STUDY TO ASSIST THE ASSESSMENT OF THE POSITIVE AND NEGATIVE IMPACTS EXPECTED FROM THE DIFFERENT POLICY OPTIONS IDENTIFIED WITH REGARD TO COMMISSION BASIC ORIENTATIONS FOR THE SUSTAINABILITY OF EUROPEAN TOURISM

Final Report – September 2003

prepared for

DG Enterprise, European Commission

by

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EXECUTIVE SUMMARY

1. Background

Tourism is one of the major economic sectors in the EU, contributing an estimated 5.5% to Community Gross Domestic Product (GDP) as well as having significant secondary economic effects. Tourism affects society in many different ways, and relates to issues such as employment, regional development, environment, consumer protection, health, safety, transport, taxation and culture.

The European Commission's legislative and work programme for 2003 foresees a Commission Communication on 'Basic orientations for the sustainability of European tourism'. The broad aim of the Communication is to show what approach and action is required to promote the sustainability of European tourism, how the European Community can contribute to the sustainability of European tourism and to provide stakeholders with basic orientations on the way to implementing sustainable tourism.

In preparation for the Communication, the Commission launched a consultation document to gather the views of all interested stakeholders. The Commission also selected the proposed Communication as one of 42 proposals for extended impact assessment. Risk & Policy Analysts Limited (RPA) has been commissioned to undertake a study to assist the extended impact assessment of the Communication.

2. Verification of the Challenges of Sustainable Tourism

Cross-border tourist arrivals at European destinations are predicted to double by 2020. Whilst increasing volumes of tourism can bring economic benefits to the industry and to tourism destinations and may be a sign of social development and associated benefits for tourists, they can also cause negative effects.

The Commission emphasises the potentially unsustainable current trends of seasonality and transport. These will have negative impacts on all stakeholders through impacts on the resource base on which tourism depends. The lack of investment in infrastructure, which is related to the need for more sustainable transport networks, is highlighted as limiting growth (and is considered to be a major challenge by some stakeholders). Additional provision of infrastructure may conflict with environmental objectives.

The review of the existing data on tourism patterns and responses to the consultation have thus verified the challenges identified. Stakeholders also believe that greater consideration should be given to the challenge of protecting the cultural and natural resources on which tourism depends.

3. Review of the Main Objective

The aim of the proposed Communication is **to promote further progress towards the sustainability of tourism in Europe and world-wide.** Its objective is to achieve this aim by stimulating multi-stakeholder efforts, which span across all territorial and administrative levels, and to outline how the Community and the other stakeholders can further contribute to them.

The consultation document incorporates the majority of objectives set out in previous relevant EU policies, as well as those at an international level. However, specific objectives may gain from clearer identification to ensure that adequate consideration is given to all aspects of sustainable tourism. This applies in particular to certain environmental objectives related to transport, energy and land management, especially in view of the emphasis given to these by stakeholders.

4. Examination of the Policy Options

The consultation document identifies four policy options to reach the main objective of sustainable tourism:

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

The proposed policy options are all potentially feasible and all receive some support from stakeholders. All options build on the existing framework rather than presenting concrete operational mechanisms.

Option B and C are more in line with the principle of subsidiarity, whereas the principle of proportionality prevails in Option A and D. The level of resources needed in order to implement Option A and D will be considerably higher, although it seems more likely that these will meet the objectives of the proposal (since the first two options are less likely to reverse unsustainable trends in tourism).

5. Analysis of Policy Impacts

The nature of the issues and of the options presented means that quantification of the impacts is not feasible, thus techniques such as cost-benefit analysis and cost-effectiveness analysis can not be used. The assessment of the impacts is therefore based on Multi-Criteria Analysis (MCA). Criteria were developed for the analysis, as shown in Table 1. Each criterion should be measurable, in the sense that that it must be possible to assess, at least in a qualitative sense, how well a particular option is expected to perform in relation to the criterion.

Table 1: Criteria for Analysis		
Group	**Criteria**	**Challenges Addressed**
Group I	Developing consumer awareness	Tourism activity and behaviour
	Achieving integration and coherence between policies and approaches	All challenges
	Developing transparent multi-stakeholder processes	All challenges
	Developing monitoring systems and information dissemination	All challenges
Group II	Reducing seasonality	Concentration of tourism
	Sufficient provision of infrastructure	Economic investment in destinations
	Increasing access to tourism for all citizens	Tourism activity and behaviour
	Promoting sustainable inter and intra destination mobility	Transport
Group III	Increasing the availability of skilled, qualified staff for tourism sector	Competitiveness of supply
	Use of quality and environmental management tools	Competitiveness of supply; Use of natural resources and environmental protection
	Use of new information and communication technology	Competitiveness of supply
Group IV	Ensuring community well-being in destinations	Cultural environment; Economic investment in destinations
	Respecting and maintaining the diversity of cultural heritage	Cultural environment
	Respecting environmental carrying capacity	Use of natural resources and environmental protection

The assessment shows that Options A and D are most likely to achieve progress towards the sustainability of tourism in Europe and world-wide. However, substantial resources would be required to implement Option A, and this Option is not widely supported. Thus Option D is most effective in meeting the challenges of sustainable development, whilst respecting the principles of subsidiarity and proportionality.

6. Monitoring and Evaluation of Policy Impacts

A range of indicators for sustainable tourism has been reviewed to identify ways to monitor and evaluate the results and impacts of the proposal after implementation.

An illustrative list of indicators is provided. We recommend that the Commission works with stakeholders, for example the proposed European Multi-stakeholder Monitoring and Steering Group for Tourism Sustainability to identify a suitable range of indicators. These should consist primarily of measures for which information is either currently available (e.g. from Eurostat or national sources) or can be gathered in a cost-effective manner. As noted in the literature (ARPAER, 2003), the development of a common set of indicators for destinations would allow benchmarking, thus aiding the assessment of policies.

GLOSSARY OF TERMS

Attraction: a permanently established destination, a primary purpose of which is to allow public access for entertainment, interest or education; rather than being a primary retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public, for published each year and should be capable of attracting day visitors or tourists, as well as local residents.

Carrying capacity: limits, or threshold, in tourist activity, based on the characteristics of the locality; the type of tourism; and the tourism/environment interface.

Demand: consumers order for available tourism products.

Destination: the place to which a traveller is going; or any city, area, region or country be marketed as a single entity to tourists.

Ecosystem: a dynamic complex of plants, animals, fungal and microorganism communities and their associated non-living environment interacting as an ecological unit.

Ecotourism: tourism to natural areas that is determined by, and benefits, local communities and the environment.

Indicators: observed values representative of a phenomenon to study. In general, indicators quantify information by aggregating different and multiple data. The resulting information is therefore synthesised. Indicators simplify information that can help to reveal complex phenomena.

Infrastructure: the utilities, transport and other communications facilities required to support tourism activities.

Multi-Criteria-Analysis: a range of appraisal techniques that have the potential to capture a range of impacts/effects that may not be readily valued in monetary or quantitative terms.

Niche tourism: a highly specialized segment of tourism market, such as a group with unique special interest.

Occupancy rate: refers to the proportion of the rooms or bed-places in a collective tourism establishment that is occupied over some period of time, such as a night, month or year.

Responsible tourism: tourism that satisfies tourists, maintains or enhances the destination environment, and benefits destination residents.

Stakeholders: individuals who have a vested interest in development, including community members; environmental, social and community NGOs; natural resource, planning and government officials; hotel owners, tour operators, guides, transportation providers and representatives from other related services in the private sector.

Supply: marketable tourism product available for sale.

Sustainable tourism: tourism that is economically and socially viable without detracting from the environment and local culture.

Tourism: tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

Tourist: temporary visitor staying overnight in the destination visited for a purpose classified as either holiday (recreation, leisure, sport and visit to family, friends or relatives), business, official mission, convention, or health reasons.

Visitor arrivals: includes tourists arriving at the destination for a temporary stay not exceeding one year and for purposes other than immigration, permanent residence or employment for remuneration at the destination.

Visitor: any person visiting a destination other than that in which he has his usual place of residence for any reason other than following an occupation remunerated from within the destination visited.

CONTENTS

1. INTRODUCTION

1.1 Background to the Study

The European Commission's legislative and work programme for 2003 (COM(2002) 590 of 30.10.2002) foresees a Commission Communication on 'Basic orientations for the sustainability of European tourism'. The aim of the communication is to show what approach and action is required to improve the sustainability of European tourism, 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. The European Commission (2003) defines sustainable tourism as:

> *"tourism that is economically and socially viable without detracting from the environment and local culture. Thus sustainability means business and economic success; environmental containment, preservation and development; and responsibility towards society and cultural values – three facets that are interdependent."*

In preparation for the Communication, the Commission launched a consultation document to gather the views of stakeholders. The Commission has also selected the upcoming Communication as one of 42 proposals for extended impact assessment. This Report details the work undertaken to assist the preparation of the Extended Impact Assessment.

1.2 Study Aim

The aim of the study is to assist the Extended Impact Assessment, which is designed to improve the quality of the Commission Communication and its proposal for action and to ensure an analysis of its economic, environmental and social impacts. The study follows the objectives set out in the Project Specification (reproduced in Annex 1).

1.3 Approach and Structure of Report

This study is based on the Commission's Consultation Document on 'Basic orientations for the sustainability of European tourism' (European Commission, 2003a) which was published on April 25 2003, with comments to be submitted to the Commission by 31 July 2003.

It takes account of the Commission Communication on Impact Assessment and the Internal Guidelines on the new Impact Assessment Procedure developed for Commission services. These Guidelines indicate that impact assessment is the systematic analysis of:

- the problem addressed by the proposed Communication (Section 2 of this report);
- the objective it pursues (Section 3);
- the alternative options available to reach the objective (Section 4);

- their likely impacts (Section 5); and
- respective advantages and disadvantages, including synergies and trade-offs (Section 5); and
- monitoring and evaluation of policy impacts (Section 6).

The analysis presented in this Report is based on a literature review of key documents identified by the Commission, stakeholders and the Consultants. It takes account of studies by the OECD, the World Tourism Organisation (WTO), the World Travel and Tourism Council (WTTC), WWF, the European Travel Commission (ETC), the European Environment Agency (EEA) and studies undertaken on behalf of the Commission, as well as academic journals. Data from Eurostat have also been used. In addition, approximately 90 responses to the Commission's consultation were received from a cross-section of stakeholders representing the views of industry, destinations, non-governmental organisations and academic research centres. These have been reviewed and the comments have been incorporated where appropriate.

The timescale for this study was relatively short, and overlapped with the Commission's own consultation period, which limited the scope for additional consultation. The Consultants considered carefully whether additional consultation was necessary to fulfil the objectives of the study and concluded that the quality and coverage of the responses received by the Commission provided adequate stakeholder input. Consultation responses were received from European/international associations, or associations representing organisations in a number of countries. Responses from regional and local organisations were also received, representing countries such as Spain, France, Italy, Germany and the UK, the most popular travel destinations in the EU (based on Eurostat figures).

2. VERIFICATION OF THE CHALLENGES OF SUSTAINABLE TOURISM

2.1 Predicted Trends in European Tourism

Tourism is one of the major economic sectors in the EU, making up an estimated 5.5% of Community Gross Domestic Product (GDP). It is an activity which affects society in many different ways, and relates to issues such as employment, regional development, environment, consumer protection, health, safety, transport, taxation and culture.

In 2001, international arrivals declined by 0.6%, both worldwide and within Europe. This was the first year of negative growth in tourism since the early 1980s (IPK International 2002). However, following an average increase of 3.8% per year during the past two decades and an exceptional year in 2000, international organisations predict an average increase of approximately 3-4% per year in European tourism activity over the next decade and even up to 2020 (IPK International, 2002; WTTC, 2003; and WTO, 2003). Such quantitative predictions are based largely on global trends and data submitted to the organisations by individual countries or companies.

ETC (nd) provides more qualitative predictions, suggesting that tourism is becoming more volatile and subject to recessions, concerns about security and safety or environmental threats, especially to health. Although these factors are generally related to particular destinations or regions, ETC warns that universal growth can no longer be taken for granted. However, there is considerable potential for tourism growth in terms of the population. ETC quotes WTO figures, which estimate that less than 3.5% of the world population currently takes part in international travel and predict that this could increase to 7% in the next decade. WTO (2003) suggests that cross-border tourism arrivals in European (not just EU) destinations will reach 717 million in 2020, more than doubling the number of arrivals in 1995 (338.4 million). This would be in line with the economic growth in travel and tourism demand predicted by WTTC (2003).

The close proximity of the many relatively small European countries stimulates intra-European travel, and 75% of Europeans travelling abroad travel within Europe (European Commission, 2003b). The predicted growth in international arrivals is likely to result from more Europeans taking more frequent, but shorter, trips, easier cross-border travel for people from the Accession countries and potentially an increasing proportion of the world's population travelling internationally. For example, WTO reports that East Asia/Pacific, Africa and South Asia have all experienced growth levels for 1990-1999 well above the world average in terms of generating tourists. Furthermore, long-haul travel worldwide is predicted to grow faster, at 5.4% per year over the period 1995-2020, than interregional travel, at 3.8%.

However, most tourist trips are not international but are within the country of origin (EEA, 2003a). In Europe, domestic tourism accounts for 20-90% of all tourist trips, with northern countries having smaller shares of domestic tourism and southern countries relatively higher shares. In general, domestic tourism displays a much

flatter growth rate than international tourism, and OECD (2002) predicts that it will stabilise before 2020. In contrast, IPK International (2002) suggests that many European countries are currently observing increases in domestic travel and more travel within the same region.

The validity of quantitative projections of future tourism activity for the EU are questioned by some stakeholders, as there is limited EU-wide data collection on which to base such projections. However, it is generally accepted that tourism has shown consistent growth (with a few exceptions in short periods of economic or political crisis) (ETC, nd). Although tourism can bring many benefits, it can also pose challenges that need to be addressed to ensure its sustainability. The challenges faced by tourism are present today, regardless of future growth, and the following sections discuss the key challenges for sustainable tourism that the proposed Commission communication is designed to address.

2.2 Concentration of Tourism Activity

The concentration of leisure tourism in Europe in specific, restricted periods of the year is considered by the Commission as a major issue for the sustainable development of the tourism industry. Figure 2.1 shows the monthly distribution of tourism activity in Europe between 1997 and 2000, based on Eurostat data. The high peak of tourism is in the summer season. The graph also shows the increasing volume of tourism from 1997.

Seasonality is due to:

- the climate at the destination and/or at the place of origin of the tourist;
- the constraints of school and other holidays;
- festivals (religious, cultural, carnivals, etc.) and special attractions (e.g. conferences, incentive tours, exhibitions); and
- lifestyle (e.g. a preference for taking holidays in August) (Bar-On, 1999).

Consultation responses support the view that both temporal and spatial concentration of tourist activity pose challenges to the tourist industry. Only one respondent considered that seasonality was not a main challenge. Respondents considered that seasonality should be reduced and that the spatial concentration of tourism was also a significant issue that is reinforced by, but not solely dependent on, seasonality. For example, data show that the number of arrivals to Spain, Italy and France in the summer season is two to three times the number of arrivals in winter season (Eurostat, 2002a) whereas arrivals to the Netherlands, Austria and Finland are more evenly spread throughout the year.

