

Cooperating for Sustainable Tourism  
Kooperieren für nachhaltigen Tourismus

Proceedings of the FORUM INTERNATIONAL  
at the Reisepavillon 2002

herausgegeben von / edited by  
Burghard Rauschelbach, Annette Schäfer, Birgit Steck

The FORUM INTERNATIONAL at the Reisepavillon (January 2002 in Hannover, Germany) had been a joint initiative of the *Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH* (German Development Cooperation) and the *World Tourism Organisation (WTO)*. Organised by the GTZ, it was supported by financial means of the German Federal Ministry for Economic Co-operation and Development (BMZ). The FORUM INTERNATIONAL included stands at the fair, exhibitions, lectures and discussions on sustainable tourism. It focused on world-wide tourism and the cooperation with enterprises and organisations from developing and transform countries. The »International Year of Ecotourism« declared by the United Nations, as well as the World Summit for Sustainable Development in Johannesburg (2002) trigger off the joint initiative.

Das FORUM INTERNATIONAL auf dem Reisepavillon (Januar 2002 in Hannover) war eine gemeinsame Initiative der *Deutschen Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH* und der *Welttourismus-Organisation (WTO)*. Es wurde von der GTZ organisiert und mit finanziellen Mitteln des Bundesministeriums für wirtschaftliche Zusammenarbeit und Entwicklung (BMZ) unterstützt. Das FORUM INTERNATIONAL umfasste Messestände, Ausstellungen, Vorträge und Diskussionen zum nachhaltigen Tourismus, wobei der weltweite Tourismus und die Kooperationen mit Unternehmen und Organisationen aus Entwicklungs- und Transformländern im Vordergrund standen. Das »Internationale Jahr des Öko-Tourismus« der Vereinten Nationen sowie der Weltgipfel für Nachhaltige Entwicklung in Johannesburg (2002) sind aktueller Auslöser für die gemeinsame Initiative.



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## Introduction

Discussions about tourism within development politics are supported by the fundamental awareness that – on the international level – tourism represents one of the biggest economic branches. It is thus already of great importance in the realisation of strategies of sustainable development and poverty alleviation. In addition, the impact of touristic activities on economic development, the environment, culture and social settings is well known. There is thus an obligation for development co-operation to consider the aspect of sustainable development of tourism in its partner countries. This means, on the one hand, to ensure that the additional economic value as well the maintenance of the natural resources is guaranteed, and, on the other hand, active participation of the involved people ensures that local culture and traditions are taken into account.

Nevertheless, despite concrete requirement for counselling and intervention in the field in developing and transforming countries, tourism is regarded as a task of rather minor importance in development politics. This does not implicate however, that tourism-related projects do not play an important role in development co-operation. To a large extent, these are regional development projects or resource management projects. They aim to exploit potential sources of income for the local population living in and around protected areas and introduce environmental management activities or infrastructural measures as a basis for economic development and improved life standard. Sustainable tourism is also gaining importance in the field of economic development and employment promotion. Education, institutional development, the establishment of appropriate political frameworks and the support of enterprises are of growing significance.

The “International Year of Eco-tourism” of the United Nations and the World Summit on Sustainable Development in Johannesburg, 10 years after the conference in Rio de Janeiro (Rio +10), offer a current opportunity for a joint initiative of the World Tourism Organisation (WTO) and GTZ. It not only aims at the promotion of sustainable tourism, but also assists in the needs of enterprises and organisations that fulfil the criteria of sustainable tourism.

For several years, one of the goals of the “Reisepavillon”, an annual travel fair and conference event in Hanover, has been to provide a platform for sustainable tourism. It has established itself as an acknowledged “marketplace for alternative travel”. It was therefore a good opportunity to link the WTO/GTZ initiative with the “Reisepavillon” and to position the FORUM INTERNATIONAL there.

The FORUM INTERNATIONAL launched fair stands, exhibitions, presentations and discussions under the theme “World wide tourism as an engine of sustainable development”. Thirty suppliers from developing and transforming countries exhibited their wide range of products in the field of sustainable tourism and ecotourism within the framework of a mutual concept. The conference program, which purposely aimed at tourism enterprises and responsible tourism promoters, was laid out to discuss problems occurring in tourism, exchange experiences and the state of knowledge in marketing, resource management, community based tourism and questions of financing and certifications .

The following contributions were presented at the FORUM INTERNATIONAL. They show the political importance of tourism, give insight into the present discussion and how enterprises deal with the task of “promoting sustainable tourism”. It also becomes clear that the tourism economy is developing an increasing interest in development co-operation. Collaboration may be interesting for single activities as well as for projects in development co-operation.

This publication looks at different aspects of tourism development: some of the contributions come from exhibitors or enterprises. They have been reproduced in their mother tongue or a foreign language respectively. The editors, above all, wanted to provide a forum for the contributing enterprises. The individual writing styles here, in the various languages used (English, German or Spanish) thus leads to authentic contributions, which reflects the wide range of the participants of the FORUM INTERNATIONAL.

If you wish to contact the authors, please refer to the addresses listed at the end of each article. You will find the exhibitors list with short descriptions, as well as the conference program, in the annex.

