land management or water resources).

There might also be difficulties in defining tourist destinations and activities subject to a comprehensive policy, whilst recognising the diversity of the sector. This may constrain stakeholder action and innovation in addressing local issues and/or the effectiveness of a tourism policy. Stakeholder action is essential for addressing challenges relating to environmental and social factors, for example ensuring community well-being, maintaining the cultural heritage and respecting the environmental carrying capacity of destinations, where local solutions are needed. However, the Bathing Water Directive provides an example where specific areas (i.e. bathing beaches) have to be designated, and a similar approach could potentially be adopted to define sustainable tourist destinations. Similarly, Natura 2000 sites require local authorities to manage part of their area differently, and in accordance with stricter requirements, from the remaining area. Adopting a tourism policy may provide greater support to addressing the challenges for both destinations and enterprises.

Option A) bears a particular risk of additional administrative burden on local authorities and enterprises (SMEs) that is not matched by its added value. Moreover, the challenges facing tourism are acute, and it is unlikely that a comprehensive policy can be adopted and implemented within a sufficient timeframe to ensure action in the short to medium term. In the longer term, and assuming that issues concerning the definition of the tourism sector and potential overlaps with other policies are effectively dealt with, a comprehensive policy may provide greater stability and recognition for the European tourism sector.

### **Assessment of Option B): Non-Action Scenario**

A non-action scenario relies exclusively on the existing initiatives and contributions that stakeholders other than the European Community undertake at various levels, ranging from international to local, and those that they might still develop. During the last decade, an increased stakeholder dialogue, in both the private and public sectors, has resulted in mainly voluntary initiatives to address and diminish social and environmental impacts, while

enhancing the economic benefits of tourism activities. These initiatives have taken various forms and represent all sectors of the travel and tourism industry.

Significant issues such as better governance, seasonal spread and sustainable transport are addressed only to a very limited degree by existing initiatives. They require a level of coordination and initiative that is difficult to achieve by many of these stakeholders, or they remain at too high level to have an effect on the ground. Initiatives undertaken by global organisations to encourage action by local stakeholders, for example the Tour Operators' Initiative and World Tourism Organisation guidance for tourism managers and local authorities, may be too far removed and general to encourage uptake by local stakeholders. While these initiatives deal to some extent with environmental and social issues, economic issues related to the quality of supply receive less consideration. This risks, in turn, prolonging the degradation of the environmental and cultural environment as the bulk of enterprises concentrate their efforts on attracting customers.

Past stakeholder initiatives to develop consumer awareness and promote the use of environmental management tools illustrate the problem of lack of efficiency due to a lack of coordination. 40 regional, national and international eco-labels for tourism have been developed at various levels in Europe, but their adoption by the industry is as yet limited. Tourists cannot know all of them, compare them, and assess their information value.

When focusing on one aspect of sustainability, uncoordinated initiatives bear potential for conflicts with other objectives. For example, a one-sided local action that aims to limit tourist numbers so as to respect the local carrying capacity may not be compatible with the social objective of favouring tourism for all, i.e. for of those with lower incomes, when combined with yield optimisation or raising additional revenue. It could also shift tourism to other destinations where it is not managed sustainably, increasing concentrations and thus exacerbating negative trends.

Whilst the effect of the many individual initiatives launched and provided for by stakeholders other than the European Community cannot be assessed in detail, it can be assumed that the current unsustainable trends highlight areas where Option B) would fail to address the objectives of the proposed Communication. Overall, relying on Option B) to deliver progress on sustainable tourism at the European level could increase uncertainty that the objectives would be met, since the relatively uncoordinated nature of existing, largely voluntary, initiatives means that they could end at any time and with no alternative approach in place.

### **Assessment of Option C): Relying on Established Contributions**

Option C) provides additional benefits to Option B) in those areas where a higher level, coordinated approach to address the issues more effectively can be achieved under established Community policies and measures. For example, the Transport White Paper provides a more coherent approach by promoting the overall concept of sustainable mobility. Consideration is given to the provision of infrastructure, as part of trans-European networks and through structural funds, and environmental protection is promoted through a large number of Community measures and legislation. For example, the introduction of an EU eco-label for tourism accommodation in 2003 may in due course provide added value as consumer awareness is improved.

However, many established Community measures appear too general to address the specific challenges of the tourism sector. Therefore, Option C) is limited in the extent to which it will effectively meet all of the criteria, particularly in the medium-term. For example, broad

policies integrate sustainability concerns across a range of sectors at a high level, but it is unlikely that this alone will facilitate the integration and coherence of policies and approaches at lower levels. Another key issue for the competitiveness of the tourism industry, and thus economic sustainability, is the availability of skilled and qualified staff. The effect of seasonal concentration or spread has a significant influence on this issue, in addition to the other factors affecting it. Thus measures to increase the skills of the European workforce in general are not sufficient in the tourism sector without addressing current seasonal concentration.

Option C) provides some additional economic, social and environmental benefits compared to Option B), but many of the existing initiatives and Community policies and measures are too broad for their impact on tourism to be assessed with any accuracy. Instead, they provide a coordinated approach to issues that would otherwise be addressed in isolation at the local level, for example transport. Option C) corresponds more or less to the current situation regarding Community involvement in the issue of tourism sustainability. The fact that, nevertheless, unsustainable trends in tourism do not change would suggest that this existing framework is not sufficient to make adequate progress in this field.

### **Assessment of Option D): Reinforcement of Existing Framework**

In reinforcing the existing framework (Option C), Option D) provides added value related to the majority of criteria. This results from a greater degree of coordination, increasing the effectiveness and efficiency of action and potentially achieving benefits faster and in a more targeted way by being adapted to the specific problems than might occur under the existing framework. A good example of this is consumer awareness. Despite some evidence of already increasing awareness and demand for responsible tourism, sustainable consumer behaviour is so vital to progress towards sustainable tourism that action taken under Option D) could advance this trend and provide benefits sooner than may otherwise be expected.

In this context, the promotion of sustainable tourism consumption and production patterns, and corresponding proactive best practice dissemination can be a core action of Community involvement for dealing with the major challenges affecting tourism. Option D makes it possible for the Commission to participate in specific measures for addressing these challenges, including that of seasonal spread. Such measures can provide considerable added value to efforts to reduce the unsustainable trend in tourism activity insofar as this trend is not driven by strong forces such as climate and lifestyle, which may be beyond the control of the Commission, irrespective of any policy option. It is, therefore, important that activities as those designed to address sustainable inter- and intra- destination mobility, are supported by measures to raise consumer awareness to ensure the best possible chance of improvements.

A reinforcement that aims to specifically address the sustainable development of tourist destinations can be expected to provide a wide range of significant economic, social and environmental benefits by supporting industry, the local community and the environment. It would assist the identification of specific local impacts (which may be on air, water, land or local communities) that may not be sufficiently or specifically addressed by stakeholder initiatives or existing Community policies (under Options B) or C). In this way, Option D provides the flexibility to address the regional diversity of the tourism sector and enables individual solutions to be found for destination challenges. It adds clear value, not only for sustainability in the tourism sector, but in general.