Some consultation responses suggest that seasonality can be managed and reduced. ETC (nd) also suggests that seasonality should be regarded as a marketing opportunity rather than a problem. However, the expected growth in European tourism, discussed above, may outweigh any progress in addressing seasonality.
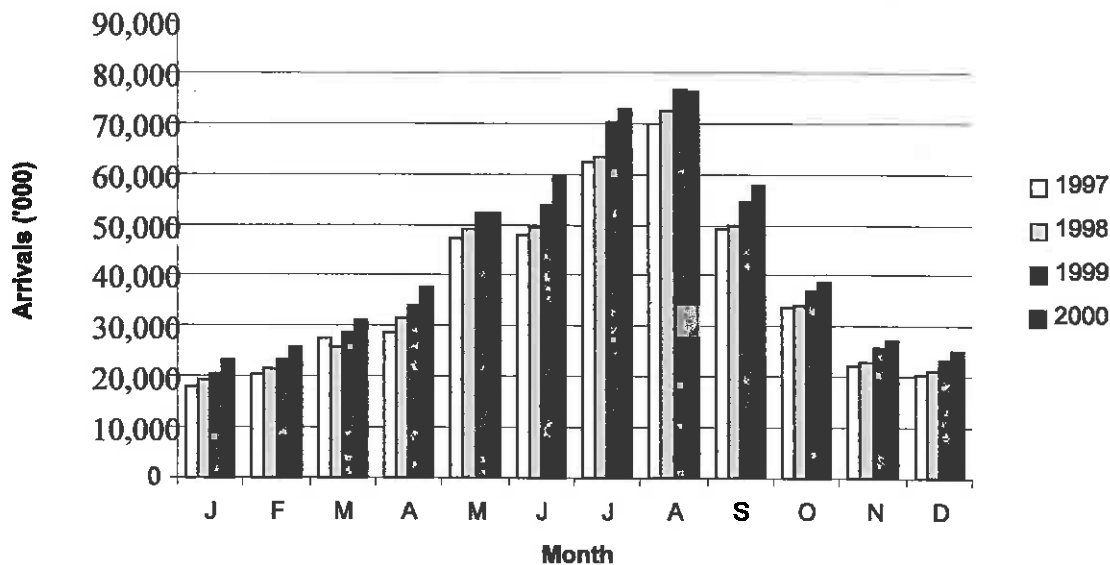
Figure 2.1: Flows by Month of Year

The impacts of concentration can be negative for all stakeholders, reducing the competitiveness and quality of the tourism product and destination. It can impact on natural and cultural resources at the destination, as well as the quality of the experience for the tourist. Seasonality may mean that tourist facilities are empty or suffer from low occupancy/visitor rates for much 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 (Eurostat, 2000a) but only around 20% in low season. Off-season operation leaves over-capacity in large infrastructure 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 (Bar-On, 1999).

2.3   Transport

Along with seasonality, the European Commission (2003a) recognises tourist transport as one of the key challenges. For intra-European tourism, the private car is the dominant transport mode (58%), followed by air (31%) and rail travel (10%) (European Commission, 1998a). Although the use of rail travel has been declining, demand for this mode by both business and holiday travellers is starting to increase in some European countries (EEA, 1999). Rail travel is particularly important for French tourists, while air transport is popular with British and Luxemburgish tourists (European Communities, 2002a).

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 (European Commission, 2003b). The EEA (1999) identifies international tourism as

the main driver behind the increase in demand for passenger transport and predicts that passenger air travel will double by 2010, compared to 1995. It is also indicated that the most important regional environmental impact of tourism is related to transport, with travel to and from destinations being responsible for 90% of the energy used in the sector. Domestic tourism trips are typically shorter in duration, cover less distance and are principally taken by car (OECD, 2002).

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 air fares (EEA, 1999). During the 1990s, reduced travel costs, particularly for air transport, increased the attractiveness on intra-European travel and personal mobility (WTTC *et al.*, 2003). This has enabled an even larger share of the population to travel, as well as encouraging shorter, more frequent trips (Bar-On, 1999). There has also been a gradual move away from passive, single location-type holidays to more active holidays. This, in turn, has placed significant demands on the transportation systems within destinations themselves (European Commission, 2003b).

Consultation responses support the identification of travel patterns, and in particular increasing transport use, as a significant challenge for tourism. The need to improve public transport networks in a sustainable manner is recognised, with one respondent suggesting that the Commission gives insufficient attention to transport systems within the consultation document. There is also concern among stakeholders that the cost of travel, and in particular air travel, does not reflect its true environmental and social cost and that the contribution of transport to climate change should be emphasised.

2.4 Type of Tourism Activity and Behaviour

WWF-UK (2002) suggests that consumers currently do not take environmental impacts into account when buying a holiday. However, Goodwin and Francis (2003) suggest there is a trend towards more responsible tourist behaviour in the UK, based on an increasing proportion of consumers willing to pay more for an ethical holiday. WTTC *et al.* (2002) also provide evidence for this trend, suggesting that eco-tourism world-wide is growing 20% annually compared with just 7% for tourism overall. There is strong agreement between stakeholders that there is a need to increase consumer awareness of sustainable tourism, as this has the potential to trigger changes in the tourism product offered.

The World Tourism Organisation predicts that most of the increase in European arrivals over the coming decade will come from alternative forms of travel not involving the classic 'sun and sand' tourism. 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 these are influencing traditional package tours (WTTC *et al.*, 2002). This type of tourism is expected to grow faster than any other market segment.

The increase in cultural and nature-based tourism is influenced by the emergence of an 'experience-based economy', where people are becoming more discerning in their choice of destinations, leading them to search for new places and new tourism

products. Changes in the demographic structure of Europe may also have an influence on the type of tourism. 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, with cultural and natural heritage related tourism expected to grow the most.

2.5 Competitiveness of Supply

European destinations currently account for nearly 60% of all international tourism activity world-wide. However, this share is decreasing due to the growth of competing destinations, falling from 63% to 58% between 1980-1998. A further decline to 46% is expected by 2020, as tourism in the East Asia/Pacific region expands (European Commission, 2003b; OECD, 2002; WTO, 2003). European enterprises are unlikely to be able to compete with these emerging destinations on price, and must therefore improve quality to remain competitive.

A key feature of sustainability for the industry is economic sustainability, and thus profit, to ensure the economic and social benefits provided by the industry. WTTC (2003) predicts annual increases for the European Union of 3.1% in direct travel and tourism GDP and 1.2% in direct employment between 2003 and 2013. Industry stakeholders emphasise that growth in visitor numbers does not necessarily result in increased profitability. For example, 'bargain' tourism reduces profit margins and thus the potential for enterprises to invest in environmentally and socially responsible tourism.

Despite increasing consolidation and vertical integration, the European tourism sector is dominated by small and medium sized enterprises (SMEs), with over 99% of companies employing fewer than 250 individuals (European Commission, 2003b). However, a few large companies manage a significant proportion of the volume of trade, particularly at an international level. The European Commission (2003b) suggests that integration between producers and travel organisers and between different modes within a sector will become vital to competitiveness. This is a logical trend because tourists expect a higher quality service and an integrated, and thus convenient, tourism offering will meet these requirements.

Seasonality 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 impacts on the competitiveness of the supply chain, as quality in the tourism product cannot be achieved without the skill and motivation of the workforce (Crauser, 1998). In much of Europe, birth rates have fallen during the last three decades, reducing the numbers of young people who traditionally form the main labour source for the hospitality and catering sector (European Commission, 2003b). More than a third of employers report serious shortages of skilled workers (WTTC *et al.*, 2002).

One of the catalysts creating demand for trained, skilled workers within the industry is the increasing use of information technology (IT). The predicted growth in tourism is likely to lead to a greater dependency on IT (WTTC *et al.*, 2002). By using the

potential of the Internet, even small hotels should be able to compete with larger players. However, it is reported that only half of the tourism SMEs have incorporated the Internet into their day-to-day activities. At present, most consumers have yet to be convinced of the advantages of direct booking, and the corporate sector in particular continues to use travel agents. In the longer term, however, direct selling will pose a challenge to travel agents as travel is the most popular item purchased over the web (European Commission, 2003b).

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 (WTTC *et al.*, 2002). This includes adhering to fundamental employment, environmental and socio-cultural standards. The European Commission (2003b) reports that environmental care is a priority for the major players in the tourism market but social responsibility is currently less important, although there is a trend towards greater awareness.

2.6 Economic Investment in Destinations and Local Communities

Tourism can support economic development and is an important element of many countries' economies (WTTC *et al.*, 2002; WWF-UK, 2002). The inflow of revenue to tourist destinations creates business turnover, household income, employment and government revenue (Archer and Cooper, 2000). 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 (WTTC *et al.*, 2002; WWF, 2001).

Tourism appears to be more effective than other industries in generating employment and income in the less developed, often outlying, regions of a country where alternative opportunities for development are more limited (Archer and Cooper, 2000). This impact is increased by the rise in cultural, heritage and wildlife niche market tourism. Research undertaken by WTTC demonstrates that the impact of travel and tourism on the economy is much greater than the size of the industry itself (WTTC *et al.*, 2002). A proportion of the income received by the sector is re-spent within the destination economy, thereby creating further rounds of economic activity. These secondary effects can exceed the initial direct effects (Archer and Cooper, 2000).

The generation of government revenue and subsequent provision of infrastructure is mentioned briefly in the consultation document as an issue for both tourism enterprises and destinations. Some consultees consider that development of infrastructure should be included as a main challenge. Infrastructure and distribution systems need to be developed nationally and internationally to ensure sustainable tourism development. Local infrastructure development is seen as a means of targeting regional funds to build practical infrastructure in economically disadvantaged areas. In addition, it is important for sustainable tourism to ensure that the distribution of profits is balanced between the tourism destinations and the companies, to reduce leakage.

SMEs believe that inadequate public infrastructure hinders their growth (European Commission, 2003b); and this is supported by WTTC *et al.* (2002). The issues facing infrastructure are becoming more acute with the continuing increase in travel. However, increased environmental concerns may also affect infrastructure developments; 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 better environmental protection (OECD, 2002; WWF, 2001).

2.7   Cultural Environment

The cultural environment is considered to be a basic resource of tourist destinations. In some cases, however, tourism movements have exacerbated the homogenisation of global products and services devoid of local identity. Although tourism can promote cross-cultural contacts, contributing to a better understanding of, and increased interest in, the preservation of cultural heritage (WWF, 2001), short-term tourists may also seek to retain their own habits and practices, with host communities adapting to satisfy visitor tastes in order to make money from them. Those with vulnerable cultures are likely to suffer most and local disaffection is most strongly felt where tourist densities are high.

The European Commission (2002b) identifies regions where the number of overnight stays per inhabitant is particularly high, increasing the pressure on local communities. For example, Ireland and Austria both recorded 11.2 overnight stays per inhabitant but specific regions, such as the Islas Baleares in Spain, Notio Aigaio in Greece and the Tirol in Austria, recorded much higher densities, at 87.1, 64.1 and 45.5 respectively.

There is limited discussion in the consultation document of the challenges to the cultural environment from tourism. Consultees identify the need to maintain social and cultural identities, as well as the challenges related to tourist safety. Cultural heritage should be seen as intrinsically linked to issues of sustainability, creating social capital for local communities. Responses also suggest that sustainable tourism should entail the survival, revival or maintenance of the wide variety and diversity of cultural expressions.

2.8   Use of Natural Resources and Environmental Protection

The rise of mass tourism can increase the threat of destruction of fragile ecosystems and coastal regions, local culture and the depletion of natural resources (WTTC *et al.*, 2002; OECD, 2002). The European Commission recognises the natural environment as a basic resource of a tourist destination and foresees that sustainable destination development requires protecting the environment and natural resources.

The scenery is the main factor for choosing a destination for 49% of European holidaymakers (European Commission, 1998a). Although very few Europeans report specific problems encountered on holiday, when they do it is either the general state of the environment (9%) or the state of the environment in the tourist places they visited (8%) which are highlighted. Thus environmental degradation can threaten the

viability of the industry. Some consultation responses suggest that sound environmental management should be at the heart of the tourism agenda and that the Commission pays insufficient attention in the consultation document to the challenge of reducing the environmental impact of tourism. Use of land and of water resources are highlighted as particularly significant. In particular, the need to protect the environmental sustainability of rural and coastal communities is raised.

The European Commission (2002b) considers that any increase in tourists undoubtedly has an impact on environmental variables such as waste generation, pollution emissions and energy consumption. Although this is difficult to quantify, differences in these variables between the regions with the highest tourism density and those with the lowest density do indicate a causal link.

UNEP (2002) notes that negative impacts from tourism occur when the level of visitor use is greater than the environment's ability to cope with this use within the acceptable limits of change. In other words, the environmental carrying capacity of a destination is exceeded. WWF-UK (2002) indicates that the most significant environmental impacts related to tourism are air travel, waste generation, food consumption and hotel energy, and that tourists may compete with local populations for resources. For example, the industry may overuse water resources for hotels, swimming pools, golf courses and personal use by tourists, resulting in water shortages and degradation of supplies. By 2025, it is predicted that half of the Mediterranean countries will be using freshwater resource in excess of their regeneration rates (WWF, 2001). Further examples given by UNEP (2002) and WWF (2001) of environmental impacts associated with tourism include air pollution and noise; deforestation and erosion; reduction of biodiversity and species loss; over consumption of resources and intensive urbanisation and aesthetic pollution caused by large resorts.

All stakeholders are likely to be negatively impacted where the use of natural resources leads to degradation in their quality. 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. Carrying capacity is not fixed but depends on the effectiveness of environmental management in place. 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 being impacted and the infrastructure and management in place (WWF, 2001).

2.9   Conclusions – Impacts of a No Policy Change Scenario

In the absence of a policy change, significant growth in European tourism is predicted. The number of people travelling will increase, in particular older people and citizens of the Accession Countries, and there will be an increased number of shorter, more frequent trips per person. This will result in the increased use of private cars and air transport, facilitated by low travel costs.

Leisure tourism motivated by cultural and natural resources is expected to increase, which may encourage travel outside of peak seasons and favour SMEs. This will be supported by a gradually increasing awareness of responsible tourist behaviour. However, negative trends in seasonality and spatial concentration of tourists can be expected to continue, driven by climatic and lifestyle factors, placing increasing pressure on destinations.

More discerning tourists and greater price competition from world-wide destinations will require European tourism enterprises to compete more on quality. Slow improvements in staff training and uptake of environmental and quality management may prevent tourism enterprises (and particularly SMEs) meeting consumer demands. Limited adoption of technology may also negatively affect the competitiveness of enterprises.

Increased tourism may improve the economies of destinations, providing income and employment, but a lack of investment in infrastructure may hinder the predicted growth. In some areas, further development of infrastructure may be contested on environmental grounds. Unmanaged increases in tourism can be expected to have a negative impact on the community and environment of vulnerable destinations.

The Commission correctly emphasises the potentially unsustainable current trends of seasonality and transport, which will have negative impacts on all stakeholders, through destroying the resource base on which tourism depends. Associated with seasonality is the impact on employment conditions, which in turn influences the quality and thus economic sustainability of the tourism industry. Greater consideration could be given to the social challenges, particularly regarding the need for better employment opportunities. Lack of investment in infrastructure, which is related to the need for more sustainable transport networks, is also highlighted as limiting growth and is therefore considered to be a major challenge by some stakeholders. However, this may conflict with environmental objectives and should therefore be considered carefully. Stakeholders also believe that greater consideration should be given to the challenge of protecting the cultural and natural resources on which tourism depends.

3.   REVIEW OF THE MAIN OBJECTIVE

3.1   Objectives Identified in the Proposed Communication

The aim of the proposed Communication is **to promote further progress towards the sustainability of tourism in Europe and world-wide** (sustainable tourism is defined in Section 1.1). Its objective is to stimulate multi-stakeholder efforts to this end, which span across all territorial and administrative levels, and to outline how the Community and the other stakeholders can further contribute to them. This can be subdivided into the following three specific objectives:

- to achieve a **balanced approach based on the three pillars of sustainability**;
- to achieve **sustainable consumption patterns**; and
- to achieve **sustainable production patterns** in relation to:
  a)   the **supply chain**; and
  b)   **sustainable destination development.**

A number of more specific objectives, actions and conditions are further identified by the Commission as necessary to achieve sustainable tourism. Consultation responses indicate general agreement with the objectives identified in the document.