**Burghard Rauschelbach and Birgit Steck**

# Einleitung

Die entwicklungspolitische Diskussion über den Tourismus wird von der grundlegenden Erkenntnis getragen, dass der Tourismussektor auf internationaler Ebene einen der größten Wirtschaftszweige darstellt und schon deshalb bei der Umsetzung von Strategien der nachhaltigen Entwicklung und der Armutsminderung von großer Bedeutung ist. Außerdem weiß man um die Auswirkungen, welche touristische Aktivitäten auf wirtschaftliche Entwicklung, Umwelt, kulturelle Gegebenheiten und Sozialgefüge haben können. Daraus ergibt sich die Verpflichtung für die Entwicklungszusammenarbeit, darauf hinzuwirken, dass touristische Entwicklung in den Partnerländern nachhaltig verläuft. Dies bedeutet, dass zum Einen die wirtschaftliche Wertschöpfung für die Menschen ebenso gewährleistet ist, wie der Erhalt der natürlichen Ressourcen. Zum Anderen garantiert aktive Partizipation der Betroffenen, dass an die lokale Kultur und Traditionen angeknüpft werden kann.

Gleichwohl und trotz des konkreten tourismusbezogenen Beratungs- und Interventionsbedarfs in Entwicklungs- und Transformländern wird Tourismus eher als eine nachrangige Sektoraufgabe der Entwicklungspolitik betrachtet. Dies heißt jedoch nicht, dass Tourismus in Projekten der Entwicklungszusammenarbeit keine Rolle spielt. Vielfach handelt es sich dabei um Projekte der Regionalentwicklung und des Ressourcenmanagements, deren Anliegen es z.B. ist, der Bevölkerung im Umfeld von Schutzgebieten neue Einkommensmöglichkeiten zu erschließen, Umweltmanagementverfahren oder Infrastrukturmaßnahmen – als Grundlage für die wirtschaftliche Entwicklung oder zur Verbesserung des Lebensstandards – einzuleiten. Auch im Bereich der Wirtschafts- und Beschäftigungsförderung nimmt die nachhaltige Tourismusentwicklung einen wachsenden Stellenwert ein. Hier sind insbesondere Aus- und Fortbildungsmaßnahmen, institutionelle Entwicklung, Schaffung angepasster politisch-administrativer Rahmenbedingungen und Unternehmensförderung von Bedeutung.

Das „Internationale Jahr des Öko-Tourismus“ der Vereinten Nationen und der Weltgipfel für nachhaltige Entwicklung in Johannesburg, zehn Jahre nach der Konferenz in Rio de Janeiro („Rio +10“), bieten den aktuellen Anlass für eine gemeinsame Initiative der Welttourismusorganisation (WTO) und der GTZ. Sie zielt nicht nur auf die allgemeine Promotion für den nachhaltigen Tourismus sondern kümmert sich konkret um die Belange von Unternehmen und Organisationen, die Kriterien für die Entwicklung eines nachhaltigen Tourismus erfüllen.

Der Reisepavillon als jährliche Reisemesse und Konferenzveranstaltung in Hannover verfolgt seit Jahren das Ziel nachhaltigem Tourismus eine Plattform zu geben und hat sich als anerkannter „Marktplatz für anderes Reisen“ etabliert. Es bot sich deshalb an, die WTO/GTZ-Initiative mit dem Reisepavillon im Januar 2002 zu koppeln und das FORUM INTERNATIONAL dort zu platzieren.

Unter dem Thema „Weltweiter Tourismus als Motor für nachhaltige Entwicklung“ umfasste das FORUM INTERNATIONAL Messestände, Ausstellungen, Vorträge und Diskussionsveranstaltungen. Im Rahmen des gemeinsamen Konzeptes stellten 30 Anbieter aus Entwicklungs- und Transformländern ihre vielfältigen Produkte zum Bereich „nachhaltiger Tourismus und Öko-Tourismus“ aus. Im Konferenzprogramm, das sich bewusst an die Tourismusunternehmen und verantwortliche Tourismus-Promotoren wandte, wurden Problemstellungen des

Tourismus erörtert, Erfahrungen ausgetauscht und der Stand des Wissens zu Marketing, Ressourcenmanagement, Gemeindetourismus, Finanzierungs- und Zertifizierungsfragen diskutiert.

Die nachfolgenden Beiträge wurden auf dem FORUM INTERNATIONAL vorgestellt und zeigen, welchen politischen Stellenwert der Tourismus hat, welche aktuelle Diskussion geführt wird und wie die Unternehmen mit der Aufgabe „Promotion für nachhaltigen Tourismus“ umgehen. Dabei wird auch deutlich, dass die Tourismuswirtschaft vermehrt an der Entwicklungszusammenarbeit interessiert ist, und die Kooperation sowohl für einzelne Fördermaßnahmen als auch mit Projekten der Entwicklungszusammenarbeit von Interesse sind.

Diese Veröffentlichung beinhaltet verschiedene Aspekte der konkreten Tourismusentwicklung: Einige der hier vorgestellten Artikel sind schriftliche Beiträge von Ausstellern und Unternehmen. Sie sind in der jeweiligen Mutter- bzw. einer fremden Arbeitssprache wiedergegeben. Den Herausgebern war es wichtig, ein Forum vor allem für die beteiligten Unternehmen zu bieten und somit führt der eigene Schreibstil in den hier verwendeten Sprachen (Englisch, Deutsch oder Spanisch) zu authentischen Beiträgen, die das bunte Bild der Teilnehmer des FORUM INTERNATIONAL widerspiegeln mögen.