The provision of sufficient infrastructure (such as transport networks, waste management and water treatment facilities), the availability of skilled, qualified staff, respecting and maintaining the diversity of cultural heritage and increasing access to tourism for all citizens



are the criteria least improved by Option D). This reflects an emphasis on operational aspects, such as better governance, and environmental aspects of sustainability rather than the socio-economic aspects. However, again, this option has the potential to better fine-tune non sector-specific Community policy measures in the above-mentioned fields, so that they become more effective for the tourism sector, and through this in general in the areas where sustainability problems are biggest. Given the significance of the current situation regarding the availability of skilled and qualified staff, further specific measures to address this shortage and improve working conditions can substantially improve the value of this option and its likelihood of achieving progress towards sustainable tourism.

Better coordination and use of the different Community policies and measures affecting tourism, an enhancement of this effect, and stakeholder participation when assessing their impact, is particularly important potential of this option. It will be crucial in optimising the benefits of Community action in general on tourism sustainability. It will also foster governance at all levels and facilitate integration and coherence between policy areas, ensuring that the views of, and impacts on, SMEs are properly addressed in this process.

The Communication also points out the need to encourage stakeholder synergies and cooperation among stakeholders. Option D) provides the opportunity for enhancing cooperation with other major players in the field of tourism sustainability. Likewise, it makes it possible to set up a multi-stakeholder group that steers the actions that the various stakeholders concerned undertake for achieving further progress towards the sustainability of European tourism, and monitors this progress. Both steps can be seen as an important move towards supplementing the commitments to be included in a European sustainable tourism agenda (a future Agenda 21 for European Tourism), and the transposition into Europe of the tourism-relevant parts of the Plan of Implementation adopted at 2002 World Summit on Sustainable Development.

- **Are there potential conflicts and inconsistencies between economic, social and environmental impacts that may lead to trade-offs and related policy decisions?**

Given that all the options aim to address the same challenges, all of them experience the same potential areas of conflict, but to a different degree. A substantial issue is ensuring that tourism is accessible to everyone, whilst protecting the cultural and environmental resources of destinations. Likewise, provision of infrastructure may conflict with environmental objectives. However, because of its very nature, i.e. depending on good environmental conditions and an active social contribution, tourism can only be economically successful when respecting the two other aspects of sustainability.

None of the options considered is based on the assumption of restricting tourism growth: rather the aim is to manage it with sustainable effect. Option D) makes it possible for the Commission to participate in specific measures for addressing the issues of seasonal spread and carrying capacity, which are vital in reducing negative social and economic impacts of tourism growth, while at the same time strengthening a bottom-up approach and the key responsibility of local and industry stakeholders. Therefore, this option is also most likely to minimise conflict between economic, environmental and social impacts in the shortest possible term and in the most targeted and effective way. Nevertheless, it remains fully compatible with the existing Community policy framework regarding related policy fields.

- **Are there especially severe impacts on a particular social group, economic sector (including size-class of enterprises) or region?**

The analysis suggests that there are three specific categories that may be particularly affected:

*A) Small and Medium-sized Enterprises*

SMEs as a specific group is dominant in the tourism sector. They may currently lag behind larger companies in terms of their use of new technology and communication and may experience greater staffing problems as well as paying less attention to the environmental and social impacts of their activities. All these factors may reduce the quality of the service offered and thus their competitiveness. However, the increasing market for cultural and natural tourism provides a good market opportunity for SMEs, where tourists are likely to favour small, locally-run enterprises over the larger, global brands. The policy approach selected will have the potential in particular to assist SMEs in meeting consumer demand for quality.

*B) Local communities and peripheral regions*

Local communities as tourist destinations are significantly affected by tourism activities. Although tourism provides economic benefits, social discontent may arise from so-called mass tourism, especially where this may not sufficiently respect local cultures. The policy option selected is particularly well placed to avoid current trends exacerbating these issues through measures to address sustainable destination development and management. It facilitates an improved social environment for local communities, particularly through multi-stakeholder processes involving communities to a greater extent than at present.

Measures to manage tourism patterns, and particularly transport options, may disproportionately affect peripheral regions, above all islands. Their tourism business largely depends on air travel and benefits significantly from the increase in cheaper air travel that do not internalise environmental costs. Thus any measures that would result in discouraging or limiting air travel is likely to impact heavily on the tourism economy of peripheral regions. This example emphasises the need for a flexible approach which recognises the diversity of the European tourism industry.

*C) Disabled people*

Current levels of accessible tourist facilities restrict the potential for travel of the 10% of the population of the EU who are disabled. Under the selected policy option, greater consideration of corporate social responsibility, and actions to improve access, can address this issue.

- **Are there impacts outside the Union on the Candidate Countries and/or other countries (“external impacts”)?**

Measures to be taken with regard to the sustainability of European tourism are intended to bring equal benefits across Europe and, as far as possible, world-wide. The policy option selected was, among other reasons, chosen because of its capacity to allow optimal adaptation of concrete measures to the specific geographical conditions, including those above and beyond the current EU of 15 Member States. Overall, there are no negative external impacts expected from these measures.

However, managing tourist patterns may result in certain geographical shifts in tourism. It might be that, at least temporarily, for price reasons or because of not wanting to change patterns, a part of the market will favour tourism activities at places that do not address sustainability issues, thus increasing pressures on vulnerable destinations and fragile resources, including those outside the EU. It is not possible to assess the degree to which this might occur. On the other hand, the fear may exist that more sustainable tourism consumption patterns might mean Europeans travelling less to non-EU and distant destinations. Those locally responsible for these destinations need to recognise the fact that tourism which is viable and sustainable in the long-term cannot depend excessively on long-haul tourists, as is currently the case for many of the non-European destinations that have recently emerged. Some of the more-advanced developing countries have therefore started to pay particular attention to neighbouring and domestic tourism markets. Even the least-developed countries have an interest in gradually doing the same.

- **What are the impacts over time? What are the results of any scenario, risk or sensitivity analysis undertaken?**

Certainly, European tourism needs time to achieve sustainability. Nevertheless, the objective is that progress in this field is, in the medium-term, bigger than the quantitative growth in the sector, according to the scenario for the future of tourism, and its sustainability, as summarised in Annex 1 of the Communication; this objective is also known as "decoupling".

One reason why existing initiatives may currently be unsuccessful is that many have been implemented relatively recently and may not yet have reached their full potential. Thus, over time, relying on them could prove to be more effective than today. However, it is unlikely that, even in the long term, issues of better governance, seasonal spread, sustainable transport, etc., can or will be addressed by individual stakeholders. Likewise, many of the Community policies and measures addressing sustainability issues are relatively new and thus greater benefits may arise from these actions at some time in the future, the tourism sector being no exception.

However, given the scenario for the future of tourism, and its sustainability, there is no time to lose. Thus, one of the major reasons for selecting the policy option of tourism-specific reinforcement and best use of the existing framework for action was that this is the best way to provide benefits sooner than may be expected from the other options that were considered, with effects increasing over time. The desired achievements can also serve as a sector-specific contribution to the programme in support of European initiatives to accelerate the shift towards sustainable consumption and production, as provided for in the Plan of Implementation adopted at the Johannesburg World Summit on Sustainable Development.

## 6. HOW TO MONITOR AND EVALUATE THE RESULTS AND THE IMPACT OF THE PROPOSAL AFTER IMPLEMENTATION?

### • How will the policy be implemented?

On the basis of the policy option selected, the Communication foresees a general concept of future action for implementation ranging from global to local, both in the international context and within Europe, in order to address the need for sustainable consumption patterns and sustainable tourism production. According to their different level of responsibilities, the need for local stakeholders to formulate their own Agenda 21 at the territorial or sub-sector levels has been stressed.