3.2   Objectives Identified by a Review of Relevant Literature

In order to assess the plausibility of the Commission Communication on sustainable tourism, it is important to investigate whether the proposed objectives take into account other relevant aims set out by the Commission, by other institutions within the EU and/or by international and global organisations. This assessment focused on overarching policy documents at the EU and at international level, directly related to sustainable development and sustainable tourism. Annex 2 gives a detailed account of how the consultation document incorporates the policy objectives of the documents reviewed.

At the EU level, the following were reviewed as the most relevant to sustainable tourism:

- *"Tourism & Employment"*, which includes most of the previous work by the Commission and other European institutions on tourism, in particular on the quality of employment in the sector;
- *Working together for the future of European tourism* (Commission Communication), which links tourism with sustainable patterns of development;
- *A Sustainable Europe for a Better World*, setting the EU Strategy for sustainable development;
- *Environment 2010: Our future, our choice*, focusing on the state of the environment and setting up the 6th Environment Action Programme;
- *European Transport Policy 2010: Time to decide*, the EU White Paper on transport policy; and
- *A business contribution to sustainable development*, a Commission Communication on Corporate Social Responsibility.

At international/global level, the following documents were reviewed:

- *Agenda 21 for the Travel and Tourism Industry*;
- *World Summit on Sustainable Development Plan of Implementation*; and
- *World Tourism Organisation Code of Ethics for Tourism.*

3.3 Analysis of Objectives

The proposed Communication incorporates the majority of objectives set out in previous work, both at EU and international level. In particular, it incorporates the following as objectives:

- sustainable consumption and production patterns;
- quality development and competitiveness of the industry;
- the case for production of new jobs and improvement of the working conditions of existing employment;
- protection and restoration of the environment and natural resources as well as respect for the carrying capacity; and
- corporate social responsibility.

However, the above documents contain other objectives that are considered within the text of the Communication but are not identified as objectives *per se*. These are:

- transport issues;
- land use management issues;
- climate change and use of clean energy;
- threats to human health; and
- the role of information, knowledge of industry and its dissemination.

It could be argued that these objectives form part of the aim of the communication, as they contribute to sustainable consumption and production patterns. However, a number of consultees indicated that they would favour further emphasis on these issues, which would be assisted by the formulation of specific objectives.

Overall, there was a positive response from stakeholders to the objectives set out by the consultation document and it incorporates the majority of objectives set out in previous relevant EU policies, as well as those at an international level.

However, specific objectives may need to be spelled out, rather than incorporated within the text, to ensure that adequate consideration is given to all aspects of sustainable tourism. This applies in particular to certain environmental objectives relevant to transport, energy and land management, especially in view of the emphasis given to these challenges by stakeholders, and highlighted in Section 2.

4. EXAMINATION OF THE POLICY OPTIONS

4.1 Overview

The consultation document identifies four policy options to reach the main objective of sustainable tourism:

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

These options represent different degrees of use of the existing framework, and therefore they do not present concrete operational implications for tourism other than setting up the appropriate mechanisms in order to enhance more effectively the Community action regarding tourism.

4.2 A Comprehensive Genuine Community Policy in the Field of Tourism (Option A)

Option A would develop a comprehensive Community policy in the field of tourism. This would include the formulation and implementation of tourism-specific actions, requiring a greater input of resources from the Commission than other options.

Many consultation respondents supported this option. However, the Commission (2003) considers that the current situation in the field of tourism and the past position of Member States' on such an approach means that this Option could not be expected to receive the support needed for achieving rapid progress towards sustainability in European tourism.

For this reason, the Commission has not developed detailed proposals as to how this policy might be implemented in practice. Therefore it is necessary to assume that the policy may have an integrated effect on the current disperse direct and indirect Community action on tourism.

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 could be considered that this option would undermine the principle of subsidiarity. In other words, solutions to issues that may best be dealt with at the local level would be constrained by a generalised European framework. This is a 'top down' approach which may not demonstrate identifiable or quantifiable added value. In addition it may not adequately address the concerns of SMEs, which dominate the industry, and indeed it may pose considerable burden on these enterprises. A legislative approach is most strongly opposed by industry representatives.

4.3 A Non Action Scenario (Option B)

A wide range of stakeholder initiatives and contributions are already in place, which address various aspects of sustainable tourism at different levels. Under the 'non action' scenario, the Commission would rely solely on existing initiatives and contributions of stakeholders with regard to the sustainability of tourism at various levels, without taking any further action, either in terms of general policies that may affect tourism or specific tourism measures. This option does not include any measures initiated by the European Commission.

This option represents a reduction in European-wide action compared with the current situation. It would involve the least cost for the Commission in terms of resources. However, analysis of the challenges faced by the European tourism sector would suggest that the existing initiatives and contributions by the different stakeholders have not yet been adequate to achieve a sustainable European tourism.

The principle of subsidiarity encourages issues to be addressed at the lowest level effective. Consultation responses suggest that experience to date has shown that 'bottom up' environmental initiatives work effectively, and there is strong support for voluntary initiatives, particularly from industry representatives. However, given the importance of the tourism sector to the EU economy and the associated magnitude of both social and environmental impacts, it may be considered that Community-level action in this field would be justified.

Many stakeholders consider a non-action option unacceptable. WWF (2001) considers voluntary schemes to be an important step towards more responsible tourism but, owing to their proliferation, their benefits and effectiveness are not clear, particularly to consumers. In addition, even if voluntary measures gain acceptance, they will not necessarily be sufficient to prevent negative impacts from tourism.

4.4 Relying on Established Contributions (Option C)

This option uses two approaches:

a) building on the activities of other stakeholders; and
b) integration of the sustainability of European tourism into established Community measures.

This Option builds on the 'non action' scenario (B), with an incremental increase in the level of resources utilised by the Commission. It is close to the current situation but would enhance stakeholder initiatives through the Commission's support and involvement. Thus, the principle of subsidiarity would be respected, as responsibility for the initiatives would remain entirely with these stakeholders.

A number of established Community measures exist to promote sustainability in general, and the tourism sector benefits from a number of EU-wide initiatives. This Option would rely exclusively on these policies and measures as the Community contribution to the sustainability of European tourism, and would exclude any tourism-specific Community activities to improve sustainability.

Thus the Commission would continue to take action to improve sustainability generally, with potential benefits for tourism, but this Option may fail to adequately address the specific challenges faced by the tourism industry. Some stakeholders recognise the importance of ensuring that general Community measures take account of tourism sustainability, but they do not consider this Option to be sufficient.

4.5 Reinforcement and Best Use of the Existing Framework for Action (Option D)

Building on the previous options, Option D would reinforce the existing framework for action by:

- reinforcing existing stakeholder initiatives, other than those of the Community, in this field; and
- greater involvement of the Commission through:

    o maximising the effect of Community policies and measures on the sustainability of European tourism; and
    o defining and implementing complementary specific measures in the sphere of tourism for the purpose of promoting sustainability throughout the Community, which particularly target support of and involvement in other stakeholders' initiatives and which fills the gaps left by Community policies and measures affecting tourism. These specific measures are described in Annex 4.

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 whilst providing support in areas where gaps in current activities have been identified. Thus, both the principles of subsidiarity and of proportionality are potentially respected.

This Option is in line with the conclusions of the United Nations Commission on Sustainable Development at its seventh session (UNCSD7) attended by trade associations in 1999 (WTTC *et al.*, 2002), as well as those of the European Tourism Forum. At the latter, Crauser (1998) concluded that, at the level of the European Commission, there is a need to strengthen the co-ordination between Community policies affecting tourism. A double approach was identified, which favours using the full potential of a range of Community policies and organising co-ordination and co-operation with all stakeholders on subjects of common interest.

This Option is favoured by the Commission and receives strong support from the range of 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 in reinforcing the existing framework for action, in order to act in proportion to the magnitude of impacts. However, some stakeholders consider this Option to be in conflict with the principle of subsidiarity, questioning how co-ordination at a European level could make efforts at a local level more efficient or effective.

4.6 Conclusions

The proposed policy options are all valid in that they are all potentially feasible and all receive some support for stakeholders through building on the existing situation.

In moving through the options from B to C to D to A, the consideration of subsidiarity decreases, consideration of proportionality increases, and the level of Commission resources need to implement the option increases. There is also greater confidence that the later options (D and A) will meet the objectives of the proposal, since the other two options (B and C) reflect less than current, and (approximately) the current situation, and thus significant improvements in currently unsustainable trends can not be expected.

Option A is likely to go beyond the competencies of the tourism sector, which often operates at regional and local levels. It may therefore undermine the principle of subsidiarity, without significant benefits. A more detailed analysis of the options is given in the following Section.

5. ANALYSIS OF POLICY IMPACTS

5.1 Overview of Assessment Framework

As the policy options do not present concrete operational implications for tourism, other than establishing the appropriate mechanisms to enhance Community action regarding tourism, quantification of the impacts is not feasible. Techniques such as cost-benefit analysis and cost-effectiveness analysis can not, therefore, be used. Instead, this assessment of the impacts is based on Multi-Criteria Analysis (MCA). The aim of MCA is to enable a comparative assessment to be made of the impacts of alternative and competing options, by reference to an explicit set of specified objectives and associated criteria. MCA techniques thus follow a stepped approach to evaluation, consisting here of:

- Step 1: scoping of issues;
- Step 2: selection of assessment criteria (including definition); and
- Step 3: assess options against criteria, involving, in this case, completion of an Assessment Summary Table (AST).

Step 1 has been addressed in Sections 2 and 3 of this report, which identified the challenges and objectives for achieving more sustainable tourism. It should be noted that the analysis of the policy options assumes that existing initiatives and Community policies affecting tourism are effective in pursuing and achieving their objectives. Whilst this may not always be the case, such an assumption affects the baseline against which to compare the options, and thus any variation in this assumption would not alter the relative advantages and disadvantages of the policy options.

5.2 Selection of Assessment Criteria

Comparing the different options requires the selection of criteria to reflect their performance in meeting the overall aim of promoting further progress towards the sustainability of tourism in Europe and world-wide and addressing the challenges identified in Section 2 of this report. Each criterion should be measurable, at least in a qualitative sense. In selecting the criteria, DETR (2000) recommends considering the question *"is it possible in practice to measure or judge how well an option performs on these criteria?"* DETR (2000) suggest that criteria for MCA should be assessed against a range of qualities:

- **completeness** – all important criteria should be included;
- **redundancy** – are there any criteria which are unnecessary?
- **operationality** –each option can be judged against each criterion;
- **mutual independence** of preferences – an option can be assessed on one criterion without knowing its performance on other criteria;
- **double counting** – related to mutual independence of preferences, the same impact should not be assessed more than once by the criteria; and
- **number** – an excessive number of criteria leads to extra analytical effort in assessing input data and can make communication of the analysis more difficult.

Through discussions with the Commission a set of criteria has been agreed, which respect the above qualities as far possible[1]. The criteria reflect the fact that the impacts of the policies will be indirect, through the setting up of mechanisms to enhance the actions of others. Table 5.1 presents the criteria, together with an indication of the main challenges for sustainable tourism (as identified in Section 2 of the report) to which they relate.

Table 5.1: Criteria for Analysis		
Group	**Criteria**	**Challenges Addressed**
Group I	Developing consumer awareness	Tourism activity and behaviour
	Achieving integration and coherence between policies and approaches	All challenges
	Developing transparent multi-stakeholder processes	All challenges
	Developing monitoring systems and information dissemination	All challenges
Group II	Reducing seasonality	Concentration of tourism
	Sufficient provision of infrastructure	Economic investment in destinations
	Increasing access to tourism for all citizens	Tourism activity and behaviour
	Promoting sustainable inter and intra destination mobility	Transport
Group III	Increasing the availability of skilled, qualified staff for tourism sector	Competitiveness of supply
	Use of quality and environmental management tools	Competitiveness of supply; Use of natural resources and environmental protection
	Use of new information and communication technology	Competitiveness of supply
Group IV	Ensuring community well-being in destinations	Cultural environment; Economic investment in destinations
	Respecting and maintaining the diversity of cultural heritage	Cultural environment
	Respecting environmental carrying capacity	Use of natural resources and environmental protection

5.3 Assessment Summary Table (AST)

The assessment framework is built around an Assessment Summary Table (AST), Table 5.2. This provides a structure for assessing the options in a transparent manner. In order to give a qualitative description of the way each option performs against each of the selected criteria/modes of action, a scale was devised as given in Table 5.3.

Table 5.3: 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

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[1] The concept of sustainability emphasises the interdependence of social, economic and environmental factors. It is therefore not possible to select completely independent criteria, but the degree to which criteria are related should be limited.

Table 5.2: Assessment Summary Table

	Option A	Option B	Option C	Option D
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.
	++	+	+	++

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Table 5.2: Assessment Summary Table

	Option A	Option B	Option C	Option D
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 impact on sustainable mobility has yet to be observed but it will at least promote the concept and has the potential to address the key impacts.	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.
	++	?/+	?/+	+

Table 5.2: Assessment Summary Table

	Option A	Option B	Option C	Option D
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. ++

5.4 Assessment of Option A – A Comprehensive Genuine Community Policy

The Commission has not developed specific plans 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 the 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 excluded from 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 tourist destinations to which the policy would apply. Similarly, Natura 2000 sites require local authorities to manage part of their area differently, and in accordance with stricter requirements, than the remaining area. Adopting a tourism policy may provide greater support to addressing the challenges for both destinations and enterprises.

Option A has the potential to add administrative burden to local authorities and enterprises (particularly SMEs) whilst achieving relatively few additional improvements compared to Option D. In addition, the challenges facing tourism are already present, 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.

5.5 Assessment of Option B: A Non-Action Scenario

WTTC *et al.* (2002) and OECD (2002) note that increased dialogue between stakeholders, in both the private and public sectors, has led to the establishment of voluntary initiatives throughout the last decade to address and diminish the social and environmental impacts, while enhancing the economic benefits of tourism activities. These initiatives have taken various forms and involve all sectors of the travel and tourism industry. It is not possible to review the contribution of all of these initiatives towards sustainable tourism in detail. Instead, the analysis focuses on the key initiatives identified in the consultation document, as listed in Box 5.1, supplemented by tourism-specific measures reported by Member States in preparation for the Johannesburg Summit (UN, 2002). This provides a representative sample of initiatives, ranging from international guidance to actions taken at the destination level, which can be assessed in view of the current trends identified in Section 2.

Box 5.1: Existing Stakeholder Initiatives to Sustainable Tourism	
• World Summit on Sustainable Development (WSSD) Plan of Implementation (2002) • WTO's Sustainable Tourism – Eliminating Poverty (2002) • Tour Operators Initiative (2000) • UN Commission for Sustainable Development's Decision on Tourism and Sustainable Development (1999) • WTO's Global Code of Ethics for Tourism (1999)	• WTO's Guide for Local Authorities on Developing Sustainable Tourism (1999) • UNEP's International Guidelines for Sustainable Tourism (1999) • WTO's Guide – What Tourism Managers Need to Know (1997) • World Tourism Organisation (WTO) and Earth Council' Agenda 21 for the Travel and Tourism Industry (1996)

Existing stakeholder initiatives have been most active in developing consumer awareness and promoting the use of environmental management tools. This is reflected in reports of increasing trends towards responsible tourism and the considerable number of eco-labelling schemes that have been developed at various levels in Europe. WTTC *et al.* (2002) notes that, although there has been an encouraging growth in such schemes, adoption of them by the industry is as yet limited. This is supported by the findings of the European initiative VISIT, which states that the 40 regional, national and international eco-labels for tourism have had a limited effectiveness. A number of monitoring schemes have also been implemented at various levels, and channels exist for information dissemination. However, these tend to lack co-ordination at the European level, restricting their value to other Member States.