Für direkte Kontaktaufnahme mit den Referenten stehen die Adressen unter den jeweiligen Artikeln. Das Ausstellerverzeichnis mit Kurzbeschreibung sowie das Programm des Konferenzteils finden sich im Anhang.

**Burghard Rauschelbach und Birgit Steck**



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# Worldwide Tourism as an Engine of Sustainable Development

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## Overcoming poverty in developing countries through self-sustainable international tourism

David Diaz Benavides, UNCTAD<sup>1</sup>

### Introduction

The tourism sector constitutes one of the most important sources of wealth of nations regardless of their level of development. For many developing countries, in particular the least developed countries (LDCs), small economies and islands states; tourism is probably the only economic sector, which provides concrete and quantified growing trading opportunities, and therefore, it is for them one of the fundamental pillars of their economic development. Since, tourism plays an important role in the improvement standards of living and rising people above the poverty threshold, it has become a platform to transform the vicious circles of misery, into virtuous circles towards productive transformation, welfare and improvement of human capital. Tourism not only provides material benefits it also brings cultural pride, a sense of ownership and control and through diversification, reduced vulnerability<sup>2</sup>. Tourism should be assessed objectively against other opportunities, to overcome poverty in tourism destinations of developing countries.

Though, to maximize the benefits of tourism, the existing uneven distribution of benefits among nations that is threatening the economic, social, and environmental sustainability of tourism in many developing countries, have to be overcome. Yet, the 49 LDCs accounts today for only less than 1 percent of international tourist arrivals and an approximately 0.5 percent of international tourism receipts. This acute imbalance is being accentuated by the dependence of tourist destinations on external travel distribution networks, and the anticompetitive behaviour of some tourism operators at worldwide scale. To a great extent, such a situation is responsible for the loss of potential remuneration of developing countries and in particular in LDCs.

Against this background, part I presents an overview of most important facts, trends and features, and the most impacting factors affecting performance, efficiency and sustainability of tourism transactions in developing countries. Part II presents an overview and illustration of main issues affecting the viability of tourism in developing countries. Part III presents some reflections about the "GATS 2000 Negotiations" as a possible turning point for making effective the increasing participation of developing countries in international tourism flows in a sustainable perspective.

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<sup>1</sup> The opinions expressed herein are personal opinions, and therefore do not express the official position of UNCTAD (United Nations Conference on Trade and Development).

<sup>2</sup> World Tourism Organization, The Least Developed Countries and International Tourism, Background Note presented at the High Level Meeting on Tourism in LDC, Canary Island, March 2001.

## I. Tourism's potential contribution to development: salient facts and features

### a) Tourism income

Tourism is at the present time the largest income generator of the world economy. During 1999 total tourism receipts, including those generated by air international fares, were the most important export revenue worldwide.

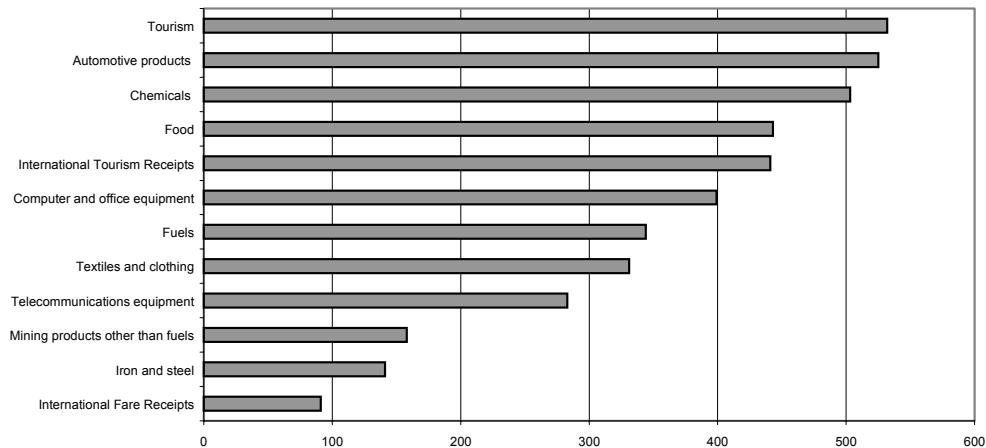
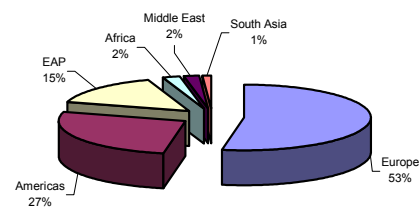


Figure 1: Worldwide export earnings, 1998. *Sources:* World Tourism Organization and IMF.

Export revenue that year amounted to an estimated US\$ 532 billion, surpassing all the other international trade categories (see figure 1). International tourism totalled to US\$ 441 billion and the international transport of passengers US\$ 91 billion, which corresponded to 7.9 and 1.3 per cent respectively of worldwide exports of good and services. Figure 2 shows the striking uneven distribution of tourism revenues by developing region. Africa, Middle East and South Asia receive a little bit more than 5 percent of world receipts.



*Source:* OMT/WTO database.

Figure 2: Tourism receipts market share (%), 1998.