The selected policy option sets out the framework for delivering, on the basis of a multi-stakeholder voluntary process, specific hints and guidelines. A high degree of commitment from bodies representing the tourism industry, national/regional/local authorities and civil society groups must be developed in order for the process to start and be implemented at the various territorial levels.

Thus, implementation will be based above all on the initiatives of directly responsible and specialised stakeholders and on activities under those Community policies and measures which affect European tourism. To ensure that these initiatives and activities for European tourism are effective as possible, the Communication proposes to put into concrete form the further European Community contribution to implementing tourism sustainability in the international context and within Europe through a number of provisions.

The implementation of this general concept of future action by the European Community needs to take into account the fact that the level of tourism activity and the dependence on tourism vary across Europe's vast and diverse territory, as do the intensity and specific nature of challenges for the tourism industry and for sustainability. This great diversity of European tourism, the principle of subsidiarity and the lack of a specific competence mean that the European Community itself can only undertake guidance and complementary activities and further the practical application of the sustainable tourism concept.

More concretely, implementation will mean further action in the following areas:

- a) *Working arrangements fostering the contribution of Community policies to the sustainability of European tourism.*

The Communication highlights the role of the Impact assessment as an instrument to aid the integration of sustainability concerns into related Community policies with an impact on tourism. As acknowledged in the Commission Internal Guidelines on the IA procedure, in undertaking an extended impact assessment a wide range of possible economic, environmental and social impacts should be considered as well as identifying who is affected and when the different impacts will occur. Thus, any policy should be assessed in terms of its economic, environmental and social impact on tourism policies.

Furthermore, it is proposed to prepare and implement a Commission internal work programme for enhancing the effect of the various community policies concerning European tourism in supporting the sustainability of the sector. This work programme should be the result of an open coordination process and will emphasise policies and measures aimed at meeting the challenges of sustainable tourism supply. A guide addressed to tourism stakeholders on support for sustainable tourism is planned as additional aid.

b) *Encouraging stakeholder synergies and cooperation.*

One element is a cooperation agreement with the World Tourism Organisation in the field of sustainable tourism.

The second, crucial element is launching a *Tourism Sustainability Group*. Its first task will be to allocate specific activities and responsibilities to the various tourism stakeholders, and to steer, monitor and evaluate the implementation of the agreement(see below).

c) *Promotion of sustainable tourism consumption and production, and the better transfer of approaches, initiatives, instruments and good practice to the players on the ground.*

Ad-hoc multi-stakeholder targeted actions are planned to raise awareness, appraise the evolution of the identified major challenges and provide tailor-made tools and guidance. They will focus on tourism consumption patterns (tourists as responsible consumers), on good governance and the CSR practices of tourism sector enterprises, on sustainable tourist destination development and management, and on information tools and networks in support of the other measures.

In some cases, such as the promotion of governance principles and sustainable tourist destination development and management, the Commission will further work through already existing instruments (such as the European Multi-stakeholder Forum on Corporate Social Responsibility) and explore the feasibility of target-based tripartite agreements.

It is planned to begin the gradual implementation of the measures adopted in 2004, in cooperation with the Council, the other Community Institutions and with international bodies active in this field, as well as with the active participation of the tourism industry and civil society representatives. Furthermore, the Commission will report back to the Council and the other Community Institutions in the autumn of 2005 on the progress of implementation, in a sufficiently detailed manner for an Agenda 21 for European tourism to be drafted no later than 2007.

• **How will the policy be monitored?**

Monitoring and evaluation of these instruments is an essential part of the policy itself, and these tasks will be performed as part of the work of the above-mentioned *Tourism Sustainability Group*. The group will be asked to set up and manage a "European-level system to monitor the sustainability of the tourism sector", delivering an annual report to measure the progress achieved.

This instrument is intended to monitor progress over time and to ensure the overall consistency both of EU policy and instruments and of national policies and will feed back into the policy decision-making process at the right level. With a view to monitoring and reporting sustainable tourism and providing a tool to fulfil Community commitments undertaken in the international context, the Commission will continue, together with other public and private stakeholders, the work undertaken in the field of sustainable tourism indicators.

The group can also guide the use of the Local Agenda 21 tool in tourist destinations and the preparation of a model for local destination monitoring and indicator systems to ensure that destinations make use of the same principles of monitoring and deliver comparable results. It can also encourage the bottom-up development of tools and good examples of tourism sustainability adapted to local conditions.

- **What are the arrangements for any *ex-post* evaluation of the policy?**

Since these "Basic ORIENTATIONS for the sustainability of European tourism" are the Commission's input at this stage to a broad Agenda 21 process for sustainable European tourism which is open-ended, no specific *ex-post* evaluation is foreseen. The process will continue and evaluation is expected to take place within regular monitoring of these instruments. The *Tourism Sustainability Group* will be responsible for regularly evaluating implementation of the measures provided for in the action framework.

## 7. STAKEHOLDER CONSULTATION

- **Which interested parties were consulted, at what point in the process, and for what purpose?**

The Commission started drafting the document on the basis of the results of a working group to promote environmental protection and sustainable development in tourism<sup>16</sup>. The purpose was to speed up the development of Agenda 21 in Europe with the guidance provided by an external steering group<sup>17</sup>, under the chairmanship of the Commission, composed of experts from international bodies, national administrations and other tourism stakeholder groups, including environmental NGOs.

During the process of implementation of this measure it emerged that the European Agenda 21 for Tourism required a step-by-step process where the Commission would mainly play a facilitator role and the prime responsibility would be based at the level of other stakeholders. The Commission has regularly reported on the results of the work undertaken with the help of this steering group to all interested European stakeholders.

In April 2003, the Commission service responsible for the work finalised a document for public consultation, which was based on the work done so far and developed the policy options, the approach, and the possible measures and other considerations discussed above and now to be found in the Communication.

Between 25 April and 31 July, the Commission invited all interested parties to actively examine, contribute to and submit their comments on the consultation document. In so doing, they could also refer to any other relevant document, whether mentioned in the document or not, and comment on it. European citizens and tourists, private sector enterprises, European tourist destinations and public authorities, and civil society stakeholders were called upon to deliver their views regarding the policy options, the concept of action and the Community contribution, the measures that the Commission could envisage, and the vision of what other stakeholders should do.

From the Internet open consultation, the Commission received reactions from a total of nearly 100 organisations and individuals. The outcome of that consultation and the summary of comments received are appended to this document. All reactions can be consulted on the site <http://europa.eu.int/comm/enterprise/services/tourism/consultation/index.htm>. In addition, the European Commission actively identified and asked for comments from its usual interlocutors in regular consultations with tourism stakeholders, in particular representatives of national administrations responsible for tourism policy, at a meeting of the Advisory Committee on Tourism in early September 2003.

An Inter-Departmental Steering Group<sup>18</sup>, set up to oversee the preparation and running of the Extended Impact Assessment, provided an opportunity to facilitate and smooth the task of assessing the impacts of the Commission Communication with the assistance of relevant Commission services.

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<sup>16</sup> Commission Communication to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions - Working together for the future of European tourism. COM/2001/0665.