Some of the consultation respondents indicate that significant progress has been made as a result of voluntary initiatives at the local level, where sustainable tourism is better achieved through local action. These may address issues such as developing multi-stakeholder processes (encouraged under Local Agenda 21), promoting sustainable mobility (for example, promotion of car-free tourism in Salzburg, Austria (UN, 2002)) and respecting cultural heritage and environmental carrying capacity (promoted by specific actions and investment by the Greek National Tourism Organisation (UN, 2002)). Many global organisations also aim to encourage action

for tourism managers and local authorities. Such initiatives may advocate ensuring community well-being or achieving integration and coherence between approaches. However they may be too high-level and general to encourage uptake by local stakeholders, hence Option B does not tend to address these criteria.

Significant issues such as better governance, seasonality and sustainable transport are addressed only to a very limited degree by existing initiatives, since these issues require a level of co-ordination that is likely to be beyond the competencies of individual stakeholders. Thus while environmental and social issues are addressed to some extent, economic issues related to the quality of supply are rarely considered. This will, in turn, lead to a degradation of the environmental and cultural environment as enterprises concentrate their efforts on attracting customers.

Existing initiatives may focus on one aspect of sustainability, with potential for conflicts with other objectives due to their uncoordinated approach. For example, local actions that aim to manage tourist numbers with to respect the environmental carrying capacity may shift tourism to other destinations where tourism is not managed sustainably, increasing concentrations and thus exacerbating negative trends. Where eco-taxes have been proposed to raise revenue for coastal protection and, therefore, to take account of carrying capacities, this may make tourism less accessible to those on lower incomes. On the other hand, measures to make tourism available to all could result in increasing volumes of tourism activity and further exploitation of natural and cultural resources beyond carrying capacities.

Whilst the impact of individual initiatives 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. One reason why existing initiatives may currently be unsuccessful is that many have been implemented relatively recently and may not have yet reached their full potential. Thus, over time, Option B could prove to be more effective. However, it is unlikely that, even in the long term, issues of better governance, seasonality, sustainable transport, etc., can or will be addressed by individual stakeholders.

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 voluntary nature of existing initiatives means that they could end at any time and with no alternative approach in place.

5.6   Assessment of Option C: Relying on Established Contributions

Option C consists of using the existing range of initiatives by other stakeholders (discussed in Option B) in a more systematic and targeted way by greater involvement of the European Community. At the same time, the Commission will promote the integration of the sustainability of European tourism into established Community measures. As Option C builds on Option B, this Section focuses on the additional contribution of Commission measures identified in Box 5.2, which are analysed in Annex 3. The overall impact of Option C, taking into account the contribution of existing initiatives, is summarised in the Assessment Summary Table (Table 5.2).

Box 5.2: Commission Initiatives affecting Tourism	
• Eco-label (2003) • Integrated Product Policy (2003) • Plan eEurope 2005 (2002) • 6th Environment Action Programme, Environment 2010 (2002) • The White Paper European Transport Policy for 2010 (2002) • Commission Communication on Corporate Social Responsibility (2002) • European Governance and Better Regulation (2001)	• A European Union Strategy for Sustainable Development (2001) • European Landscape Convention (2000) • European Charter for SMEs (2000) • Culture 2000 (2000) • Integrated Coastal Management Zones (2000) • Structural Funds (2000-2006) • The Cardiff Process (1998) • The Lisbon Process (1998) • EMAS (1995) • Bathing Water Directive (1976)

Option C provides additional benefits to Option B in those areas where a higher level, co-ordinated approach is needed to address the issues more effectively. 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, most significantly through structural funds, and environmental protection is promoted through a large number of European policies. In addition, the introduction of an EU eco-label for tourism accommodation in 2003 may also provide additional benefits, improving consumer awareness, but it is to soon to assess the benefits of this European action.

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 integration and coherence of policies and approaches at lower levels. In addition, a key issue for the competitiveness of the tourism industry, and thus economic sustainability, is the availability of skilled and qualified staff. The effect of seasonality is a significant influence on this issue, although factors may also affect it, and thus measures to increase the skills of the European workforce in general are unlikely to be successful in the tourism sector without addressing seasonality.

Option C provides some additional economic, social and environmental benefits compared to Option B, but many of the existing initiatives are too broad for their impact on tourism to be assessed with any accuracy. Instead, they provide a co-ordinated approach to issues that would otherwise be addressed in isolation at the local level, for example transport. As with Option B, many of the initiatives are relatively new and thus greater benefits may arise from these actions at some time in the future. At present, however, Option C represents the current situation, and trends would suggest that the existing framework is not sufficient to make adequate progress towards the sustainability of European tourism.

5.7   Assessment of Option D – Reinforcement of Existing Framework

Option D consists of the reinforcement of the existing framework for action, by supporting existing initiatives and filling the gaps left by these initiatives. The Commission thus proposes a series of eight measures, which are described in the

additional contribution of Commission measures identified in the consultation document. The consultation responses commented on the suitability of these measures and these responses are analysed in Annex 4. These responses have informed completion of the table in Annex 3, which is summarised in Table 5.2.

Through reinforcing the existing framework, Option D provides additional benefits related to the majority of criteria. These generally result from a greater degree of co-ordination, increasing the effectiveness of action and potentially achieving the benefits sooner than might occur under existing initiatives. A good example of this is Measure 5, which aims to develop consumer awareness. Although there is some evidence of 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 in a shorter timeframe than may otherwise be expected.

Specific measures under Option D to address seasonality provide the best opportunity to reduce the unsustainable trend in tourism activity. However, it should be noted that this trend is driven by strong forces, such as climate and lifestyle, which may be beyond the control of the Commission. It is therefore important that such measures are undertaken in parallel with measures to raise consumer awareness to ensure the best possible chance of improvements. Similarly, measures to address sustainable inter- and intra- destination mobility will also need to be combined with those to improve consumer awareness to ensure that the main impacts are addressed.

Measure 7, which aims to address sustainable destination development, could provide a range of economic, social and environmental benefits through supporting industry, the local community and the environment. It would assist the identification of specific local impacts (which may be to air, water, land or local communities) that may not be specifically addressed by stakeholder initiatives (under Option B) or existing Community policies (under Option C). In this way, Option D provides flexibility to address the regional diversity of the tourism sector, and enables individual solutions to be found for destination challenges.

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 the operational aspects, such as better governance, and environmental aspects of sustainability rather than the social aspects. 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 would substantially improve this Option and its likelihood of achieving progress towards sustainable tourism.

5.8   Comparison of Options

Data Availability

Precise, quantitative data on the impacts of European tourism is lacking. Stakeholders stressed the importance of specific data collection to meet the needs of the tourism industry and the wider community. However, there is strong agreement amongst stakeholders that the challenges outlined in Section 2 represent real risks, and on the need for action, given that the challenges are already present. Therefore, better data may facilitate more targeted implementation at the destination level, and enable effective monitoring of the policy impacts by providing a baseline, but would be unlikely to alter the assessment of the overall policy impacts.

Principle of Subsidiarity

Option B respects the principle of subsidiarity to the greatest degree, allowing stakeholders to address the specific challenges of sustainable tourism in the most appropriate manner for their situation. However, Options C and D facilitate and support continued stakeholder action, thus still observing the principle of subsidiarity. Option A has the potential to reduce the potential for decision-making at local level and may thus conflict with the principle of subsidiarity.

Principle of Proportionality

The significance of the tourism sector, in terms of its economic, environmental and social impacts would justify action by the Commission on the grounds of proportionality. Thus Options C, D and A meet this requirement. Option B, which leaves responsibility for progress with the stakeholders, risks the possibility of no action being taken to address significant issue, not adequately reflecting the importance of the tourism sector at EU level.

Impacts over Time

There is general agreement that the challenges discussed in Section 2 are already being experienced. Growth in European tourism, even if it does not reach the levels predicted in international forecasts, is likely to increase the pressures on environmental and social resources. In addition, it can not be assumed that the growth would automatically result in economic sustainability, which is related to the profitability of enterprises rather than simply to numbers of tourists. Thus it is important that action is taken in the short to medium term, as well as ensuring continued support in the longer-term.

Implementing Option A may detract resources from addressing challenges in the short to medium term, and in the longer term may restrict the stakeholder and Community actions currently in operation. However, it is likely that a comprehensive policy will provide continued support for the tourism industry and reflect its contribution to the European economy in the long term.

tourism but current trends suggest this is likely to be limited. Continued development and effective implementation of these actions may result in improvements in the medium-term, but this is uncertain. The degree of uncertainty increases in the longer term since, under Option B, voluntary initiatives may be withdrawn for a variety of reasons. Under Option C, other sectors may dominate the development of Community policies, so that they may pay insufficient attention to the tourism industry.

Option D provides support to existing actions in the short-term, to ensure their continued development and immediate consideration of the challenges faced. The measures proposed include those that can be implemented in the short-term, such as preparing an action plan and proposing co-operation agreements with the WTO, and which will provide a basis for progress towards sustainable tourism in the longer term. The iterative approach proposed by Option D, of reinforcing stakeholder initiatives, maximising the effect of Community policies, and implementing specific measures, could minimise the demand on stakeholder resources (including those of the Commission), allowing prioritisation and flexibility to ensure that the challenges are addressed at the most appropriate time.

Conflict between Impacts

Given that all the options are aiming to address the same challenges, all experience the same areas of conflicts, 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.

None of the Options propose to restrict the overall growth in tourism, rather the aim is to manage it more effectively. In this respect addressing the issues of seasonality and carrying capacity are vital to reducing the negative impacts of the growth in tourism (which is a positive social and economic impact). Given that Option D is most likely to address these issues, it is also most likely to minimise conflict between economic, environmental and social impacts within the shortest timescale. Option B and C could potentially address carrying capacity through various environmental initiatives, but the speed of tourism growth is such that uncoordinated initiatives are unlikely to cope with the additional pressures.

Impacts on Specific Groups

The analysis suggests that there are three specific groups that may be affected differently by the Options. SMEs are dominant in the tourism sector, but may currently lag behind larger companies in terms of their use of new technology and communication, may experience greater staffing problems, and may pay less attention to the environmental and social impacts of their activities. All these factors may reduce the quality of the service offered and thus competitiveness. In contrast, 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. Options B and C, which rely on the existing framework are unlikely to address these factors, and may restrict the competitiveness of SMEs, since

larger, global brands. Options B and C, which rely on the existing framework are unlikely to address these factors, and may restrict the competitiveness of SMEs, since the diversity of tourism enterprises requires a more focused approach. Option D proposes additional measures which will assist SMEs in meeting consumer demands for quality, but measures to address employment and IT issues could be further developed with particular attention to the needs of SMEs. Option A could provide the regulatory support to ensure the effectiveness of such action.

Local communities are also significantly affected by tourism activities. Although tourism provides economic benefits, social discontent may arise from poorly-managed mass tourism, especially where this may be disrespectful of local cultures. Current trends will exacerbate these issues, and thus Options B and C are unlikely to address the negative impacts on local communities. Option D incorporates measures to address sustainable destination development and management which will facilitate an improved social environment for local communities, particularly through multi-stakeholder process which will seek to involve communities to a greater extent than at present. These issues could be addressed via a variety of approaches, which should be determined at the destination level. Therefore Option A may constrain the flexibility required.

Disabled people represent 10% of the EU population, but current levels of accessible tourist facilities restrict their potential for travel. Only through greater consideration of corporate social responsibility, and actions to improve access, advocated under Option D can the current situation be addressed.

In addition, measures to manage tourism patterns, and particularly transport options, may disproportionally affect peripheral regions. For example, Ireland's tourism industry has benefited significantly from the increase in cheaper air travel. Thus any measures that would discourage or restrict air travel would impact heavily on the economy of Ireland and other peripheral regions. This example emphasises the need for a flexible approach which recognises the diversity of the European tourism industry. This diversity is most strongly emphasised by Options B and D.

Impacts outside the EU

Measures taken to increase consumer awareness within the EU, and encourage more sustainable behaviour will benefit all tourist destinations, whether they are in the EU, Accession Countries or developing countries. Options A and D are equally likely to increase consumer awareness and thus benefits to other countries will be greatest under these options.

Submissions to the UN (2002) suggest that many of the Accession countries are already aware of issues relating to sustainable tourism, however particular emphasis is place on the economic and environmental aspects, with less consideration of social impacts. Crauser (1998) suggests that the development through tourism of the rich cultural and natural heritage of these countries can make it possible to consolidate the economies of central and Eastern European countries and thus facilitate their integration into the European Union. Indeed, several Accession countries appear to following the path of natural and cultural based tourism, and data suggests that the

accounted for 81% of CEE arrivals (EEA, 2003). However, a lack of sufficient infrastructure and most significantly adequate public transport networks (particularly in rural areas) limit the potential for sustainable tourism.

Therefore, Option C, which assists with infrastructure development through the distribution of structural funds may facilitate progress towards sustainable tourism for the Accession countries after enlargement of the European Union. However, Option D, which aims to maximise the contribution of existing policies, may be more effective in this respect. As previously discussed though, Option D proposed limited additional action to ensure the provision of sufficient infrastructure, thus specific measures which could be envisaged under Option A may ensure that this aspect is addressed.

Measures under Option D, which aim to manage tourist patterns, may shift tourism elsewhere. It is possible that this may shift tourism to places that do not address sustainable tourism, including destinations outside the EU, thus increasing pressures on vulnerable destinations. It is difficult to assess the degree to which this might occur.

5.9 Conclusions

Table 5.4: Summary of Policy Impacts (see Table 5.3 for key)				
	Policy Option			
	A	**B**	**C**	**D**
General Political Compatibility and Acceptability				
Requirements of subsidiarity	?	++	++	+
Requirements of proportionality	++	?	+	++
Efficiency	?	?	+	++
Effectiveness	?	?	+	++
Consistency	?	?	++	++
Minimising conflicts	++	?	+	++
Sustainability Effects				
Positive economic impacts	++	?	+	++
Positive environmental impacts	++	+	+	++
Positive social impacts	++	?	+	+
Specific Impacts				
Minimising constraints on stakeholders	?	++	++	+
Reducing inequalities of impacts on specific groups	+	?	?	++
Positive impacts outside the EU	++	?	+	++
Timeframe for Impacts				
Positive impacts in the short-term	?	+	+	+
Positive impacts in the medium-term	+	+	+	++
Positive impacts in the long-term	++	?	+	++

The analysis shows that Option D performs best across the range of specific sustainable tourism criteria (Table 5.2) and more general requirements (Table 5.4). Significant areas of weakness that can be most easily addressed relate to the consideration of social aspects, for example employment conditions in the tourism industry, and local community/cultural based challenges.

6. MONITORING AND EVALUATION OF POLICY IMPACTS

6.1 Overview

Monitoring and evaluation of the impacts of the policy will require the use of indicators of sustainable tourism. These indicators will enable the success of the policy in meeting its overall aim to be judged. Without a system of indicators it would not be possible to evaluate whether the intended results have been achieved (ARPAER *et al.*, 2003).