Other relevant facts and figures showing the growing importance of the economic contribution of tourism for developing countries are presented below<sup>3</sup>

- In 1999, 23.9 percent of world tourism revenues (US\$ 131 billion) were accrued to developing countries.
- Tourism is one of the top five sources of foreign currency, for 83 percent of developing countries, including for 31 over 49 Least Developed Countries (LDCs). The contribution of tourism receipts to total revenues in these countries is within the range of 80 to 20 percent. During the period 1995-1998, tourism revenues were one of the five leading sources of export revenue for 69 developing countries. Among the latter, tourism revenue was the main source of foreign currency in 28 countries, its share in total exports ranging between 79 and 20 per cent; in 27 countries it accounted for between 20 and 10 per cent; and in the 24 remaining countries it was around 10 per cent.
- For at least one third of developing countries including 24 LDCs, tourism receipts is the main source of export revenue.
- The growth of international tourism receipts in the LDCs during the 1990s, total receipts more than doubled between 1992 and 1998 (from US\$ 1 billion to US\$ 2.2 billion).
- Although only 0.5 per cent of the world's exports of services originate in the LDCs, international services are an important part of the economies of those countries. In 1998, services accounted for 20 per cent of the LDCs' total exports of goods and services. However, in 13 of the 49 LDCs services export receipts exceeded merchandise export receipts and in all but three of those the share of tourism services exports in total foreign exchange earnings was more than twice the share of merchandise exports.
- The growth of international tourism receipts in the LDCs was also quite rapid during the 1990s: total receipts more than doubled between 1992 and 1998 (from US\$ 1 billion to US\$ 2.2 billion). There is a great degree of concentration in the distribution of tourism receipts among the LDCs: five countries (Cambodia, Maldives, Nepal, Uganda, United Republic of Tanzania) accounted for 51 per cent of the total tourism receipts of the group in 1998. Particularly strong, over the decade, was the growth in international tourists' expenditure in Cambodia, the United Republic of Tanzania, Myanmar, Bangladesh, Samoa, Uganda and Haiti.
- During the 1995-2000 period the share of tourism income to GDP in all most of developing countries oscillated between 83 and 0.12 percent, depending of the degree of diversification of their economies. For instance 82.29 per cent (in Maldives) and 30 per cent (in Samoa), 1.83 percent in Mexico. One aspect to be underlined is that although the contribution of tourism revenues is important in all developing countries, its contribution to GDP is declining as the economies become more diversified. The best examples of this are Mauritius, the Dominican Republic and Tunisia.

#### **b) Tourist arrivals**

Preliminary figures for tourist arrivals for 1999 show that these arrivals totalled 664 million. The distribution and share by geographical region are presented in figure 3.

Tourist arrival to developing countries account for about one third of world international arrivals, however there is an uneven distribution among regions and countries within a region. One salient feature of arrival is the growing importance of intra-regional movement of travellers. Main trends and features are presented below.

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<sup>3</sup> The Tourism Economic Report 1998 World Tourism Organization, [www.world-tourism.org](http://www.world-tourism.org)

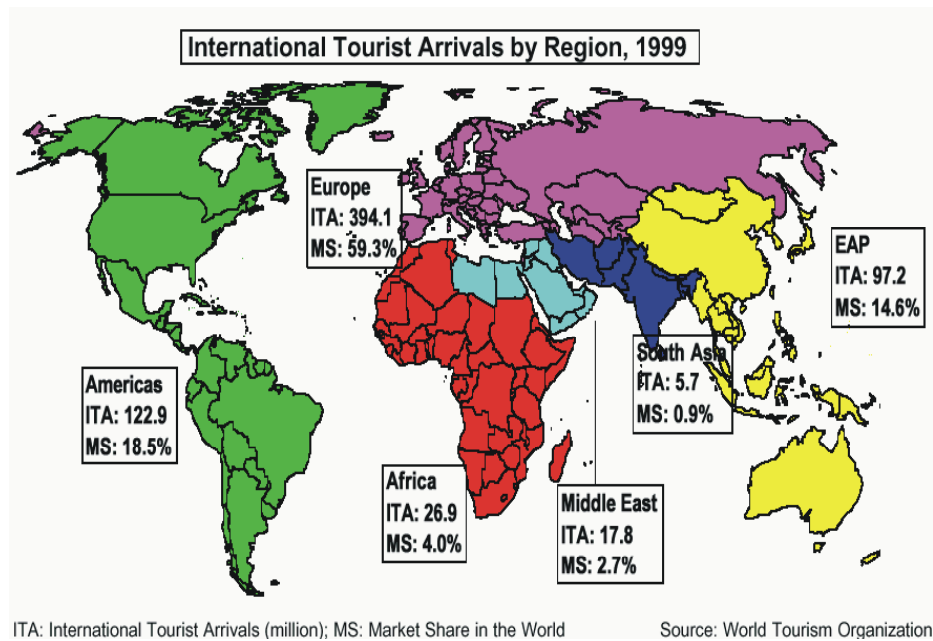


Figure 3.

**Africa.** The African region showed a growth rate of 7.8 per cent in the number of arrivals, nearly twice the world average. There is a high concentration of international tourism arrivals in this region, bound for destinations in the north and south of the continent. The best-performing countries in terms of the increase in the number of arrivals included Morocco (18 per cent), Zimbabwe (11 per cent) and Zambia (26 per cent), while the important tourism destinations of Tunisia (3.4 per cent) and South Africa (6 per cent) continued to show steady gains.