<sup>17</sup> The Steering Group on Agenda 21 met six times.

<sup>18</sup> The ISG on the EIA on the Communication met three times.

- **What feedback on the comments received was provided?**

The Commission took account of the majority of comments received (see appendix). However, some of them largely went beyond the scope of the subject matter, targeting general or global sustainability issues, or they represented obviously an extreme minority view, so that a feed back was not possible or not appropriate in this context. A number of comments also resulted from the fact that messages put into the document had not been well understood, although they corresponded to the concerns expressed in the comment.

Generally, the language of the document was improved to make better readable for end-users and to avoid biased terms and expressions. The Commission acknowledges that there are many models for achieving sustainable tourism development. Therefore, it also continues an approach that targets as many stakeholders as possible, favouring consensus-building.

With regard to the challenges, views and objectives formulated in the consultation document, the comments confirmed the need to recognise that tourism and its sustainability is primarily consumer driven. Moreover, the Communication now more clearly acknowledges that economic success is essential for achieving sustainability. The consultation also resulted in a reinforced recognition of the territorial (land use) dimension, and of issues linked to climate change, for sustainable tourism. On the other hand, it added evidence to the fact that certain issues of tourism sustainability can hardly be dealt with. Although, to some extent, seasonal spread is one of them, the Commission does not follow the minority position that this is a minor challenge or should not be considered in a European context.

In the light of little success of voluntary instruments developed for sustainable tourism, which was recorded as state of the art, some comments asked for regulatory instruments. This idea was not specifically taken on board, although in exceptional cases regulation cannot be principally excluded, if it is part of a recognised Community policy. A number of comments referred to insufficient co-ordination and integration of the various existing Community policies affecting tourism sustainability. In particular, unconditional liberalisation was seen as not appropriate. These comments resulted in expressing, in a clearer way that leaves no doubts, the Commission's position and intention in this respect in the Communication, and to be more cautious with certain statements, e.g. that relating to the current benefits of the Euro-Mediterranean Partnership.

Regarding the policy options, some comments doubted the evidence provided with regard to them, and questioned whether some of them are valid to be considered or allow a neutral choice. There was a minority view that the Community should not at all or not specifically deal with tourism issues and/or sustainability in relation to tourism. On the other end of opinion, comments continued to ask for a fully-fledged Community tourism policy. However, the overwhelming majority supported the policy option taken-up in the Communication, and that also was confirmed by the Extended Impact Assessment.

A number of comments wanted the conception of action and the Community contribution being extended. Most of them required, in one form or another, specific Community funding for sustainable tourism or measures that would need considerable financial commitment. The Communication does not give follow-up to these requests. Certain comments asked for focusing, in a few cases exclusively, on the entrepreneurial aspect and/or a co-ordination role. Whereas the Communication provides for reinforced integration of sustainability concerns into Community policies and initiatives affecting European tourism, and for enhancing their effect on European tourism in order to support the sustainability of the sector, it also follows the line of dealing with all aspects of sustainability, and not only the entrepreneurial ones.



The measures that the Commission could envisage were the subject of the biggest proportion of comments. Partly, it was criticised that they were not sufficiently precise. Although the approach followed for these basic orientations is that measures will be gradually shaped during the process still to follow, the Communication tries to be as concrete as possible with regard to them. However, all together, the comments very much supported the suggested measures, and added further details or precision that could be taken on board.

The most controversial measure was that regarding a ‘European Multi-Stakeholder Monitoring and Steering Group for Tourism Sustainability’. In addition to the requests of making the denomination and description of this group easier to understand and clearer, its usefulness was questioned, whereas other comments confirmed that such a group, with the mandate that had been roughly indicated, is key to any other measure and to the success of efforts. While it was strongly supported that local and regional authorities must also be represented in this group, strong opposition arose against it being led by the tourism industry. Even the tourism industry itself largely seems not to want this. The Communication continues to see the creation and work of this group being a crucial measure, but takes account of the other comments with regard to it. It also largely integrates the comments with regard to the other measures, but leaves it to the process still to follow, how they will be shaped and implemented in detail.

Finally, regarding what other stakeholders should do, a number of detailed comments requested to include further stakeholder groups, and to put even more emphasis on consumers, including the importance of education in this respect. The role of those stakeholders that operate on the ground was particularly emphasised, whereas the importance of international stakeholders was seen with some reservation. This chapter also gave rise to continuing some controversial debate known from other occasions, such as with regard to so-called mass tourism and the market dominance of big tour operators, and the polemic concerning environmental taxes, in particular at tourist destinations. For the major part these comments were used to enrich, to revise and to fine-tune this chapter.

## **8. COMMISSION DRAFT PROPOSAL AND JUSTIFICATION**

### **• What is the final policy choice and why?**

The final Community policy choice made for these 'Basic orientations for the sustainability of European tourism', which are an important input to a broad Agenda 21 process for sustainable European tourism, is to reinforce the existing framework for action and to use it to the best advantage. In practical terms this policy will rely on:

- effective implementation of existing initiatives and reinforced efforts of stakeholders, other than the Community, who are active in this field; and
- activities of the Community, of which there are two basic types:
  - optimising the effect of Community policies and measures on the sustainability of European tourism, and
  - the definition and implementation of complementary tourism-specific action to promote sustainability throughout the Community, which particularly target support of and involvement in other stakeholders' initiatives and which fill gaps left by the Community policies and measures affecting tourism.

This cooperative and pro-active multi-stakeholder approach aims to bridge the remoteness of the Community from the players on the ground as the right road to sustainability for European tourism. It is expected to address the challenges that need to be tackled to ensure tourism sustainability alongside the current benefits that tourism can bring. Given the cross-sector nature of tourism, areas such as employment, regional development, environment, consumer protection, health, safety, transport, taxation and culture will be touched upon.

### **• Why was a more/less ambitious option not chosen?**

In the current situation, a reinforced framework for action provides a feasible, and the most appropriate, approach with regard to the principles of proportionality and subsidiarity. It is capable of dealing with the objectives and challenges identified in a suitable manner by means of an integrated approach within the European Union and in closer cooperation with all stakeholders.

A more ambitious option, i.e. a comprehensive approach as part of a genuine Community policy, risks not corresponding sufficiently to the diversity of the sector and involving an administrative burden on local authorities and enterprises (particularly SMEs) that is not matched by added value. This may constrain stakeholder action and innovation in addressing local issues and/or the effectiveness of a tourism policy. Moreover, the challenges facing tourism are acute, and it is unlikely that a comprehensive policy can be adopted and implemented within a sufficient timeframe to ensure action in the short to medium term, in particular because of the need for the agreement of all Member States.

A less ambitious option, i.e. the total renunciation of Community activities or only relying on established contributions, would correspond more or less to the current situation. This would fail to provide the specific Community contribution needed to trigger sufficient changes in favour of the sustainability of European tourism and to address the objectives of this Communication, and is therefore to be ruled out.

- **What are the trade-offs associated with the option chosen?**

There are no trade-offs associated with the option chosen. It is fully compatible with the existing Community policy framework regarding related policy fields.