Indicators are defined as "*observed values representative of a phenomenon to study ... indicators simplify information that can help to reveal complex phenomena*" (EEA, 2003). Indicators must be relatively easy to monitor but informative enough to assist future policy development. The impacts of tourism have generally been measured through the use of economic indicators, including annual tourists arrivals, employment generated, foreign exchange earning, number of guest nights and contribution to GDP (Ellul, 2002). Although these indicators are important they do not measure the full impact of tourism.

A range of indicators for sustainable tourism is therefore being developed. The European Environmental Agency (EEA) has established some key indicators and is working to develop a 'Tourism and Reporting Mechanism'. The WTO has identified a range of indicators (WTO, 1996). Other indicators are also available; the English Tourism Council (ETC), for instance, has developed a set of 20 national sustainable tourism indicators to help measure the progress towards making tourism more sustainable.

6.2 Indicators for the Proposed Communication

Indicators must reflect, to the extent possible, the full range of impacts of tourism and have a have a clear relation to the policy objectives. In addition, the indicators must be easy to understand and be meaningful to the stakeholders involved. Table 6.1, brings together existing indicators, assigning them to the different analysis criteria used in Section 5. In selecting the indicators, the OECD framework of Pressure-State-Response has been taken into consideration[2].

The indicators below are an illustrative list; we recommend that the Commission works with stakeholders, for example the proposed European Multi-stakeholder Monitoring and Steering Group for Tourism Sustainability to identify a suitable range of indicators. These should consist primarily of measures for which information is either currently available (e.g. from Eurostat or national sources) or can be gathered in a cost-effective manner.. As noted in the literature (ARPAER, 2003), the development of a common set of indicators for destinations would allow benchmarking, thus aiding the assessment of policies.

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[2] This refers to the pressure on the environment; the state of the environment and the response towards environmental pressures or changes to the state of the environment.

Table 6.1: Indicators for Sustainable Tourism	
Group I	
Developing consumer awareness	• Existence of educational/information programs for the public • Motivation for travel (determined from surveys) • Percentage of adults taking holidays of less than 4 nights • Tourism travel by transport mode (to/at destinations) • Consumer satisfaction
Achieving integration and coherence between policies and approaches	• Percentage of local authorities with Tourism Action Plans • Proportion of relevant policies at EU level that contain reference to tourism
Developing transparent multi-stakeholders processes	• Percentage of local authorities with LA21 strategies that include sustainable tourism elements • Number of local meetings to discuss issues before policies are implemented
Developing monitoring systems and information dissemination	• Percentage of accommodation registered with quality assurance schemes • Percentage of tourism business with eco-labels • Number of destinations recording tourism statistics
Group II	
Reducing seasonality	• Maximum population density (incl. residents and tourists) per km^2 • Spatial concentration (ratio of local population to annual number of tourists) • Temporal concentration (ratio of peak season to total number of tourists) • Spatial/temporal concentration (ratio of local population to peak season tourists) • Ratio of activities available in off season period to activities offered at peak time
Sufficient provision of infrastructure	• Indicator of accommodation capacity • Road network availability • Waste management facilities
Increasing access to tourism for all citizens	• Percentage of accommodation registered as meeting accessible scheme criteria for disabled people • Percentage of destinations providing information on accessibility • Household consumption expenditure on tourism activities
Promoting inter- and intra-destination mobility	• Transport used by residents on holiday trips • Transport used to destination • Percentage of accommodation, tourist facilities, accessible by public transport
Group III	
Increasing the availability of skilled, qualified staff for tourism sector	• Percentage of total workforce employed in tourism • Percentage of employees that possess tourism qualifications • Seasonality of employment and length of contract • Ratio of average hourly earnings in tourism to the average national hourly wage
Use of quality and environmental management tools	• Number of businesses signed up to environmental management schemes • Number of businesses signed up to quality management schemes
Use of new information and communication technology	• Percentage of tourism businesses using new technology for informing tourists • Conferences and other activities attracting interest in tourism research organised locally
Group IV	
Ensuring community well-being in destinations	• Audit of community perception of tourism at destinations • Proportion of tourist destinations with plans for ensuring community well-being • Unemployment rates in off-season periods • Number of retail establishments/number of establishments serving local community needs • Number and type of complaints by locals • Number and types of crimes against tourists reported
Respecting and maintaining the diversity of cultural heritage	• Percentage of local authorities with tourism strategies that incorporate cultural and heritage considerations • Ratio of the land and historic buildings protected by national agencies against the amount of money spent on protection of these assets
Respecting environmental carrying capacity	• Number of schemes/policies protecting critical ecosystems • Energy, water or territory consumption • Number of beaches with Blue Flag and a Seaside Award • Number of Biodiversity Action Plans signed up by tourism businesses • Implementation of EIA procedures for analysing the impact of new development
Sources: WTO (1995) in Assembly of European Regions (1998); EEA (2003b); ETC (2002); and Farsari *et al* (1999)	

4. TECHNICAL SPECIFICATIONS

4.1. DESCRIPTION OF WORK

4.1.1. Aim of the action

The broad aim of the action of which this contract forms part is to identify and assess the problems at stake and the objectives pursued regarding 'Basic orientations for sustainable tourism in Europe' and the impact of the main policy options available to achieve the main objective to be reached with a Commission Communication on this subject and the policy developed in it. The impact assessment has to analyse the main options for achieving the objectives and their likely impacts. It has to outline the advantages and disadvantages of each option as well as synergies and trade-offs.

The impact assessment will help the Commission to increase transparency, communication and information when adopting its Communication and thus will make it easier to justify the outlined policy option chosen to all tourism stakeholders.

4.1.2. Subject of the survey

The Commission calls for tenders for carrying out a study to assist the assessment of the positive and negative impacts expected from the different policy options identified with regard to Commission basic orientations for the sustainability of European tourism.

4.1.3. Aim of the study and work programme

The aim of the study is to improve the quality of the Commission Communication and its proposal for action and to ensure an analysis of their economic, environmental and social impacts.

It will

- assess systematically all the likely impacts of the Commission proposal and should help ensure consistency between Community policies and deliver sustainable development.

- lead to proposals that not only tackle the problem they aim to solve but also take into account side effects on other policy areas.

- result in Commission proposals based on a clear analysis of the impacts of the most significant possible alternatives.

- adapt the level of analysis to the likely impact of the initiative being examined (principle of proportionate analysis). In other words, the amount of work and the depth of the analysis for the impact assessment should be balanced against the significance of the proposal concerned.

- be based on common sense and dialogue: the findings at one stage may identify the need for wider analysis, or, on the other hand, may prove that the case is sufficiently well-documented and that no further examination is needed

- take into account both short and long term considerations, being open-minded about the effects of more or less alternative policy options

- use existing knowledge and experience and consult interested parties and relevant experts, where appropriate, benefiting from their knowledge, for example to gather new information, verifying existing data or analyses, and considering the provisions needed for compliance and implementation.

- be written in a clear and concise manner, explaining the analysis performed and its findings in such a way that a non-expert can understand it. This should include an explanation of the underlying assumptions and the basis on which they were reached

- clearly and systematically present all the positive and negative impacts.

In order to achieve this, the study will take into account and critically review the results of previous work undertaken by the Commission (see 1.2) and by relevant international stakeholders. Its work programme will respect at least the following elements:

a) Verification of the issues/problems that the policy/proposal is expected to tackle. The study should examine the problem and its underlying causes, and in particular, what different groups are affected. It should present potentially unsustainable trends and, in particular, potential inconsistencies between the economic, environmental and social dimensions of the problem. The baseline work is to assess the impact of no action.

b) Review of the main objective that the policy/proposal is expected to reach. The plausibility in relation to general objectives identified in previous work undertaken should be examined. If relevant, it should be shown how the main objective and related general objectives identified in previous documents[2] link up to any previously established objectives in the same policy area or in other areas, including the policy objectives set out in the European Sustainable Development Strategy.

c) Verification, examination and review of the main policy options identified as being available to reach the main objective. The study should analyse the value of the different options, taking also into account those discarded. This should allow justifying how the options proposed will achieve the objectives of the proposal while satisfying the requirements of subsidiarity and proportionality, keeping in mind the attribution of competencies in tourism. For example, the proposal should rule out any provisions that go beyond the

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[2] Refer to 1.2 BACKGROUND OF THE CONTRACT (page 3) *High Level Group Report on Tourism & Employment*, report entitled *Towards a European Agenda 21 for tourism*, Commission Communication *Working together for the future of European tourism*.

Community competencies, or any illogical, unnecessary or excessive constraints on stakeholders. The study should also explain how the options perform in an efficient, effective and consistent manner.

d) Extensive and comprehensive description and analysis of the positive and negative impacts expected from the different options identified. This will be the core of the work to be undertaken. The study will show in detail the economic, environmental and social impacts of the Commission proposals, quantifying the impacts wherever possible. Uncertainties about the scale of impacts, including the sensitivity of the results to changes in important variables, should also be reported. It should clearly describe any potential conflicts or trade-offs between different policy areas, and highlight any particular adverse impacts on specific social groups, sectors or regions, including impacts outside the EU, such as in developing countries. It should also look at factors that could impact on compliance with the proposal.

e) Suggestion and examination of ways how to monitor and evaluate the results and impacts of the proposal after implementation. The study should deal with the arrangements for monitoring the implementation of the proposal and its impacts. It should discuss the indicators that will be used, and how the information needed will be collected, as well as the procedures for evaluating the proposal, including the timing of the evaluations, their focus, and responsibility for their organisation. Finally, it should examine how the outcome of monitoring and evaluation would feed back into policy.

f) Presentation, summary and assessment of the results of any consultation held with tourism stakeholders. It should indicate how they were organised, who was invited to take part and what views were expressed. It should comment the results and indicate how the consultation influenced the development of the proposal, and any remaining critical or dissenting opinions.

The Commission intends to ensure general supervision and guidance of the work to which the study refers, in the framework of (i) a Commission Inter-departmental Steering Group (ISG) and (ii) of an external steering group that includes Member State representatives, other stakeholders experts designated by the Commission and representatives of relevant Commission services. During the duration of the tasks, it is planned to hold two meetings of the ISG and two meetings of the external steering group, in Brussels. The contractor shall ensure the participation of a maximum of 2 representatives in the meetings of the external steering group and in the meetings of the ISG. The contractor will draw up and forward to the Commission within two weeks following a meeting of the external steering group, detailed minutes of the meeting in question.

Furthermore, the contractor will be asked to follow the Commission's invitation to present the results of the finalised study in Brussels.

4.2. METHODOLOGY

This study is undertaken within the context of the White Paper on European Governance (COM(2001) 428 final of 25.7.2001), in the follow-up of which the

Commission approved the Communication on Impact Assessment (COM(2002) 276 final, of 05.06.2002) outlining that "impact assessment is intended to integrate, reinforce, streamline and replace all the existing separate impact assessment mechanisms for Commission proposals."

The study should respect the above mentioned Commission Communication on Impact Assessment (see Annex 5.5) as well as the Internal Guidelines on the new Impact Assessment procedure developed for the Commission services (see Annex 5.6). In particular, it should identify:

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

- 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. Description in qualitative terms and quantified as far as possible. Monetarisation may be used where appropriate.

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

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

- What are the impacts over time?

- What are the results of any scenario, risk or sensitivity analysis undertaken?

The results of the study need to be presented in a transparent and understandable way to provide the basis for a political discussion on the relative advantages and disadvantages of the relevant options. In presenting the analysis, this should be done in a way that:

- presents each option, rather than a single "take it or leave it" choice, highlighting the differences in impacts between each option, and between more or less ambitious variants of the same option;

- gives a clear and transparent summary of the positive and negative impacts of each option, that is, the benefits and costs to society. Impacts should be given in qualitative, quantitative and monetary forms where possible and proportionate;

- displays aggregated and disaggregated results. For example, the results of a cost-benefit analysis should not be shown solely as the net difference between costs and benefits, but should show the individual impacts which make up the net outcome;

- states clearly the critical assumptions and uncertainties;

- shows clearly any distributional effects;

- shows how each option compares against the criteria of efficiency, effectiveness and consistency;

- summarises the other policy issues (stakeholder consultation, problem identification, etc);

- describes the data used, explaining why one set of data was preferred over another, whether the information has been validated, and what are its strengths and shortcomings;

- indicates the analytical methods used.

The study results must present all identified and estimated relevant impacts in a way that helps the Commission judge which option is best. The overriding principle should be to present, for the options being considered, all relevant positive and negative impacts alongside each other, regardless of whether they are expressed in qualitative, quantitative or monetary terms. Keeping this in mind, the main methodologies available to compare the impacts of different options are:

- cost-benefit analysis: compares costs and benefits expressed in the same units, normally money;

- cost-effectiveness analysis: compares the costs of achieving a given objective;

- multi-criteria analysis: compares costs and benefits expressed in a mixture of qualitative, quantitative or monetary terms.

The results should allow justifying the proposal to be adopted by the Commission:

- What is the final policy choice and why?

- Why was a more/less ambitious option not chosen?

- Which are the trade-offs associated to the chosen option?

- 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?

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

4.3. REPORTS AND DOCUMENTS

The Contractor is to provide the required reports and documents in accordance with the conditions of the standard service contract appended in Annex 5.4.

The contractor will provide the reports and documents requested in accordance with the conditions appearing in the attached standard contract. All numbers of pages refer to A4 size.

- A substantive **progress report** must be submitted to the Commission (Enterprise Directorate-General), in five typescript ready-to-print copies, no later than **four weeks** after the signature of the contract.

- The **final report** must be submitted to the Commission no later than **seven weeks** after the signature of the contract. The Commission shall have twenty days to approve or reject the documents, and the Contractor shall have ten days in which to submit new documents.

The reports must be submitted in an official EU language, preferably in English, together with a 4-page summary in English, French and German. The reports and the summaries have to be submitted as Word (.doc) documents.

The reports will be produced according to the provisions and process set out in the Commission Communication on impact assessment (COM (2002) 276 of 5 June 2002 (Annex 5.5) and the document available as Annex 5.6 of these Tendering Specifications.

The length of the progress report and the final report shall not exceed 30 pages each, including graphics and tables; the main supporting documents are to be attached as annexes.

The contractor shall provide five typescript ready-to-print copies of the final report and its annexes and of the three language versions of the executive summary, together with all pictures, charts and other materials necessary, ready for reproduction. In addition, these documents must be forwarded by e-mail, on floppy disk or on CD-ROM.

4.3.1. *The progress report must:*

- present the general framework for the study and a glossary describing the relevant terms that are to be used;

- describe the methodology used, including information on the references and data that are utilised and on their sources, on measures taken to ensure quality of the work, and on consultation made or foreseen;

- specify how the work was undertaken in respect of the agreed work programme;

- adequately present the results of the work undertaken with regard to the elements a) to c), and a first approach to the following elements, of the work programme set out under point 4.1, and explain the work undertaken and the approach chosen for the work ahead.

4.3.2. *The final report shall*

provide the Commission with the results of the studies and information for internal evaluation purposes, a part or all of which the Commission may want to publish. The contractor must address the following points:

- the methodology used, including information on the references and data that have been utilised and the sources of these, on measures taken to ensure quality of the work, and on consultation made;

- how the work was undertaken in respect of the work programme;

- the characteristics of the work undertaken (ideas; innovative elements; partnership; geographical extent; technical feasibility and likelihood of

findings being successfully transferred, positive and negative aspects experienced);

- the collaboration established during the course of the work (for example, involvement of public and private bodies; trade associations and authorities at local, regional and national level; experts, scientists and scientific bodies; etc.).

- the results of the work undertaken with regard to all elements of the work programme set out under point 4.1, and subsequent conclusions and recommendations.