**Americas.** The rate of growth for the whole region 2.4 per cent was lower than the world average, mainly owing to flat results for South American countries (-1 per cent) and Mexico (-2.9 per cent). Central America fared much better, especially Guatemala (29 per cent) and El Salvador (21 per cent). Results in the Caribbean were mixed, with Cuba (12 per cent) and the Dominican Republic (15 per cent) among the big winners and Puerto Rico (-11 per cent) among the losers.

**East Asia/Pacific.** After two years of decreasing tourist arrivals, East Asia and the Pacific bounced back strongly in 1999, attracting nearly 10 million more tourists than the previous record, set in 1998. Growth was widespread, with especially good results in Malaysia (43 per cent), Cambodia (29 per cent), Viet Nam (17 per cent), Singapore (11 per cent), Thailand (10 per cent), Republic of Korea (10 per cent), China (8 per cent) and Hong Kong, China (18 per cent).

**Europe.** Overall, tourism to Europe grew by 2.7 per cent in 1999, with results mixed according to region. In this region some economies in transition were affected by the Kosovo crisis and instability in the Russian market, which caused problems for mature destinations in Central and Eastern Europe such as Hungary (-14 per cent), Poland (-4.4 per cent) and the Czech Republic (-1.8 per cent). However, emerging destinations managed to attract the interest of travellers, for example, Estonia (15 per cent), Kyrgyzstan (17 per cent) and Georgia (21 per cent), as well as Russian Federation (17 per cent) and Ukraine (21 per cent).

**Middle East.** The Middle East is one of the world's smallest regions, receiving nearly 18 million tourists in 1999, but it also had the fastest growth rate with arrivals up by 16 per cent. Egypt, which represents a quarter of the regional total, recorded a spectacular growth rate of almost 40 per cent and a record number of tourist arrivals that far exceeds the totals achieved in its best year, 1997. Dubai, Lebanon and the Syrian Arab Republic also fared well, with arrivals increasing by 14, 12 and 9 per cent respectively. The Libyan Arab Jamahiriya registered an increase of 25 per cent.

**South Asia.** Tourism increased in most countries in this region, resulting in An increase of 8.3 per cent over the previous year's results. India registered an increase of 5.2 per cent, while arrivals in the Islamic Republic of Iran rose by 16.5 per cent, in Sri Lanka by 14.4 per cent and in Maldives by 8.6 per cent.

### c) Level of performance and sustainability of tourism in developing countries

The proper functioning of the tourism economy is linked to that of many other related economic activities, which accounts for the importance of its economic, social and environmental sustainability. As a matter of fact, the extent to which the business operations of international tourism, backward and forward are linked with other sectors will determine the level of performance and profitability of tourism, the extent of multiplier and spill over effects, and the retention of value added, i.e. the leakage effect.<sup>4</sup> The sectors producing goods and services are linked backwards with tourism in catering for the needs of tourists and tourism operators, e.g. agriculture and food-processing industries, and other manufacturing industries providing furniture, construction materials and other articles required by tourism establishments. Similarly, many other services, such as transport, business services, financial services, professional services, construction design and engineering, environmental services, security services and government services, also ensure the efficient performance of tourism operators. Some of these sectors are also crucial for the proper linkage of tourism with foreign markets (forward linkages) because they constitute the platforms for "taking off" and for keeping the national tourism providers fully integrated with international tourism flows.

Many developing countries have found important to improve the linking of tourism (forward and backward) with the other sectors of the economy as one of the foundations of tourism development policies, so as to capitalize on the benefits of the globalisation and internationalisation of markets. Successful experiences<sup>5</sup> of small economies and islands that have recently become emerging tourism destinations, such as Mauritius, Maldives, the Dominican Republic and other Caribbean islands, attest to the vital importance of the proper linkage of tourism with the rest of the economy, in their capacity of retaining value added, e.g., reducing leakages. Despite developing countries efforts to develop the most suitable domestic policy environment, the economic sustainability of tourism is being undermined by external factors beyond their control, notably the predatory behaviour of integrated suppliers which enjoy a dominant position in the originating markets of tourism flows.

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<sup>4</sup> David Diaz Benavides, "Strategic commercial policies: an option to support an increasing participation of developing countries in world tourism markets". In: WTO, "GATS implications for tourism". Seminar and Conference Proceedings, Milan, 1994.

<sup>5</sup> Prats F. "Tourism, environment and sustainable development in islands: 15 ideas and 9 cases for debate". Presentation at the International Conference on Sustainable Tourism in Small Island Developing States and Other Islands, organized by the World Tourism Organization/World Trade Organization October 1998.

## **II. Key issues with special impact on the social, economic and environmental sustainability of tourism**

This part presents an overview and illustration of the main issues affecting the viability of tourism in developing countries, including (a) the leakage effect produced by their structural vulnerabilities and their difficulties in taking advantage of commercial opportunities; and (b) anti-competitive practices affecting tourism viability and performance in different segments of the tourism sector, as well as those in other sectors closely linked to travel and tourism.

### **1. Leakages from tourism in developing countries<sup>6</sup>**

As a modality of international commerce, tourism involves not only inflows of foreign financial resources but also outflows, referred to herein as "leakages". When they exceed specific levels, these outflows can significantly neutralize the positive financial effect of international tourism. Leakage is the process whereby part of the foreign exchange earnings generated by tourism, rather than being retained by tourist-receiving countries, is either retained by tourist-generating countries or repatriated to them in the form of profits, income and royalty remittances, repayment of foreign loans, and imports of equipment, materials, capital and consumer goods to cater for the needs of international tourist and overseas promotional expenditures.