- **If current data or knowledge are of poor quality, why should a decision be taken now rather than be put off until better information is available?**

Currently existing limited data and knowledge of the tourism sector hinder an accurate quantitative analysis of the impact of tourism. However, despite this weakness, the perceived economic, social and environmental sustainability issues and problems of European tourism, which are both linked to its current consumption and production patterns, and to its further quantitative growth, suggest continuing unsustainable trends of the sector. They show the need to take a decision now on the basic orientations to follow and on initial measures to be launched, and not to put the decision off until better information is available.

The Commission Communication 'Working together for the future of European tourism' identified the need for further work on improving tourism information, communication and statistics on tourism. The Commission has already started to mobilise existing competence and support centres for the development of knowledge and observation regarding tourism, in order to increase the availability of the necessary knowledge and tools for all stakeholders.

Likewise, the Commission has taken the necessary steps, in coordination with the public and private stakeholders concerned and with their support, to introduce Tourism Satellite Accounts (TSAs) in order to improve current statistical information as it exists in Europe (regarded as insufficient from both the qualitative and the quantitative points of view) and to fully reflect the impact and economic importance of tourism as an economic sector.

- **Have any accompanying measures to maximise positive impacts and minimise negative impacts been taken?**

At the current stage, it is too early to launch additional or accompanying measures to further increase the positive impacts of the policy option chosen. The plan is for them to be defined by the proposed *Tourism Sustainability Group* and implemented through the planned Commission internal work programme for enhancing the effect of the various Community policies and measures affecting European tourism to support its sustainability.

No negative impacts were identified.

**OUTCOME OF THE INTERNET BASED PUBLIC CONSULTATION**

(25 APRIL - 31 JULY 2003)

**1. International, European & transnational stakeholder bodies and initiatives**

- WTO (World Tourism Organisation).
- WTTC (World Travel & Tourism Council)
- ETC (European Travel Commission)
- ETAG (European Travel & Action Group)
- NET (Network of European private Entrepreneurs in the Tourism Sector)
- ECATRA (European Car & Truck Rental Association)
- ECTAA (Group of National Travel Agents and Tour Operators' association within the EU)
- EFCO & HPA (European Federation of Campingsite Organisations and Holiday Park Associations)
- ETOA (European Tour Operators Association)
- EUFED (European Union Federation of Youth Hostel Association)
- HOTREC (Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in the European Union and European Economic Area)
- IFTO (International Federation of Tour Operators)
- INSULEUR (Network of the Insular Chambers of Commerce and Industry of the European Union)
- EAPME (European Association of Craft, Small and Medium-sized Enterprises)
- ETLC (European Trade Union Liaison Committee on Tourism) / EFFAT (European Federation of Food, Agriculture and Tourism Trade Unions)
- EUTO (European Union of Tourist Officers)
- AEBR (Association of European Border Regions)
- AEM (Association Européenne des élus de Montagne)
- CRPM- Conference of Peripheral Maritime Regions of Europe
- ICLEI (International Council for Local Environmental Initiatives)
- IFN (International Friends of Nature)
- EUROPA NOSTRA, two individual reactions
- Green Globe 21
- eCLAT (Virtual network of researchers on climate change, environment and tourism)
- ECOCLUB S.A. - International Ecotourism Club

- ECOSERT Project Partnership - European Cooperation to achieve Sustainable Environmental Regional development through Tourism
- ECOTRANS e.V. - European network of experts and organisations in Tourism, Environment and Regional Development
- NEWtours - Network of excellence for sustainable tourism and transport
- Tourism-Site - Information network for sustainable development of tourist destinations
- Arc Latin - Arco Latino (59 NUTS III municipalities across the Mediterranean coastline)
- MIO-ECSDE. Mediterranean Information Office for Environment, Culture and Sustainable Development
- SMART - Sustainable Model for Arctic Regional Tourism (Project partnership consortium)
- SUT-Governance (EC R&D FP5 project, co-ordinator: Institute for Technology Assessment and System Analysis, Karlsruhe Research Centre)

## **2. National tourism administrations and authorities, and national agencies**

- Secrétariat d'Etat du Tourisme, France
- BMWA (Bundenministerium für Wirtschaft und Arbeit), Austria.
- Ministry of Trade and Industry, Finland
- Turistdelegationen (Swedish Tourist Authority)
- State Secretariat in charge of tourism, Hungary
- Det Kongelige Nærings- og Handelsdepartement, Norway
- Bundesamt für Naturschutz (German Federal Agency for Nature Conservation)
- Umweltbundesamt (German Federal Environmental Agency)

## **3. Regional and local authorities, tourism offices and development bodies**

- Agence Développement Local, Ville de Durbuy (Belgium)
- Ulm/Neu-Ulm Tourismuszentrale -Tourism office (Baden-Württemberg/Bayern, Germany)
- Municipality of Tengen (Baden-Württemberg, Germany)
- Agencia Valenciana del Turisme (Spain)
- Canary Islands' Tourism Observatory (Spain)
- Municipality of Calvià (Balearic Islands, Spain)
- Municipality of Girona (Catalunya, Spain)
- Municipality of Lloret de Mar (Catalunya, Spain)
- CESR (Economic and Social Council) Aquitaine (France)
- CESR (Economic and Social Council) Bourgogne (France)
- Coordinamento delle Regioni per le politiche del Turismo italiano (Italy)
- Région Autonome de la Vallée d'Aoste (Italy)
- Regione Sicilia (Italy)

- Provinces Noord Brabant, Limburg and Zeeland (The Netherlands)
- Mikkeli District Tourist Service (Finland)
- LGA/LGIB - Local Government Association / Local Government International Bureau (UK)
- Welsh Tourist Board and the Welsh Local Government Association (United Kingdom)
- South West England – Regional Sustainable Tourism Group (United Kingdom)
- Cornwall Tourist Board (United Kingdom)
- Kent County. Tourism Office (United Kingdom)
- Birmingham Tourism Office (United Kingdom)
- Prague City Development Authority (Czech Republic)

#### **4. National and local associations, unions and bodies**

- Nationalparkamt Müritz (Germany)
- WWF-Greece
- ALEFPA- Association Laïque pour l'Éducation, la Formation, la Prévention et l'Autonomie (France)
- FNE - France, Nature, Environment (France).
- CONFCOMMERCIO (The Italian General Confederation of Trade, Tourism, Services and SMEs) & CONFATURISMO (Italian representative of the tourist sector).
- Vereniging OSO - Organisations for Open Air Recreation (Netherlands)
- Austrian Federal Economic Chamber, Tourism and Leisure Industries Division (Austria)
- Service Union United (Finland)
- Coventry and Warwickshire Chamber of Commerce (United Kingdom)
- Church of England National Rural Office (United Kingdom)
- Church Heritage Forum, Archbishops' Council (United Kingdom)
- Sustrans - Sustainable Transport Charity (United Kingdom)

#### **5. National and local networks**

- Finnish University Network for Tourism Studies. Research and Training Institute (Finland).
- EHTF - English Historic Towns Forum (United Kingdom)
- Scottish Tourism and Environment Forum (United Kingdom)
- Cornwall Sustainable Tourism Project (United Kingdom)

#### **6. Enterprises**

- B.A.U.M Consult and Knowledge Networking (Germany)
- Stattreisen (Germany)
- Accor Group (France)

- Michelin (France)
- Vivacances (France)
- Gheanet Tourism Consultants (Italy)
- Turismo Mediterraneo s.r.l. (Sardegna, Italy)
- Rachel Dodds - Sustainable/Eco Tourism and Tourism Marketing Consultant (United Kingdom).