Table A2.1: Summary of the Analysis of Objectives identified in the Literature Review

Policy/Strategic/ Programme Name	Objectives/messages relevant to Sustainable Tourism	How are they included in the objectives of the Communication?
European Union Contributions		
'Tourism and Employment' Process	Messages from European Conference on Tourism and Employment[*], Luxembourg European Council on Employment[**], Council of Ministers (Tourism)[***], conclusions and recommendations of the High Level Group on tourism and employment[****]: • the need to improve the quality and competitiveness of European tourism; • the need to help SMEs and promote partnerships at all levels; • the need to create a favourable environment for tourism; and • the need to improve the quality of human resources; Messages from the Report of the working groups[*****]: • the need to highlight the fundamental role of information, knowledge and its dissemination; • the need for competent human resources motivated by medium and long-term prospects; • the integration of environmental policy and the promotion of sustainable tourism; • the need for European harmonization of the concept of quality of tourism services and infrastructures, and its assessment and monitoring; • the need to speed up the integration of information society tools and services in all tourism activities and businesses, in particular SMEs; and • the need for a network of stakeholders involved and a generalized partnership, particularly those in the field to ensure implementation of all the recommendations.	• *"competitive quality development"* (pp. 6, para 1); • *"high-quality, competitive tourism"* (pp. 7, para 1); • *"Multi-partnership solutions (…)"*(pp. 6, para 5); • *"(…) adequate employment and learning opportunities"* (pp. 8, para 4); • *"(…) the use of innovation and new technologies where appropriate."* (pp. 8, para 4); • in what concerns the fundamental role of information, knowledge and its dissemination, it underlines the overarching aim of good governance. The communication does not explicitly mention it but it takes it into consideration in its proposal. The need for harmonization of the concept of quality is not addressed in the objectives.
"Working Together for the future of European tourism"	• *"to create the conditions and provide the basis for sustainable, high-quality tourism and competitive European tourism businesses"*; and • *"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"*.	• *"(…) while being commercially successful through a competitive quality development"* (pp. 6, para 1); • *"sustainable, high-quality, competitive tourism needs to respect the carrying capacity of its natural and cultural areas"* (pp. 7, para 1); • *"(…) adequate employment and learning opportunities (…)"*(pp. 8, para 4); • in what concerns improving the basic knowledge of

Table A2.1: Summary of the Analysis of Objectives identified in the Literature Review

Policy/Strategic/ Programme Name	Objectives/messages relevant to Sustainable Tourism	How are they included in the objectives of the Communication?
		the industry, the Communication does not refer to it explicitly but takes it into consideration under the Good Governance aim.
EU Strategy for Sustainable Development	- limit climate change and increase the use of clean energy; - address threats to public health; - manage natural resources more responsibly; - improve the transport system and land use management; - combat poverty and lack of social cohesion; and - deal with the economic and social implications of an ageing population.	*"needs to respect the carrying capacity of its natural areas (...)"* (pp. 7 para 1); *"requires de-linking economic profit from social and environmental cost"* (pp. 8 para 3); *"(...) conserving and restoring European coastal zones and mountain areas, protected areas and cultural heritage sites (...)"* (pp. 8 para 6); - the threat of growth of the transport system underlines the objectives of the Commission Communication proposal; but it is not explicit in relation to this issue. The issue of land management is also not clearly addressed. In the case of poverty and social exclusion, the Communication does not take these objectives into account.
6th Environment Action Programme Environment 2010: Our future, our choice	- emphasising climate change as an outstanding challenge and contributing to stabilising greenhouse gases concentrations; - 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; - 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; - 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;	*"conserving and restoring European coastal zones and mountain areas, protected areas and cultural heritage sites as the basis for destinations to be attractive and protecting the environment and natural resources(...)"* (pp. 8 para 6); - sustainable production patterns – section II, 3, pp 8; - sustainable consumption patterns – section II, 2, pp 7; - in what relates to the potential threats to human health and the sustainable development of urban environment, they are not considered explicitly in the Communication proposal.

Table A2.1: Summary of the Analysis of Objectives identified in the Literature Review

Policy/Strategic/ Programme Name	Objectives/messages relevant to Sustainable Tourism	How are they included in the objectives of the Communication?
The White Paper European transport policy for 2010: time to decide	• achieve a transport system that is more efficient, sustainable and of higher quality; and • "break the link gradually between transport growth and economic growth" and "shifting the balance modes of transport".	• although identified as a major challenge, the transport issue does not constitute an objective in its own right.
Commission Communication on Corporate Social Responsibility	• increase the knowledge about the positive impact of CSR on business and societies in Europe and abroad, in particular in developing countries; • develop the exchange of experience and good practice on CSR between enterprises; • promote the development of CSR management skills; • foster CSR among SMEs; • facilitate convergence and transparency of CSR practices and tools; • launch a Multi-Stakeholder Forum on CSR at EU level; • integrate CSR into Community policies.	• *"sustainable tourism production patterns mean that the sector's enterprises consequently implement the concept of corporate social responsibility amt its various elements (...)"* (pp. 8 para 4).
Global and International Contributions		
Agenda 21 for the Travel and Tourism Industry	Overall aim for the Government departments, national tourism authorities and representative trade organisations: • *"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."*	• the Commission Communication on sustainable European tourism constitutes the response to this aim.
WSSD Plan of Implementation	• *"fundamental changes in the way societies produce and consume are indispensable to achieve global sustainable development"*, it adds that this changes should be promoted by all countries, and should involve governments, relevant international organisations, the private sector and all major groups; • *"(...) 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.";* • the importance of the development of integrated water resources	• sustainable consumption patterns – section II, 2, pp 7; • sustainable production patterns – section II, 3, pp 8; • *"good public and private governance"* (pp. 6 para 4); • *"respects the limits of its resource base, and of those resources capacity to regenerate (...)"* (pp. 6 para 1); • *(...) creating wide societal and environmental benefit"* (pp. 6 para 1); • *"(...) competitive tourism needs to respect the*

Table A2.1: Summary of the Analysis of Objectives identified in the Literature Review

Policy/Strategic/Programme Name	Objectives/messages relevant to Sustainable Tourism	How are they included in the objectives of the Communication?
	• management in general; • 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*"; • the protection of the marine environment from land base activities (like tourism); • the importance of the protection and conservation of mountain environments; and • the importance of biodiversity and its protection and conservation. • "*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	• *carrying capacity of its natural and cultural areas (...)*" (pp. 7 para 1); • "*preservation of regional diversity (...)*"(pp. 8 para 6); • "*(...) considering community well-being in tourist destinations (...)*" (pp. 8 para 6); AND • "*(...) conserving or restoring European coastal zones and mountain areas, protected areas and cultural heritage sites (...)*" (pp. 8 para 6); • the Commission is not specific in terms of water, waste and chemicals management, however, given the overarching style of the proposal it would not be expected that this more detailed aspects of sustainable tourism would be referenced
Global Code of Ethics for Tourism	• "*(...) 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 (...)*"	• "*competitive quality development*" (pp. 6, para 1); • "*high-quality, competitive tourism*" (pp. 7, para 1); • "*Multi-partnership solutions (...)*"(pp. 6, para 5); • "*(...) adequate employment and learning opportunities*" (pp. 8, para 4); • "*sustainable, high-quality, competitive tourism needs to respect the carrying capacity of its natural and cultural areas*" (pp. 7, para 1); • "*(...) more tourists with special need that must be catered for to enable them to fully benefit from tourism (...)*".

Table 3.1: Option B – Assessment Table

Criteria Group	Group I				Group II				Group III			Group IV		
Criteria	Developing consumer awareness	Achieving integration and coherence between policies and approaches	Developing transparent multi-stakeholder processes	Developing monitoring systems and information dissemination	Reducing seasonality	Sufficient provision of infrastructure	Increasing access to tourism for all citizens	Promoting sustainable inter- and intra-destination mobility	Increasing the availability of skilled, qualified staff for tourism sector	Use of quality and environmental management tools	Use of new information and communication technology	Ensuring community well-being in destinations	Respecting and maintaining the diversity of cultural heritage	Respecting environmental carrying capacity
Austria		+		+				+	+	+				+
Belgium	+		+	+		+			+	+				?
Denmark				+						+			+	
Finland	+		+	?					+	+				
Germany	+		+	+						+			+	+
Greece	+		+	+					+	+				+
Sweden										+				
WSSD Plan of Implementation	+	+	+	+		+				+	+	+	+	+
Agenda 21 for the Travel and Tourism Industry		+	+	+				+	+		+	+	+	+
UN Commission on Sustainable Development's Decision on Tourism and Sustainable Development	+									+	+	+	+	+
Global Code of Ethics for Tourism	+	+	+	+			+		+	+	+	+	+	+
Guide for Local Authorities on Developing Sustainable Tourism	+	+	+	+		+	+	+			+	+	+	+
International Guidelines for Sustainable Tourism	+	+	+	+			+					+	+	+

Table 3.1: Option B – Assessment Table

Criteria Group	Group I				Group II				Group III			Group IV		
Criteria	Developing consumer awareness	Achieving integration and coherence between policies and approaches	Developing transparent multi-stakeholder processes	Developing monitoring systems and information dissemination	Reducing seasonality	Sufficient provision of infrastructure	Increasing access to tourism for all citizens	Promoting sustainable inter- and intra-destination mobility	Increasing the availability of skilled, qualified staff for tourism sector	Use of quality and environmental management tools	Use of new information and communication technology	Ensuring community well-being in destinations	Respecting and maintaining the diversity of cultural heritage	Respecting environmental carrying capacity
Tours Operators Initiative	+		+	+					+	+	+	+	+	+
Sustainable Tourism – Eliminating Poverty	+	+	+		+	+	+	+	+	+		+	+	+
What Tourism Managers Need to Know	+			+					+	+	+	+	+	+

Table A3.2: Option C – Assessment Table

Criteria Group → Criteria	Group I				Group II					Group III		Group IV		
	Developing consumer awareness	Achieving integration and coherence between policies and approaches	Developing transparent multi-stakeholder processes	Developing monitoring systems and information dissemination	Reducing seasonality	Sufficient provision of infrastructure	Increasing access to tourism for all citizens	Promoting sustainable inter- and intra-destination mobility	Increasing the availability of skilled, qualified staff for tourism sector	Use of quality and environmental management tools	Use of new information and communication technology	Ensuring community well-being in destinations	Respecting and maintaining the diversity of cultural heritage	Respecting environmental carrying capacity
The Cardiff Process		+	+	+						+	+		+	+
The Lisbon Process		+	+	+					+		+		+	+
6th Environment Action Programme Environment 2010: Our future, our choice	+	+	+	+						+	+		+	+
The White Paper European transport policy for 2010: time to decide	+	+	+	+	+/?	+		+		+	+			+
Commission Communication on Corporate Social Responsibility		+	+	+					+	+	+			+
A Sustainable Europe for a Better World: A European Union Strategy for Sustainable Development		+	+	+				+	+		+		+	+
European Landscape Convention	+	+	+										+	+
European Governance and Better Regulation		+	+											

Table A3.2: Option C – Assessment Table

Criteria Group Criteria	Group I				Group II				Group III			Group IV		
	Developing consumer awareness	Achieving integration and coherence between policies and approaches	Developing transparent multi-stakeholder processes	Developing monitoring systems and information dissemination	Reducing seasonality	Sufficient provision of infrastructure	Increasing access to tourism for all citizens	Promoting sustainable inter- and intra-destination mobility	Increasing the availability of skilled, qualified staff for tourism sector	Use of quality and environmental management tools	Use of new information and communication technology	Ensuring community well-being in destinations	Respecting and maintaining the diversity of cultural heritage	Respecting environmental carrying capacity
Enterprise policy – Euroepan Charter for SMEs									+		+			
Bathing Water Directive												+		+
Structural Funds						+			+	+	+			
Plan eEurope 2005	+			+			+				+			
Eco-Label	+			+						+				+
EMAS	+		+	+						+				+
Integrated Product Policy	+	+												
Culture 2000	+						+						+	
Integrated Coastal Zone Management	+	+	+	+										+

Table A3.3: Option D – Assessment Table

Criteria Group	Group I				Group II				Group III			Group IV		
Criteria	Developing consumer awareness	Achieving integration and coherence between policies and approaches	Developing transparent multi-stakeholder processes	Developing monitoring systems and information dissemination	Reducing seasonality	Sufficient provision of infrastructure	Increasing access to tourism for all citizens	Promoting sustainable inter- and intra-destination mobility	Increasing the availability of skilled, qualified staff for tourism sector	Use of quality and environmental management tools	Use of new information and communication technology	Ensuring community well-being in destinations	Respecting and maintaining the diversity of cultural heritage	Respecting environmental carrying capacity
Measure 1: Use the IAT to integrate sustainability concerns into Community policies and initiatives		+	+	?/+	?	?	?	?	?	?	?	?	?	?
Measure 2: Action Plan for enhancing the effect of Community policies/measures	?/+	+	+		?	?	?	?	?/+	?/+	?/+	?	?	?/+
Measure 3: Co-operation agreement with the WTO	?/+	?/+	+	?/+	?	?	?/+	?	?/+	?/+	?/+	?/+	?/+	?/+
Measure 4: European Multi-Stakeholder Monitoring and Steering Group	?/+	+	++	++	?	?	?	?	?	?	?	?	?	?
Measure 5: Reducing seasonality and sustainable tourism transport	++	+	+/++	+	++	+	+	++	+	+	+	+	+	+
Measure 6: Special measures for good governance and CSR	++	+/++	++	++	?/+	?/+	+	?/+	+	+	+	+	+	+
Measure 7: Special measures for sustainable tourist destination development and management	++	+/++	++	++	+/++	++	++	++	++	++	++	++	++	++
Measure 8: In addition to 6 and 7, promotion of information tools	++	+/++	+/++	++	+/++	+/++	+/++	+/++	+/++	+/++	++	+/++	+/++	+/++

A.4 SUPPORTING INFORMATION FOR THE ASSESSMENT OF OPTION D: ASSESSMENT OF MEASURES

A.4.1 Measure 1 – Impact Assessment

Under Measure 1, the Commission intends to use the Impact Assessment (IA) tool to integrate sustainability concerns into Community policies and initiatives affecting European tourism. The Impact Assessment tool will help to identify those initiatives likely to affect tourism and consultation with interested parties will also be undertaken.

The Internal Guidelines on the IA procedure developed for the Commission Services states that in undertaking an extended impact assessment a wide range of possible economic, environmental and social impacts should be considered as well as identify who is affected and when the different impacts will occur. Thus, any policy should be assessed in terms of the economic, environmental and social impacts on tourism policies.

Summary of Responses

Nearly all respondents have agreed with Measure 1 and only one is not very clear about the implications of such a measure in their locality. Another respondent has highlighted the need to coordinate different sectoral policies, with these including transport, competition, consumer protection, employment, agriculture and education. Stakeholders' participation is seen as crucial to the development of the measure, and some interest groups, have shown their willingness to participate in multi-stakeholder groups in order to apply the impact assessment tool. Another has highlighted that for this measure to be effective, channels of communication need to be improved. Finally, a trade association has stated that current approaches to the assessment of impacts, such as the Business Impact Assessment tool, do not facilitate the involvement of SMEs.

Assessment of Measure 1

Overall, the impacts of Measure 1 are highly uncertain as the actual social, environmental and economic impacts on tourism will depend on the actual initiative assessed. However, it can be assumed that, applied properly, application of the IA tool will maximise the benefits for sustainable tourism. It is also expected that, following the Commission's tradition on consultation, the measure will foster governance at all levels and facilitate integration and coherence between policy areas. It may also assist with the development of monitoring systems and information dissemination, but this may not always be relevant to sustainable tourism. It will be important to ensure that the views of, and impacts on, SMEs are properly addressed in this process.