Leakages can be divided into three categories: internal leakage or the "import-coefficient" of tourism activities; external leakage or pre-leakage, depending on the commercialisation mode of the tourism package and the choice of airline; and invisible leakage or foreign exchange costs associated with resource damage or deterioration.

Internal leakages can be measured by establishing "satellite accounts" within national accounting and survey procedures to detail all tourism-related economic activities. It is a normal effect present in both developed and developing countries. In principle, import-related leakages are highest where the local economies are weakest owing to sparse factor endowment or inadequate quality of goods and services. The average leakage for most developing countries today is between 40 and 50 percent of gross tourism earnings for small economies and between 10 and 20 percent for most advanced and diversified developing countries.<sup>7</sup> Importantly for LDCs, tourism import-related leakages are often inferior to other economic activity leakages, including manufacturing and, in some cases, agriculture, thus confirming tourism as a choice sector of development for which they possess comparative advantages in many areas.

A first step in reducing internal leakage is to identify what levels are appropriate given the economic structure of a country and then to ensure that effective leakage remains near this objective range while strategies to build up the local supply capacity are put in place. Although restrictive trade policies can reduce the size of the market, it is important to note that import openness tends to facilitate the leakage effect unless the economy has already in place a structure capable of reacting to the competitive stimulus of imports, which is usually not the case in LDCs.

External leakage or pre-leakage is much more difficult to measure and relates to the proportion of the total value added of tourism of services actually captured by the servicing country. To the extent that developing countries have limited access to commercialisation channels in their target markets, they can only offer base prices to intermediaries that capture the mark-up on those services.

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<sup>6</sup> This section is based on the contribution by Ellen Perez Ducy de Cuello, contained in *Financial Leakages from the Tourism in Developing Countries*, to be presented at the High-Level Meeting on Tourism in LDCs, Las Palmas, 26-29 March 2001.

<sup>7</sup> OMT/WTO, *Políticas de Aviación y Turismo*, Madrid, 1995, p. 55.

Observed differences between paid and received prices for developing country tourism services (lodging, food, entertainment, etc.) suggest external leakage or pre-leakage levels of up to 75 percent. In some cases, base prices do not allow for the economic sustainability of projects, and normally do not contemplate replacement costs associated with resource depletion. This leads to problems of infrastructure and environmental sustainability, which tend to be overlooked in view of the short-term importance of crucial foreign exchange inflows.

As a flow variable, leakage levels do not have a static effect. They vary in time depending on:

- The stage or cycle point of the tourism industry. For example, a nascent tourism industry tends to require large amounts of one-time imports, whereas loan grace periods may allow for a decrease in leakage during the first few years of operation. During a maturity phase leakage may increase as large sums are invested in marketing, rehabilitation of facilities and upgrading of products provided, etc.
- The evolution of the economy to provide new services and products resulting from demand from the tourism sector. The import of products and services initially not available should trigger enough entrepreneurial response to enable these to be provided locally, thus allowing for a lessening of leakage. It is therefore a main objective of leakage limitation to provide and promote these links between domestic industry and tourism. For example, in the Dominican Republic leakages diminished between 1990 and 1995 as local industry became increasingly interested in servicing the tourism market.<sup>8</sup> The largest companies have now created subsidiaries specifically for this purpose.

Another factor to be evaluated in identifying appropriate leakage levels is the type of tourism being promoted. High-income tourism, because it requires the provision of very high quality and high priced goods, may actually result in increased leakage in some cases despite of the higher income it may generate. Mass tourism could have higher potential for leakage than ecological or adventure tourism because the latter value and consume local resources as part of the tourism experience. However, low-leakage tourism can also equate to low-income tourism, resulting in lower total income and therefore limiting the possibilities for expansion and development by other sectors of the receiving country's economy. In order to correctly evaluate the return on investments it is necessary to carry out a cost-of-opportunity study that will establish a "leakage break-even point" as a function of the country's economic capacity to serve different types of tourism and choose the type most suitable for a project or country.

Leakage effects on tourism net income levels are nonetheless offset by increased value added or volume. As an example of the positive outlook for LDCs, value added in tourism, measured as tourism income per tourist arrival ( $Y_t/A_t$ ) has grown by over 100 percent in 21 (almost half) of the LDCs surveyed between 1998 and 1992 (see table 2).

Interestingly, growth in income per tourist appears to bear no clear relationship to the level of or growth in arrivals (see figure 4). This suggests that growth in income per tourist is not a function of volume, and has therefore grown basically because of a favourable quality/price ratio. This also confirms the enormous diversity of situations present in LDCs and their tourism industries; but, in general, as value added grows, the *potential* for leakage lessens.

However, for varying reasons, including differing lengths of stay, very few countries have achieved income-per-tourist levels of above US\$ 1000. The growth (calculated as the simple growth rate for 1998/1992) of the middle-income tourism category of US\$ \$500–\$999 has been higher not only for arrivals (a factor of 2 versus 1.75) but also for combined income per tourist category (a factor of 4.9 versus 2), as can be seen in table 1. This indicates that the primary competitive segment for LDCs, as well as the segment where most opportunities for growth in value added exist, tends to be in this category of pricing.