## **7. Research & education**

- Universidad de Málaga (Spain)
- CSST - Centre for Sustainable Tourism and Transport & NHTV - Breda University of International Education (The Netherlands).
- London Metropolitan University, International Institute for Culture, Tourism and Development (United Kingdom).
- University of Brighton, Centre for Tourism Policy Studies (United Kingdom), two individual reactions.
- University of the West of England, Centre for Environment & Planning-Bristol (United Kingdom).
- Centre for Responsible and Sustainable Tourism Development (Serbia).
- Márcia Cambraia Belderrain, University of São Paulo (Brazil)

## SUMMARY OF COMMENTS FROM THE INTERNET BASED PUBLIC CONSULTATION

The reference of this summary is the document published for public consultation on the Internet ([http://europa.eu.int/comm/enterprise/services/tourism/consultation/cons\\_en.pdf](http://europa.eu.int/comm/enterprise/services/tourism/consultation/cons_en.pdf)). The summary lists those comments that demand added or improved formulations in relation to the consultation document, or disagree or request deletion. Comments made by different organisations and individual may contradict each other. Details can be accessed via <http://europa.eu.int/comm/enterprise/services/tourism/consultation/index.htm>.

### **1. General remarks:**

#### Add / improve

- Sustainable tourism development guidance must be communicated in plain language targeted on end-users. The font size and layout should make the end-user want to read the text.
- Figures and percentages should indicate source data.
- Acknowledge that there are many models for achieving sustainable tourism development.
- Refer only to things that affect the tourism sector over which the sector (public and private operators) has a great deal of or at least some direct influence (therefore exclude areas such as strategic infrastructure and transport).
- To tackle sustainability problems with regard to tourism we need global environmental governance as a proactive mix of policy (transport, energy and environment), awareness raising amongst consumers and other stakeholders and corporate responsibility of the tourism industry. An effective policy can only be arrived at if we try to influence the major driving forces.
- Pay more attention to the social dimension of sustainability: CSR and the social dialogue merit further emphasis.
- A public and formal commitment from all stakeholders would help the implementation of sustainable tourism a great deal.
- Sustainable tourism demands real leadership, rather than management. Abandon the idea of pleasing all stakeholders ('citizens are the basis of power in a democratic society, stakeholders are the basis in an oligarchy').
- Define the timing, budgetary and technical means for implementing the objectives and measures selected and set priorities according to annual exercises.

### **2. Analysis of the challenges, views and objectives**

#### Add / improve

- The governance dimension should be added to the three classical pillars of sustainability (the institutional dimension).
- Link all the challenges to the appropriate territorial policy level to provide for a flexible approach.



- Stress that economic growth is fundamental for mainstreaming sustainable policies in tourism.
- Recognise that tourism is consumer-driven and not production-led. Put the emphasis on changing attitudes and demand patterns, as well as on implementation at local level.
- Sustainable tourist behaviour cannot be divorced from ‘sustainable consumer behaviour’. Local inhabitants have a crucial role in leading consumers/tourists by example.
- Regarding the supply chain, sustainability cannot rely on voluntary measures only (such as schemes and CSR). Legislation should not be discarded.
- Accept that tourism can be a driver for other economic sectors in order to mitigate current over-dependence on tourism in fragile areas (e.g. islands).
- Security (e.g. terrorist threat) and safety issues (both linked to natural risks or human caused risks) are also major challenges for European tourism.
- Preserving European cultural heritage diversity is a challenge for future European tourism.
- Pay more attention to land use, water and transport as the main threats for sustainability.
- Learn from the ECOPROFIT project regarding a European Programme on Sustainable Tourism and from the PEER project (Partnerships for Extended Entrepreneurial Responsibility in the Tourism Sector) regarding the issue of sustainability reporting of European Tourist destinations.
- Use the WTO definition of a local tourist destination.
- Eliminate doubts regarding the compatibility between cost internalisation and decoupling economic growth from social and environmental costs.
- CSR for the hospitality sector should not be planned, carried out and assessed by a single tourism stakeholder.
- Replace references to ‘adequate employment’ with ‘quality employment’.
- Replace the term ‘handicapped’ with ‘disabled’.
- Explain that a fundamental part of the ‘well-being of tourist destinations’ is the need to share profits with source market operators.
- Choice of destination is ‘discretionary’ rather than ‘arbitrary’.

#### Disagree / delete

- Avoid negative considerations such as ‘narrow economic imperatives’ that do not favour the mutual respect and understanding of the three sustainability pillars.
- If seasonality is a regional aim, then it should be coped with at that level.
- Seasonality is not one of the major challenges, since it is in many cases a natural phenomenon with which many destinations have learnt to live. The real problem is the ‘intra-seasonal fluctuations’ in visitor numbers that put uneven pressure on tourism systems and resources.
- Do not put the onus on production, but rather recognise and manage the pressures that create the demand and lead to seasonality (cultural preferences, employment patterns, annual holiday and public holiday restrictions, academic requirements, etc...).

- Assess the difficulty most European consumers have in developing sustainable consumption patterns due to the lack of transparency in an increasing vertically-integrated market.
- Acknowledge that climate change is a challenge (tourism is responsible for 10% of world-wide greenhouse gases and it is also suffering from climate change effects (high temperatures, water quality and shortages, etc.)).
- Do not assume automatically that cultural or heritage-oriented tourism is more 'sustainable' than other forms of tourism: treating culture/heritage as a 'tourism product' detaches culture from its local context and divorces it from its role in the maintenance and development of civil society.

### **3. Analysis of the state of the art**

#### **3.1 Initiatives and contributions of a wide range of stakeholders**

##### Add / improve

- Consider that all initiatives and contributions that have not succeeded are of voluntary nature. Although it is good to have general statements, declarations and basic guidelines, the situation and the nature of the challenges demand responses that integrate the legal, economic and governance points of view.
- Since there are many stakeholders involved in sustainability, the document should either narrow its focus to things it can change or broaden it to include all those whom we need to influence (all sub-sectors of the tourism industry and related complementary supply).
- The role of many local authorities in putting forward sustainable tourism agendas is not sufficiently acknowledged since most of them do not form part of established international networks or have contacts with relevant international bodies. Whether it is a good thing or a bad thing, local stakeholders are the ones with main responsibility for tourism. 'Tourism takes place locally and policies need to be devised and implemented locally in order to address the specific needs and limitations of the destination'.
- Tourism workers and trade unions must be added to the list of stakeholders that are currently developing sustainability for tourism.
- Consider the reasons behind the failure of SMEs' response in taking up sustainability initiatives: 'if you want business to be an agent of change, you have to change the behaviour of its clients'. SMEs' concern is to meet the needs of their customers.
- Consider that for an effective implementation of the many action programmes and guidelines developed at international level there is a need for national/regional sustainable development strategies.
- Mention the tourism-related initiatives in supranational regions within the EU (e.g. The Nordic countries, the Alps and coastal regions) as well as the need for integration of the regional objectives.
- Refine references to existing initiatives of other stakeholders (e.g. as for the TOI, Global Code of Ethics, the 1999 CSD7, etc.) and add some more fundamental initiatives regarding tourism and fair trade, human rights, CSR, and consolidated environmental NGOs' contributions.