A.4.2 Measure 2 – Action Plan

Measure 2 consists of an action plan for enhancing the effect of the various community policies and measures affecting European tourism to support the sustainability of the sector. The Action Plan will be the result of an open-coordination process and will emphasise policies and measures in order to face the challenges of sustainable tourism supply. A guide addressed to tourism stakeholders on support for sustainable tourism could complement the action plan.

Summary of Responses

Only one respondent disagreed with this measure on the basis of the principle of subsidiarity, i.e. there is no need for the EC to take action and coordinate stakeholders on the matter of sustainable tourism. Many respondents stated the need to involve all relevant stakeholders, with a special emphasis on local authorities and bottom-up approaches. The idea of developing guidance addressed to stakeholders has been welcomed.

Assessment of Measure 2

The success of measure 2 is highly dependent on the specific actions to be incorporated in the Action Plan. As such, it is not possible to assess in detail at this point in time the environmental, social and economic impacts on the different interested groups. However it can be expected to positively impact on criteria related to better governance, multi-stakeholder involvement, and consumer awareness of sustainable tourism (especially if complementary guidance is developed) and also carrying capacity analysis. The suggested emphasis on a sustainable supply chain and issues related to the natural resource base would obviously benefit these areas.

A.4.3 Measure 3 – Co-operation Agreement with WTO

Under Measure 3, the Commission reach a cooperation agreement with the World Tourism Organisation in the field of sustainable tourism. The Commission will also favour the involvement of Member States, of the tourism industry and civil society groups concerned and any other appropriate stakeholder.

Summary of Responses

Some respondents are hesitant about the effectiveness of this measure, as based predominantly on liaison between the Commission and WTO. Other organisations have been highlighted as having a significant role in sustainable tourism, with this including UNEP and UNDP. Other European organisations, e.g. the Council of European Municipalities and Regions and the European Travel Commission, as well as local authorities are said to merit further consideration.

Assessment of Measure 3

The impacts of Measure 3 are, at this point in time, difficult to determine. The Commission highlights under Option B that a non-action scenario will rely on existing contributions, with this including initiatives by the WTO, which are deemed by the Commission of limited efficiency. A cooperation agreement could enhance the effectiveness of WTO guidance on issues such as monitoring and the use of indicators of sustainable tourism, where the WTO is already active. The overall process will also facilitate multi-stakeholder dialogue.

A.4.4 Measure 4 – Multi-Stakeholder Monitoring and Steering Group

Measure 4 consists of launching a European Multi-stakeholder Monitoring and Steering Group for Tourism Sustainability, which would be led by the European tourism industry, in cooperation with public stakeholders and civil society organisations. A detailed action framework with specific activities to the individual stakeholders would be agreed.

Among the tasks of the group is to develop a European-level System of Sustainability Monitoring and Reporting and to deliver an annual report on governance of Sustainable European Tourism. Work on sustainable tourism indicators would continue.

Summary of Responses

One respondent rejected measure 4, on the grounds that a steering and monitoring group will not bring added value. Overall, respondents agree with the formation of a steering group, although stakeholders' representation needs careful consideration. A number of conflicting comments were received regarding this aspect and the potential leadership of such a group. An alternative option highlighted by one respondent is to have each country reporting to a European Council, where governments from Member States are responsible for sustainable tourism within their boundaries. Overall, any group should have clear guidelines and objectives.

Assessment of Measure 4

It seems likely that Measure 4 will develop stakeholders' commitment to sustainable tourism, if all interested parties are represented in the group. This would imply, also, better levels of governance at all levels. Monitoring systems and information dissemination would be developed, which may in turn develop consumer awareness.

A.4.5 Measure 5 – Sustainable Consumption Patterns

Measure 5 consists of the Commission launching a wide-ranging initiative, involving all stakeholders, to further sustainable consumption patterns in Europe. This initiative will focus on the two core problems regarding sustainable consumer choices in leisure tourism, i.e. seasonality and sustainable tourism transport.

The Commission could also examine the possibility of promoting stakeholder initiatives, including those undertaken by the media, that aim at raising consumer awareness and developing sustainability thinking with regard to tourism activities.

Summary of Responses

Not all respondents agree with measure 5. Moreover, one respondent has stated the need for off-peak periods in order to allow nature time to recover. Another has stated that *it seems unnecessary to establish a round-table of stakeholders with a major influence and/or knowledge in this field. It is far better to establish an ad hoc group to set down the principles of best practise, which can be disseminated through information technology.* Overall, however, respondents agree that seasonality and transport are major challenges in achieving sustainable tourism and action to correct current trends, i.e. spatial concentration and increasing air travel, need to be dealt with.

Assessment of Measure 5

The impacts of Measure 5 are particularly related to patterns of consumption, namely seasonality and mobility to/at destinations. Other impacts are expected in terms of raising consumer awareness especially if a campaign is developed to raise public perceptions on the environmental, social and economic impacts of tourism concentration and less sustainable means of transport. Raising awareness is also at the core of respecting carrying capacities.

A.4.6 Measure 6 – Corporate Social Responsibility

Under Measure 6, the Commission would prepare and launch a package of special measures for promoting the principles of good governance and fostering Corporate Social Responsibility (CSR) practices through the tourism sector.

The measure will focus on the sustainable supply chain, with this including co-operation with the Tour Operators Initiative, setting-up a multi-stakeholder platform for implementing CSR and promoting sustainability reporting and transparency., and a communication and awareness campaign.

Summary of Responses

Measure 6 is generally welcomed. One respondent has, nevertheless, stated that the majority of leisure tourism and day excursion traffic in Europe does not go through tour operators, but is really a collection of many independent actions, in which case the UNEP statement has no direct relevance in much of the European context. In his opinion, *it would be better to work through national tourist board members of the European Travel Commission, which in turn has a network of regional or area tourist boards, to establish the principles of CSR.*

Assessment of Measure 6

Impacts from Measure 6 are expected to be positive for nearly all the assessment criteria provided that the principles of CSR are fully adopted and improve the social and environmental performance of the tourism industry. It is less certain that improvements will be achieved with regard to seasonality and transport which may be considered beyond the competency of individual enterprises.

A.4.7 Measure 7 – Sustainable Destination Development and Management

Measure 7 will consists of a package of special measures aimed at the promotion of sustainable tourist destination development and management, in which the following elements are to be included:

- co-operation with the International Council for Local Environmental Initiatives (ICLEI) to achieve a wide use of Local Agenda 21;
- co-operation in the development and refinement of carrying capacity analysis that respects the limits identified by competent bodies;
- setting-up a platform of European tourist destinations for sustainable tourist destination development and management;
- implementing a comprehensive communication and awareness campaign; and
- dissemination of best practice.

Summary of Responses

The issue of carrying capacity analysis is of general concern to the respondents, although one respondent has stated that the measure should include more specific targets and action, whereas another has stated the need to co-operate also with environmental and cultural heritage NGOs. It was also suggested to consider the concept of resource efficiency together with sustainability and quality, in order to highlight the cost-saving potentials within sustainable tourism development.

Assessment of Measure 7

Measure 7 takes into consideration the range of challenges of sustainable tourism, with special regard to governance and stakeholder involvement and commitment to sustainable tourism by means of a wider use of Local Agenda 21 processes. Quality issues (Group C) are also emphasised.

A4.8 Measure 8 – Use of Information Tools and Networks

Measure 8 will be an add-on to Measure 6 and 7, consisting of the use of information tools and networks targeting 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.

Summary of Responses

Overall, respondents agree with the importance of disseminating information on good practice. One respondent has stated the need to supplement Measure 8 with training events and programmes giving stakeholders a chance to meet and exchange information face-to-face.

Assessment of Measure 8

Additional positive impacts expected from the implementation of Measure 8 are related to the use of information technologies as well as monitoring systems.

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EXECUTIVE SUMMARY

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1.   Background

Tourism is one of the major economic sectors in the EU, contributing an estimated 5.5% to Community Gross Domestic Product (GDP) as well as having significant secondary economic effects. Tourism affects society in many different ways, and relates to issues such as employment, regional development, environment, consumer protection, health, safety, transport, taxation and culture.

The European Commission's legislative and work programme for 2003 foresees a Commission Communication on 'Basic orientations for the sustainability of European tourism'. The broad aim of the Communication is to show what approach and action is required to promote the sustainability of European tourism, how the European Community can contribute to the sustainability of European tourism and to provide stakeholders with basic orientations on the way to implementing sustainable tourism.

In preparation for the Communication, the Commission launched a consultation document to gather the views of all interested stakeholders. The Commission also selected the proposed Communication as one of 42 proposals for extended impact assessment. Risk & Policy Analysts Limited (RPA) has been commissioned to undertake a study to assist the extended impact assessment of the Communication.

2.   Verification of the Challenges of Sustainable Tourism

Cross-border tourist arrivals at European destinations are predicted to double by 2020. Whilst increasing volumes of tourism can bring economic benefits to the industry and to tourism destinations and may be a sign of social development and associated benefits for tourists, they can also cause negative effects.

The Commission emphasises the potentially unsustainable current trends of seasonality and transport. These will have negative impacts on all stakeholders through impacts on the resource base on which tourism depends. The lack of investment in infrastructure, which is related to the need for more sustainable transport networks, is highlighted as limiting growth (and is considered to be a major challenge by some stakeholders). Additional provision of infrastructure may conflict with environmental objectives.

The review of the existing data on tourism patterns and responses to the consultation have thus verified the challenges identified. Stakeholders also believe that greater consideration should be given to the challenge of protecting the cultural and natural resources on which tourism depends.

3. Review of the Main Objective

The aim of the proposed Communication is **to promote further progress towards the sustainability of tourism in Europe and world-wide**. Its objective is to achieve this aim by stimulating multi-stakeholder efforts, which span across all territorial and administrative levels, and to outline how the Community and the other stakeholders can further contribute to them.

The consultation document incorporates the majority of objectives set out in previous relevant EU policies, as well as those at an international level. However, specific objectives may gain from clearer identification to ensure that adequate consideration is given to all aspects of sustainable tourism. This applies in particular to certain environmental objectives related to transport, energy and land management, especially in view of the emphasis given to these by stakeholders.

4. Examination of the Policy Options

The consultation document identifies four policy options to reach the main objective of sustainable tourism:

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

The proposed policy options are all potentially feasible and all receive some support from stakeholders. All options build on the existing framework rather than presenting concrete operational mechanisms.

Option B and C are more in line with the principle of subsidiarity, whereas the principle of proportionality prevails in Option A and D. The level of resources needed in order to implement Option A and D will be considerably higher, although it seems more likely that these will meet the objectives of the proposal (since the first two options are less likely to reverse unsustainable trends in tourism).

5. Analysis of Policy Impacts

The nature of the issues and of the options presented means that quantification of the impacts is not feasible, thus techniques such as cost-benefit analysis and cost-effectiveness analysis can not be used. The assessment of the impacts is therefore based on Multi-Criteria Analysis (MCA). Criteria were developed for the analysis, as shown in Table 1. Each criterion should be measurable, in the sense that that it must be possible to assess, at least in a qualitative sense, how well a particular option is expected to perform in relation to the criterion.

Table 1: Criteria for Analysis		
Group	**Criteria**	**Challenges Addressed**
Group I	Developing consumer awareness	Tourism activity and behaviour
	Achieving integration and coherence between policies and approaches	All challenges
	Developing transparent multi-stakeholder processes	All challenges
	Developing monitoring systems and information dissemination	All challenges
Group II	Reducing seasonality	Concentration of tourism
	Sufficient provision of infrastructure	Economic investment in destinations
	Increasing access to tourism for all citizens	Tourism activity and behaviour
	Promoting sustainable inter and intra destination mobility	Transport
Group III	Increasing the availability of skilled, qualified staff for tourism sector	Competitiveness of supply
	Use of quality and environmental management tools	Competitiveness of supply; Use of natural resources and environmental protection
	Use of new information and communication technology	Competitiveness of supply
Group IV	Ensuring community well-being in destinations	Cultural environment; Economic investment in destinations
	Respecting and maintaining the diversity of cultural heritage	Cultural environment
	Respecting environmental carrying capacity	Use of natural resources and environmental protection

The assessment shows that Options A and D are most likely to achieve progress towards the sustainability of tourism in Europe and world-wide. However, substantial resources would be required to implement Option A, and this Option is not widely supported. Thus Option D is most effective in meeting the challenges of sustainable development, whilst respecting the principles of subsidiarity and proportionality.

6. Monitoring and Evaluation of Policy Impacts

A range of indicators for sustainable tourism has been reviewed to identify ways to monitor and evaluate the results and impacts of the proposal after implementation.

An illustrative list of indicators is provided. We recommend that the Commission works with stakeholders, for example the proposed European Multi-stakeholder Monitoring and Steering Group for Tourism Sustainability to identify a suitable range of indicators. These should consist primarily of measures for which information is either currently available (e.g. from Eurostat or national sources) or can be gathered in a cost-effective manner. As noted in the literature (ARPAER, 2003), the development of a common set of indicators for destinations would allow benchmarking, thus aiding the assessment of policies.

ZUSAMMENFASSUNG

1.   Hintergrund

Tourismus ist einer der großen ökonomischen Sektoren in der EU und stellt ca. 5,5% des Bruttoinlandsprodukts der europäischen Gemeinschaft dar sowie Haben der bedeutenden ökonomischen zweitenseffekte. Es ist eine Aktivität, welche auf unterschiedliche Weise Auswirkungen auf die Gesellschaft hat, und Themen, wie z.B. Beschäftigung, regionale Entwicklung, Umwelt, Verbraucherschutz, Gesundheit, Sicherheit, Transport, Steuern und Kultur umfasst.

Das Legislatur- und Arbeitsprogramm der europäischen Kommission für 2003 sieht ein Kommuniqué der Kommission über eine „Basisorientierung für die Nachhaltigkeit des europäischen Tourismus" vor. Das breitgefächerte Ziel dieses Kommuniqués ist es, zu zeigen, welcher Ansatz und welche Handlungen zur Förderung der Nachhaltigkeit des europäischen Tourismus erforderlich sind, wie die Europäische Gemeinschaft zur Nachhaltigkeit des europäischen Tourismus beitragen kann, und Interessengruppen eine Basisorientierung für die Umsetzung eines nachhaltigen Tourismus zu bieten.

Bei der Vorbereitung für dieses Kommuniqué hat die Kommission ein Konsultationsdokument veröffentlicht, um die Meinungen aller involvierten Interessengruppen zu erforschen. Die Kommission hat das zukünftige Kommuniqué ebenfalls als einen von 42 Vorschlägen zur erweiterten Beurteilung der Auswirkungen ausgewählt. Risk & Policy Analysts Limited (RPA) wurde damit beauftragt, eine Studie zu erheben, um bei der Beurteilung der Auswirkungsbreite für die Erstellung des Kommuniqués der Kommission behilflich zu sein.

2.   Bestätigung der Herausforderungen für nachhaltigen Tourismus

Der Zuwachs aus ganz Europa soll sich bis zum Jahr 2020 verdoppeln. Während mehr Tourismus ökonomische Vorteile für die Industrie und die Touristenziele bietet, und ein Zeichen für soziale Entwicklung und damit verknüpfte Vorteile für Touristen sein kann, kann es auch negative Auswirkungen für alle Interessengruppen haben.

Die Kommission weist darauf hin, dass die gegenwärtigen saisonbedingten Trends und die Trends hinsichtlich des Transports möglicherweise nicht nachhaltig sind. Diese Trends werden, aufgrund der Zerstörung der Basis an Ressourcen, von denen der Tourismus abhängig ist, negative Auswirkungen für alle Interessengruppen haben. Des weiteren wird auf den Mangel an Investitionen in der Infrastruktur, die mit der Notwendigkeit für ein nachhaltigeres Transportnetzwerk verknüpft ist, als begrenzt ausbaubar hingewiesen (dies wird von manchen Interessengruppen als wesentliche Herausforderung betrachtet). Eine zusätzliche Provision in der Infrastruktur kann einen Konflikt mit den Zielsetzungen im Umweltbereich hervorrufen.