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<sup>8</sup> Banco Central de la Republica Dominicana, *Cuenta Satelite de Turismo*, 1991, 1994-1996.

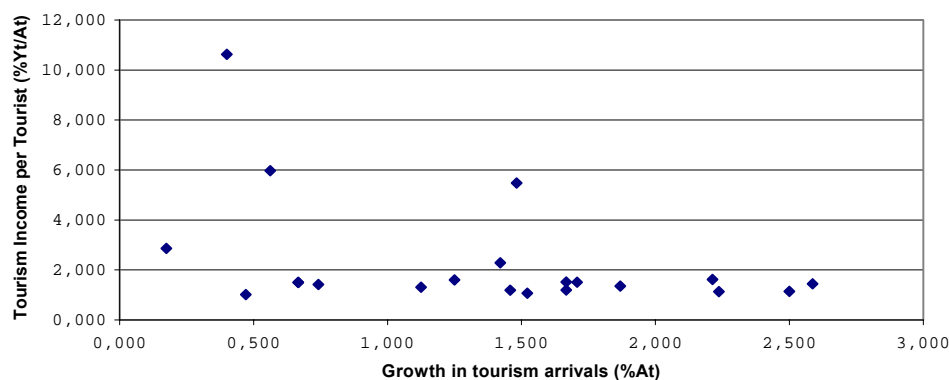


Figure 4: Insensitivity of LDCs tourism income per tourist to volume of arrivals, % growth, 1998/1992.

Tourism policy should therefore be based on the premise that although leakage is an intrinsic element of international tourism, and increased value added will also benefit the economy, leakage-containment measures have multiplicative effects that will allow developing countries to maximize the financial benefits to be derived from an expansion of tourism. A study on Indonesia showed that the tourism multiplier (1.59) was the highest of all categories, including final demand, and exhibited strong links to the agricultural sector, on which it had no direct effect at all.<sup>9</sup>

Table 1: Number of countries with high-and middle-income tourism, 1988-1998. Source: Calculations based on World Tourism Organization statistics.

	Number of countries with:		
Year	Income per tourist >USD 1000	Combined income, US\$ (millions)	Combined arrivals (000)
1988	4	62	58
1992	4	97	
1998	7	162	118
<i>growth % factor 98/92</i>	1.75	2.6	2.0
	Income per tourist > USD 500	Combined income, US\$ (millions)	Combined arrivals (000)
1988	8	152	382
1992	14	438	
1998	16	1478	1888
<i>growth% factor 98/92</i>	2	9.7	4.9

<sup>9</sup> ESCAP, *The Economic Impact of Tourism in Indonesia*, 1991.



Table 2: Trends in tourist arrivals and income per tourist for LDC's 1992/1998. Source; World Tourism Organization. a/ external estimates b/1997. \*cumulative growth rate (not annualised).

	Tourist Arrivals (000)	Tourist Arrivals (000)	Tourism Income (US\$m)	Tourism Income (US\$m)		Income per Tourist (000)	Income per Tourist (000)	Growth in tourist arrivals	Growth in income per tourist
	At	At	Yt	Yt		Yt/At	Yt/At		
	1992	1998	1992	1998		1992	1998	1998/1992*	1998/1992*
Burundi	86	15	4	2		0.05	0.13	-83%	187%
Comores	19	27	8	26		0.42	0.96	42%	129%
Tanzania	202	447	120	431		0.59	0.96	121%	62%
Kiribati	4	5	1	2		0.25	0.40	25%	60%
Haiti	90	150	38	96		0.42	0.64	67%	52%
Maldives	236	403	113	292		0.48	0.72	71%	51%
Afghanistan	6	4	1	1	a/	0.17	0.25	-33%	50%
Sao Tome	3	2	2	2	a/	0.67	1.00	-33%	50%
Lesotho	155	115	19	20		0.12	0.17	-26%	42%
Ouganda	92	238	38	135	b/	0.41	0.57	159%	37%
Samoa	38	71	17	43		0.45	0.61	87%	35%
Yemen	72	81	47	69		0.65	0.85	13%	30%
Bhutan	3	5	3	6		1.00	1.20	67%	20%
Ethiopic	83	121	23	40		0.28	0.33	46%	19%
Cambodia	88	220	50	143		0.57	0.65	150%	14%
Mali	38	85	11	28		0.29	0.33	124%	14%
Burkina Faso	92	140	24	39		0.26	0.28	52%	7%
Tchad	17	8	21	10		1.24	1.25	-53%	1%
Djibouti	28	19	6	4		0.21	0.21	-32%	-2%
Gambie	64	87	27	33		0.42	0.38	36%	-10%
Cape Verde	19	52	7	17		0.37	0.33	174%	-11%
Benin	130	152	32	33		0.25	0.22	17%	-12%
Salomón Islands	12	16	6	7		0.50	0.44	33%	-13%
Nepal	334	435	110	124		0.33	0.29	30%	-13%
Vanuatu	43	51	56	52		1.30	1.02	19%	-22%
Madagascar	54	133	39	74		0.72	0.56	146%	-23%
Niger	13	18	17	18		1.31	1.00	38%	-24%
Zambia	159	382	51	90		0.32	0.24	140%	-27%
Cent. African R.	7	20	3	6		0.43	0.30	186%	-30%
Malawi	150	215	8	8		0.05	0.04	43%	-30%
Sudan	17	34	5	6		0.29	0.18	100%	-40%
Rep. Dem. Laos	30	260	18	68		0.60	0.26	767%	-56%
Myanmar	27	194	16	35		0.59	0.18	619%	-70%
Rep. Dem. Congo	22	32	7	2		0.32	0.06	45%	-80%
Togo	49	96	39	15		0.80	0.16	96%	-80%
Guinea	33	99	11	6		0.33	0.06	200%	-82%