Disagree / delete

- Do not regard the contribution of a stakeholder segment as insufficient if indicators to measure insufficiency are not provided.

**3.2 Initiatives and contribution of the EC**

Add / improve

- Better incorporate the work (policies and programmes) done or being done in other Commission services regarding sustainable tourism development (e.g.: the 6th Framework Programme).
- Consider that most European policies and programmes do not serve an integrated approach that reflects the needs and concerns at regional and local level and therefore are far from benefiting them.
- Adopt a more proactive and supportive role for local and regional initiatives to adopt sustainable tourism policies.
- Integrated Quality Management is a valuable tool to ensure a more competitive tourism industry which will secure environmental, social and economic benefits for the host community and is based on a partnership approach with the main stakeholders.
- Invest in better statistical information generally and on sustainability in particular.
- Explain how the 'reporting mechanism' would be able to provide useful information without becoming a burden.
- Assess the impact of current liberalisation in the tourism sector before pursuing further liberalisation rounds. If services are provided in another country, the workers posted there should benefit at least from the labour standards and working conditions applicable in that country. Further liberalisation should not affect 'service quality, consumer protection, labour standards and public safety'. Do liberalisation of trade and sustainable trade occur at the same time in tourism? (Assess whether competition is working against local communities in the opening up of tourism markets in developing countries). Analyse whether the GATS decision may overrule other international agreements such as the international Biodiversity Convention.
- Do not overstate the benefits of the Euro-Mediterranean Partnership: so far it is mainly focused on a EuroMed Free Trade Area, with its main impact on sustainable trade.
- Pursue a real European-wide Eco-label for tourism destinations.

**4. The Commission Communication's policy options**

Add / improve

- Consider how the Commission Communication's objectives can be achieved given the absence of any reference to tourism in the Convention for the Future of Europe and the incoming IGC.

- Further consider a true Community policy for tourism related research (including the mutual interaction between tourism and climate change), data and statistics, benchmarking and incentives to other EC policies influencing tourism and its sustainability.
- Reinforce the role of the Tourism focal point within the EC to ensure a leading role for sustainable tourism and maximise the potential of Community action. Although funding for tourism purposes is available, the lack of an ad-hoc tourism programme hinders synergies.
- In a reinforced framework for action the Commission should listen to both industry and trade unions' representatives to find common solutions to the existing problems.
- The selected policy option should be subject to the proactive development of the principles of subsidiarity (formal dialogue with regional and local authorities, partnerships and implementation of real tripartite agreements).
- How could coordination at European level make efforts at local level more efficient?

Disagree / delete

- Vague policy options and little evidence provided in favour of the policy selected.
- The Commission has not been neutral when presenting the policy options.
- Subsidiarity and action at the local level most involved in the customer/supplier relationships are more appropriate.

**5. The concept of action and the Community contribution**

Add / improve

- Take a stronger lead in coordinating and funding partnerships.
- Provide support/incentives to industry, and SMEs in particular, to encourage the development and adoption of sustainability good practices.
- Coordinate information collation and sharing, supported by research as appropriate, including case studies, good practice guides and cost/benefit analyses. Present information in a practical and user-friendly manner, with good practices being disseminated as 'guidance' rather than 'compulsion'.
- Fund consumer awareness and guidance initiatives, working with the media.
- Improve the coordinating role within the European Commission, aiming to ensure that the interests of tourism are fully taken into account in the preparation of legislation and in the operation of programmes and policies which are not themselves conceived in terms of tourism objectives.
- Set up a comprehensive and reliable statistical framework in order to assess, benchmark and monitor tourism development. Support regional tourism observatories.
- Sustainability reporting mechanisms and CSR should also consider the concerns of tourism workers.

- Prepare a Community programme to support and implement sustainable tourism destination management (which could be implemented within the EU regional policy): in so doing the EC would be shifting policy responsibilities to other stakeholders and providing the means to implement these processes.
- The period 2003-2006 should be devoted to awareness raising and to the establishment of partnership and cooperation mechanisms in order to provide the necessary input to implement sustainable guidance at regional/local level for the programming period 2007-2013.
- Promote special forms of tourism (e.g.: cultural and maritime tourism) and take advantage of events with a global dimension to get the message across.
- Implement specific action plans for fragile areas such as the Mediterranean islands.
- Make the distinction between tourism within Natura 2000 sites (where tourism should be limited and have positive effects on nature conservation and social wellbeing) and outside protected areas (where the elimination of negative tourism impacts should be the objective).

Disagree / delete

- The Commission's role should be limited to the entrepreneurial aspect of the tourism sector, other related aspect being dealt with at the relevant Commission sector level.
- Is WTTC a truly representative international body?

**6. The measures that the Commission could envisage**

Add / improve

- In general, the measures should be more concrete, precise and coercive enough to be effective.
- Recognise the particular requirements of SMEs and micro-enterprises.
- Consider legislation if it is the only way to effect change.
- Design at least one specific measure related to training and education.

➤ *The Commission will use the Impact Assessment tool to integrate sustainability concerns into Community policies and initiatives affecting European tourism*

This measure should allow the involvement of all stakeholder groups in the impact assessment. Present the most significant developments regarding tourism-related IA annually.

Integrate tourism as a measure in the operational Interreg III A programmes as well as in the PHARE-CBC, TACIS and MED programmes between neighbouring regions.

Exploit the advantages of the synergy between tourism, agriculture, forestry, environmental politics and small and medium-sized companies.

➤ *The Commission could prepare and adopt an action plan for enhancing the effect of the various Community policies and measures affecting European tourism to support the sustainability of the sector.*

This measure needs realistic targets and achievable actions, and should improve the capacity and leadership of local authorities, encouraging the latter to take up the principles of governance within these decision-making levels and sustainable tourism planning.

The action plan should include issues of equal access to the tourism product and the benefits of tourism, and also equal opportunities within the tourism industry.

The Commission might undertake an analysis of skills and labour transfer in the sphere of tourism to facilitate transnational cooperation between regions and hence it being taken account of in the national action plans for employment. Study the role of immigrants as a working force for tourism and its impact on local economy.

Laying down European standards for the mutual recognition of tourism qualifications would be valuable and would help create employment opportunities through the placement of employees regardless of their nationality.

Local authorities and destination managers would welcome a comprehensive guide to all Commission policies, programmes and studies which relate to sustainable tourism, and to identifying potential funding support for projects in this field.

Study the relationship between biggest TTOO and local tourism suppliers and its effects on competition. Favour local partnerships to counterbalance Tour Operators' market dominance.

Further assess the impact of the accession of new member states in terms of tourist numbers, labour force and new market destinations.

➤ *The Commission could propose a co-operation agreement with the World Tourism Organisation (WTO) in the field of sustainable tourism.*

Identify fields and measures of cooperation defining EC support for WTO global initiatives. Local government must be involved in the preparation and implementation of the agreement via associations such as the Council of European Municipalities and the Regions.

There are other UN agencies that have been substantially involved in sustainable tourism initiatives that should also be included in the scope of this measure. EC-WTO agreement could also expand to sustainable development cooperation in third countries with a particular focus on poverty alleviation strategies through tourism (support a Community-based tourism development in developing countries).

Consider the possibility of a joint partnership between the EC and WTO to take over and manage the EuroVelo network.