Die Überarbeitung existierender Daten über Tourismusentwicklungsschemen und Reaktionen auf die Konsultation haben somit die identifizierten Herausforderungen bestätigt. Interessengruppen sind außerdem der Ansicht, dass mehr Rücksicht dem

Schutz der kulturellen und natürlichen Ressourcen, von denen der Tourismus abhängig ist, beigemessen werden sollte.

3. Übersicht über die Hauptzielsetzung

Das Ziel des vorgeschlagenen Kommuniqués ist, **weitere Fortschritte für einen nachhaltigen Tourismus in Europa und weltweit zu fördern**. Die Zielsetzung des Kommuniqués ist, zu diesem Zweck die Bemühungen von Multi-Interessengruppen anzuregen, welche alle territorialen und administrativen Ebenen umspannen, und darzulegen, wie die Gemeinschaft und die anderen Interessengruppen weiter hierzu beitragen können.

Insgesamt enthält das Konsultationsdokument einen Großteil der Zielsetzungen, die in der bisherigen, relevanten EU-Politik dargelegt wurden sowie jene Zielsetzungen auf internationaler Ebene. Spezifische Zielsetzungen könnten jedoch besser identifiziert werden, um zu gewährleisten, dass angemessene Überlegungen allen Aspekten eines nachhaltigen Tourismus zugemessen wurden. Das trifft insbesondere auf bestimmte Umweltzielsetzungen in Bezug auf Transport, Energie und Landmanagement zu, insbesondere hinsichtlich der Wichtigkeit, die diesem Aspekt von den Interessengruppen zugemessen wird.

4. Untersuchung der Politik-Optionen

Das Konsultationsdokument identifiziert vier Politik-Optionen, um der Hauptzielsetzung eines nachhaltigen Tourismus nachzukommen:

- eine umfangreiche, echte Gemeinschaftspolitik im Bereich Tourismus (Option A),
- ein Szenario, das keine Handlung erfordert (Option B),
- Verlässlichkeit auf etablierte Beiträge (Option C),
    - Aufbau auf die Aktivitäten anderer Interessengruppen,
    - Integration der Nachhaltigkeit des europäischen Tourismus in etablierte Gemeinschaftsmaßnahmen, und
- Bekräftigung und beste Nutzung der existierenden Rahmenbedingungen für weitere Handlungen (Option D).

Die vorgeschlagenen Politikoptionen sind alles möglicherweise durchführbare und alle empfangen etwas Unterstützung von den Interessengruppen. Aller Wahlbau auf dem vorhandenen Rahmen anstatt dem Darstellen der konkreten funktionsfähigen Einheiten.

Option B und C entsprechen eher den Prinzipien der Subsidiarität, wobei das Prinzip der Proportionalität bei den Optionen A und D vorherrscht. Die Maße an erforderlichen Ressourcen zur Umsetzung von Optionen A und D sind beträchtlich höher, obwohl es eher wahrscheinlich ist, dass diese den Zielsetzungen der Vorschläge entsprechen (da die ersten beiden Optionen weniger in der Lage sind, die nicht nachhaltigen Trends beim Tourismus umzukehren).

5. Analyse der Auswirkungen der Politik

Die Natur der Problematik und der präsentierten Optionen bedeutet, dass eine Quantifizierung dieser Auswirkungen nicht möglich ist, und dass daher Methoden, wie z.B. eine Analyse der Kostenvorteile und eine Kostennutzenanalyse nicht angewendet werden können. Die Beurteilung der Auswirkungen basiert daher auf einer Multi-Kriterien-Analyse (MCA).

Es wurden Analysekriterien, wie in Tabelle 1 dargestellt, entwickelt. Jedes Kriterium sollte messbar sein, insofern, dass es möglich sein muss, dieses Kriterium, zumindest qualitativ, zu bewerten, welche Leistungen eine bestimmte Option bezüglich dieses Kriteriums erbringen soll.

Tabelle 1: Analysekriterien		
Gruppe	**Kriterium**	**Herausforderungen adressiert**
Gruppe I	Entwicklung der Bewußtheit unter Verbrauchern	Touristische Tätigkeit und Verhalten
	Erreichung der Integration und Kohärenz zwischen Politik und Ansatz	Alle Herausforderungen
	Entwicklung eines transparenten Multi-Interessengruppen Verfahrens	Alle Herausforderungen
	Entwicklung von Überwachungssystemen und Mechanismen zur Verbreitung von Informationen	Alle Herausforderungen
Gruppe II	Reduzierung der Saisonalität	Konzentration von Tourismus
	Ausreichende Provision einer Infrastruktur	Ökonomische Investition in den Bestimmungsörtern
	Erhöhter Zugang zum Tourismus für alle Bürger	Touristische Tätigkeit und Verhalten
	Förderung einer nachhaltigen inter- und intra-Touristenzielmobilität	Transport
Gruppe III	Verfügbare ausgebildete, qualifizierte Mitarbeiter im Tourismussektor	Wettbewerbsfähigkeit des Versorgungsmaterial
	Nutzung von qualitativen und Umweltmanagement-Tools	Wettbewerbsfähigkeit des Versorgungsmaterial; Gebrauch von Naturresourcen und Umweltschutz
	Nutzung neuer Informations- und Kommunikationstechnologien	Wettbewerbsfähigkeit des Versorgungsmaterial
Gruppe IV	Gewährleistung des Wohlgefühls in der Gemeinschaft in den Touristenzielen	Kulturelles Klima; Ökonomische Investition in den Bestimmungsörtern
	Respektierung und Pflege des vielfältigen kulturellen Erbes	Kulturelles Klima
	Respektierung umweltbedingter Tragkapazität	Gebrauch von Naturresourcen und Umweltschutz

Die Beurteilung zeigt, dass Optionen A und D am ehesten einen Fortschritt zur Nachhaltigkeit des Tourismus in Europa und weltweit erzielen würden. Es würden jedoch beträchtliche Ressourcen für die Umsetzung von Option A erforderlich sein, und diese Option findet keine allgemeine Unterstützung. Option D ist daher am effektivsten hinsichtlich der Deckung der Herausforderungen für eine nachhaltige

Entwicklung und respektiert dabei gleichzeitig die Prinzipien der Subsidiarität und Proportionalität.

6. Überwachung und Auswertung der Auswirkungen dieser Politik

Eine Reihe von Indikatoren für nachhaltigen Tourismus wurden überarbeitet, um Mittel zur Überwachung und zur Auswertung der Ergebnisse und die Auswirkungen der Vorschläge nach der Umsetzung identifizieren zu können.

Eine detaillierte Liste der Indikatoren wird bereit gestellt. Wir empfehlen, dass die Kommission mit Interessengruppen zusammen arbeitet, z.B. der vorgeschlagenen europäischen *Multi-Stakeholder Monitoring and Steering Group for Tourism Sustainability*, um eine geeignete Reihe von Indikatoren identifizieren zu können. Diese sollten primär aus Maßnahmen bestehen, für die Informationen entweder momentan erhältlich sind (z.B. von Eurostat oder aus nationalen Quellen) oder welche auf kostengünstige Weise eingeholt werden können. Wie in den Unterlagen (ARPAER, 2003) kommentiert, würde die Entwicklung gemeinsamer Indikatoren für Touristenziele ein Benchmark ermöglichen, und daher der Berurteilung der Politik dienlich sein.

RESUME

1. Contexte

Le tourisme est l'un des secteurs économiques majeurs de l'Europe, contribuant à 5,5 % du produit national brut (PNB) de la Communauté aussi bien qu'avoir des effets économiques secondaires significatifs. Le tourisme affecte la société se traduisent de diverses manières et qui se rapporte à des questions telles que l'emploi, le développement régional, l'environnement, la protection du consommateur, la santé, la sécurité, le transport, les taxes et la culture.

Le programme législatif et de travail de la Commission européenne de 2003 prévoit une Communication de la Commission sur 'les orientations de base pour la durabilité du tourisme européen'. L'objectif général de la Communication est de montrer quelles approches et actions sont requises pour promouvoir la durabilité du tourisme en Europe, comment la Communauté européenne peut contribuer à la durabilité du tourisme européen et de fournir aux parties prenantes des orientations de base pour la mise en œuvre d'un tourisme durable.

Afin de préparer cette Communication, la Commission a lancé un document de consultation pour rassembler les vues de toutes les parties prenantes intéressées. La Commission a aussi sélectionné cette future Communication pour faire partie des 42 propositions faisant l'objet d'une évaluation approfondie d'impact. Une étude a été commanditée auprès de Risk and Policy Analysts Limited (RPA) pour aider à évaluer de manière approfondie l'impact de la Communication de la Commission.

2. Confirmation des défis posés par le tourisme durable

Les prévisions indiquent que le nombre de personnes arrivant en Europe à partir d'une provenance internationale doublera d'ici l'an 2020. Un volume croissant de touristes peut apporter des profits économiques à l'industrie et aux destinations touristiques et peuvent être un signe de développement social et de ses avantages associés dont bénéficient les touristes mais il peut également avoir des effets négatifs pour toutes les parties prenantes.

La Commission met l'accent sur la nature potentiellement non durable des tendances actuelles des effets de saison et de celles du transport. Ces tendances auront un impact négatif pour toutes les parties prenantes en détruisant la base des ressources dont dépend le tourisme. De plus, le manque d'investissements en infrastructure qui est lié au besoin de réseaux de transport plus durables, est souligné comme étant un facteur limitatif de la croissance (ceci est considéré comme un défi majeur par certaines parties prenantes). Des provisions supplémentaires en termes d'infrastructure risquent d'être en conflit avec les objectifs liés à l'environnement.

L'analyse des données existantes sur les tendances du tourisme et des réponses obtenues lors de la consultation, ont ainsi confirmé les défis identifiés. Les parties prenantes estiment aussi qu'une plus grande considération devrait être apportée à la

question de la protection des ressources culturelles et naturelles dont dépend le tourisme.

3.   Révision de l'objectif principal

Le but de la Communication proposée est de **promouvoir l'évolution vers un tourisme durable en Europe et à l'échelon mondial.** Son objectif est de stimuler à cette fin les efforts des parties prenantes multiples, s'étendant à tous les niveaux territoriaux et administratifs et de décrire comment la Communauté et les autres parties prenantes peuvent y contribuer davantage.

Globalement, le document de consultation incorpore la majorité des objectifs définis dans de précédentes définitions de politique de l'UE se rapportant à ce sujet, ainsi que celles définies au niveau international. Cependant des objectifs spécifiques peuvent bénéficier d'une identification plus claire pour garantir qu'une attention adéquate est apportée à tous les aspects du tourisme durable. Ceci s'applique en particulier à certains objectifs environnementaux relatifs au transport, à l'énergie et à la gestion de terrains, vu l'intérêt que les parties prenantes y accordent.

4.   Examen des options de la politique

Le document de consultation identifie quatre options de politique pour atteindre l'objectif principal de tourisme durable :

- une politique communautaire complète et authentique dans le domaine du tourisme (option A)
- un scénario de non-action (option B)
- compter sur des contributions bien établies (option C)
  - en tirant parti des activités des autres parties prenantes
  - intégration de la durabilité du tourisme européen dans les mesures communautaires déjà en place et
- renforcement et utilisation au mieux de la structure existante pour la prise d'action (option D).

Les options de politique proposées sont toutes valides dans la mesure où elles sont toutes potentiellement faisables et toutes reçoivent un certain soutien de la part des parties prenantes. Toutes les options tirent parti de la situation existante plutôt que de présenter les mécanismes opérationnels concrets.

Les options B et C s'accordent davantage avec le principe de subsidiarité alors que le principe de proportionnalité domine dans les options A et D. Le niveau de ressources nécessaire pour mettre en œuvre les options A et D sera considérablement plus élevé, cependant il est plus probable que ces options satisfassent les objectifs de la proposition (tandis que pour les deux premières options la probabilité de renverser les tendances non durables du tourisme est plus faible).

5. Analyses des impacts de la politique

La nature des questions et des options présentées implique que la quantification des impacts n'est pas faisable et donc des techniques telles que des analyses du rapport coût-profit et des analyses du rapport coût-efficacité ne peuvent pas être utilisées. L'évaluation des impacts produits doit donc se baser sur une analyse à critères multiples (ACM).

Des critères ont été définis pour ces analyses et sont donnés dans le tableau 1. Chaque critère doit être mesurable c'est-à-dire qu'il doit être possible d'évaluer, du moins d'un point de vue qualitatif, les résultats escomptés pour une option donnée, par rapport à ce critère.

Tableau 1: Critères d'analyse		
Groupe	**Critère**	**Défis adressés**
Groupe I	Développer la prise de conscience des consommateurs	Activité et comportement de touristes
	Réussir l'intégration et la cohérence entre les politiques et les approches	Tous défis
	Développer des processus transparents pour les parties prenantes multiples	Tous défis
	Développer des systèmes de contrôle et de diffusion d'informations	Tous défis
Groupe II	Réduire les effets saisonniers	Concentration du tourisme
	Provisions suffisantes en termes d'infrastructure	Investissment économique dans les destinations
	Accroître l'accès au tourisme pour tous les citoyens	Activité et comportement de touristes
	Promouvoir une mobilité inter et intra destination durable	Transport
Groupe III	Disponibilité de personnels qualifiés et compétents pour le secteur touristique	Compétitivité d'approvisionnement
	Utilisation d'outils de gestion pour le contrôle de la qualité et de l'environnement	Compétitivité d'approvisionnement; Utilisation des ressources naturelles et de la protection de l'environnement
	Utilisation de nouvelles technologies d'informations et de communications	Compétitivité d'approvisionnement
Groupe IV	Garantir le bien être communautaire dans les lieux de destination	Environnement culturel; Investissment économique dans les destinations
	Respect et maintien de la diversité de l'héritage culturel	Environnement culturel
	Respect de la capacité de transport de l'environnement	Utilisation des ressources naturelles et de la protection de l'environnement

L'évaluation montre que les options A et D sont celles qui ont la meilleure probabilité pour réussir cette évolution vers le développement d'un tourisme durable en Europe et à l'échelon mondial. Cependant, des ressources substantielles seraient nécessaires pour mettre en œuvre l'option A et cette option ne bénéficie pas d'un large soutien. L'option D est la plus efficace pour répondre aux défis du développement durable tout en respectant les principes de subsidiarité et de proportionnalité.

6.   Contrôle et évaluation des impacts de la politique

Une gamme d'indicateurs pour le tourisme durable a été étudiée afin d'identifier des moyens de contrôler et d'évaluer les résultats et les impacts obtenus après la mise en œuvre de la proposition.

Une liste illustrant les indicateurs est fournie. Nous recommandons que la Commission travaille avec les parties prenantes par exemple le groupe de direction et de contrôle européen, à parties prenantes multiples, dédié au tourisme durable pourrait s'occuper de l'identification d'un ensemble approprié d'indicateurs. Ces indicateurs seraient constitués principalement de mesures pour lesquelles des informations existent déjà actuellement (par ex. fournies par Eurostat ou de sources nationales) ou bien ces informations peuvent être obtenues de manière rentable. Comme l'indique la documentation (ARPAER, 2003), la mise en place d'un ensemble commun d'indicateurs pour les lieux de destination permettrait de faire des tests ce qui fournirait une assistance pour l'évaluation des politiques.