➤ *The Commission could launch a European Multi-Stakeholder Monitoring and Steering Group for Tourism Sustainability.*

To add value such a group (supported also by the WTO) must have specific and deliverable objectives. The Commission, not the industry, should lead it, and all stakeholders should be part of all similar groups (e.g. on issues such as seasonality, transport, etc., trade unions have also a role to play). Research, measurement and monitoring must enable both the private and public sectors to adapt to changing needs and demands and better manage demand and supply.

Local and regional governments should be represented via pan-European associations.

Study whether this group can be set up within a Europe-wide network of universities with tourism development units committed to working with non-academic institutions in the private and public sectors in the field of sustainable tourism policy ('this would accord well with the principles of the 6th RTD framework programme which seeks *inter alia* to support the creation of 'knowledge societies' in a wide swathe of policy areas'). Therefore consider including the last measure within this measure.

The development of sustainable tourism information, policy tools and best practice do need further development to facilitate benchmarking and the analysis of information relating to sustainable tourism needs to be developed in a manner which can accommodate the requirements of all different types of destinations.

However, work in this field should respect the principle of subsidiarity and build on work already undertaken within Member States. Getting businesses involved in reporting is challenging, but essential, so the system has to be user-friendly and not too technical. It would be preferable to see workable national systems in place before setting up a European-level system. If, in the future, a European level system is seen to be feasible, we would need to ensure that the European and national systems dovetail and the relevant expert groups in Member States consulted.

Non-tourism stakeholders have a critical role to play in the sustainability of tourism. They can best represent the sustainable development goals and objectives of the host or resident population. Therefore they may also be part of this measure and the following one.

➤ *The Commission could launch a wide-ranging initiative, involving all relevant stakeholders, to further sustainable tourism consumption patterns in Europe. This initiative could focus on the two core problems regarding sustainable consumer choices in leisure tourism, i.e. seasonality and sustainable tourism transport.*

The European round table of stakeholders obviously has to be more than just a talking shop and should look into whether realistic action can be taken.

Build on consumer information to ensure market forces are exerted to promote sustainable management. The business case is not sufficiently won since we need to convince business that acting sustainably helps it to save money, that there are markets looking for sustainable products and that the public sector will help them to find them. Inform tourists on how to prevent damage and harm to the environment, the landscape and agriculture.

Provide reliable and user-friendly information on quality standards in hotels.

With regard to seasonality, illustrate the benefits of staggering holidays in the private and public sector and the impact of pension reforms on the tourism sector in the long term. Improve the quality of tourism-related products and services and expand the transport and economic infrastructures to improve the accessibility of tourist areas and to facilitate crossing borders and the local public transport with the objective of lengthening the season and the duration of tourist visits.

Take account of the changes in the demographic structure and design tailor-made programmes catering for special groups (e.g. the young, the elderly and the disabled etc.)

- *The Commission could prepare and launch a package of special measures for promoting the principles of good governance and fostering Corporate Social Responsibility (CSR) practices throughout the European tourism sector and its stakeholders as a specific initiative within the European Multi-stakeholder Forum on CSR.*

The Commission could provide guidance on the principles of good governance and CSR, but these principles will be best promoted to tourism businesses via member state and regional tourism bodies who can set such guidance within a national or regional context. Consider whether it is possible to do this with large transnational corporations, since for micro-enterprises and SMEs it will be quite difficult.

- *The Commission could prepare and launch a package of special measures aimed at the promotion of sustainable tourist destination development and management.*

The platform of European tourist destinations for dealing with issues of sustainable tourist destination development and management should be open to all destinations in order to facilitate the exchange of good practice and allow for benchmarking and skills transfer between resorts.

The approach taken by the National Tourism Best Value Group in the UK could serve as the model for the pan-European Platform of destinations. IQM provides a tool to achieve it. All the other measures mentioned should be incorporated into the IQM process.

The idea of a consumer awareness campaign should be developed further before judging whether action at a European level could be effective, although a consistent message across Europe could have an effect. It could be effective and useful if seen as a pan-European issue and if one message is seen by tourists all over Europe. It would achieve economies of scale if resourced nationally or at a European level. There is certainly a need for greater coordination of current initiatives and a need to encourage sharing of experience in what works and what does not in influencing consumer choice.

Support the demand for sustainable tourism products and subsequently give an ad-hoc follow-up to public initiatives to support enterprises.

Tri-partite agreements also need further development and evaluation that might be done via pilot initiatives.

Assess whether this measure (make a link to the ESDP) might be funded by the 6th RTD programme, ensure that the management of cultural heritage sites is included in this programme, and study whether Local Research Bodies can be considered beneficiaries of the Community framework programme and could be covered under the last measure.

- *In addition, the Commission could promote the development and use of information tools and networks that involve and target the various types of stakeholders, in order to disseminate best practice and good governance regarding the sustainability of European tourism, at destination and enterprise level.*

Disseminate information through the internet, reliable representatives and networks and consider the coordination of the policies and best practices identified. Action regarding exchange of best practices should follow this circle: awareness, information, dissemination, follow-up and feedback.

The WTO can also help in implementing this and the previous measure through its Destination Management Task Force and the Cooperation Network for the Sustainable Management of Coastal Destinations.



Disagree / delete

- Tourism SMEs cannot cope and benefit from existing legislation and information.
- Any suggested action plan should itself be subject to consultation before implementation. Therefore avoid references to vague action plans. Caution if the Commission intends to impose an action plan on communities.
- Cooperate with the WTO rather than pursuing working agreements.
- A 'round table' of stakeholders to consider the problems of seasonality is unlikely to make a significant contribution to the pressures felt at local level, and the perspective is likely to be too broad and the ability to influence too remote.
- More information is needed before considering whether target-based agreements can be valuable.

**7. What other stakeholders should do.**

Add / improve

- The key stakeholders should also include the host communities, service providers to the tourism industry and the community sector.
- European stakeholders should also be added to the list of those who share a prime responsibility for implementing tourism sustainability.
- Identify the roles and responsibilities of the actors within the tourism consumer chain.
- Indicate how individuals would assume their responsibility through awareness raising in fostering sustainable consumption.
- The overall aim should be to get the consumer to equate sustainable good practice with a quality product.
- Reflect on entering sustainable development principles for tourism in primary schools.
- Industry operators might draft and follow a self-regulation code based on sustainable principles. Refer to the role of tourism and hotel companies in making extensive use of energy, water and waste efficiency and saving measures; the need to favour soft mobility and transport means and take up sustainable technologies.
- Consider the impact of market concentration in the European tourism industry in providing an available range of choices for customers wishing to make a sustainable choice.
- Tourism development may help in the questions related to the development needs of border regions and to their weaknesses: promoting economic diversification, creating new employment opportunities and second jobs.
- Set up an annual sustainable tourism award supported by the private sector.

Disagree / delete

- This chapter generally repeats the statements of the first three paragraphs of chapter 5.
- Do not exaggerate the influence of international organisations, such as WTO or UNEP, in local tourist development.

- Trade unions' role should appear separately to the unspecified 'other stakeholders'
- Include chambers of commerce and industry among 'other stakeholders'
- Further research the potential of tourism environmental taxes.
- Do not favour mass tourism in regions with a tendency to be greatly dependent on tourism since it might result in further dependencies and imbalance in the economic structure of the region.
- Pay more attention to the possible indirect effects of tourism, such as creating new markets for local products and services.