To the extent that leakages lead to a definition of economic opportunities it can be useful as a strategic blueprint for further economic development. Domestic policies in developing countries against leakages from international tourism should include (i) the provision of incentives to reinvest profits and potential cash transfers that otherwise would be invested abroad; (ii) the en-

hancement of the capacity of tourist destinations for intensifying the production of goods and services required by the tourism sector; (iii) the provision of incentives to domestic investors to expand their participation in tourism and iv) the enforcement of domestic competition policy against anti-competitive practices by tour operators.

As regards external leakages, most issues address points of discussion under the GATS Annex on tourism in the WTO, such as (i) local and international competition policy, particularly with regard to market access issues and best business practices in relation to regulations on contractual practices; and (ii) ecological and economic sustainability and the valuation and use of non-tradable resources.

A policy itself, to reduce leakages and thus to improve the chances for a more viable tourism sector, should be based on the premise that leakages can be managed and need to be reduced from its present levels, where combined visible internal and external leakage can easily reach 75 percent of the market value of paid services. Management of leakages, should allow countries to profit as best as they can from the market expansion and competitive factor that tourism demand represents for local industry and the local economic structure in all fairness to least developed and developing countries, without engaging in anti-competitive practices that contradict other WTO principles, and reduce the contribution of tourism to sound economic development.

## **2. Anti-competitive practices affecting tourism sustainability**

The competition issue and the treatment of anti-competitive behaviour are at the core of the problems of efficiency, viability and sustainability of tourism in developing countries. The latter's ability to deal with those two aspects and to counter their effects is a crucial matter. Firstly, this is because anti-competitive behaviour occurs largely in developed countries, as a result of the fierce competition among a few integrated dominant players with a high market share in their own market and in all segments of tourism industry supply, notably tour operators, travel agencies, hotels etc. Secondly, the pattern of globalisation, which is the driving force of many of the developments in the supply of the tourism and air transport, also mostly originates and is controlled in the two leading developed economies, namely the European Union and the United States. Consequently, what often appears to be a normal commercial relationship in a developing country may actually be the result of a network of anti-competitive practices arising from a globalised and highly integrated tourism trading environment, dominated by a few suppliers in the originating tourism markets. Moreover, other non-behaviour-related industry issues, such as the inadequacy or absence of a domestic competition legal framework in developing countries, and the lack of multilateral disciplines and mechanisms within the GATS framework,<sup>10</sup> also affect the ability of developing countries to deal with or prevent anti-competitive practices in their tourism sectors.

### **Why and how do anti-competitive practices threaten the viability of sustainable tourism in developing countries?**

The economic and social viability of tourism in developing countries depends on sustainable growth perspectives, in terms not only of absolute values, but also of their capacity for retaining more value added in their economies, i.e. smaller leakages, an even distribution of benefits in commercial operations, elimination of all barriers to tourism, particularly to commercial presence, and the movement of tourism suppliers in both origin and destination markets, and the effective implementation of provisions enumerated in Articles IV and XIX of GATS. The foundations for sustainable tourism are already in place in most developing countries as a result of the autonomous liberalization of the tourism sector itself and the progressive liberalization of many other

<sup>10</sup>Notably GATS Article IX Business practices.

services sectors. However, for those countries highly dependent on tourism revenue, the benefits of the liberalization of tourism are being threatened by the predatory practices of a few dominant tourism suppliers in the world tourism market. The evolution of the GATS disciplines, and the consistency of future commitments of developed countries with the economic, social and environmental sustainability of tourism in developing countries in the GATS 2000 negotiations, should mark a turning point favouring more profitable tourism for all WTO members, particularly the most vulnerable small developing countries.

The predatory practices and anti-competitive behaviour in international tourism have two main effects on the economic sustainability of the tourism of developing countries: unbalanced trade benefits, and the deepening of the leakage effect. Their combined impact minimize the positive impacts of spill over and multiplier effects inherent to tourism, and undermine the financial capacity of enterprises and the ability of countries to earmark necessary resources to maintain and upgrade basic infrastructure and quality standards in order to satisfy in an adequate way competitive conditions and international demand. Moreover, in most vulnerable and small developing economies, particularly LDCs, the foundations of tourism are threatened by unbalanced results in their business operations,<sup>11</sup> which are in turn threatening the social, economic and environmental sustainability of tourism.

There is much documented evidence<sup>12</sup> about the negative impact of anti-competitive behaviour of developed countries' dominant tourism suppliers on their own markets and overseas. Unfair practices, which confront developing countries' suppliers in their business operations with dominant suppliers in tourism-originating countries, are of a different nature and occur in different segments of tourism and related activities.<sup>13</sup> One of the salient features that become evident in commercial relations is the uneven distribution of benefits, due to the dominant position and market power of integrated suppliers in their own markets and worldwide. These suppliers have absolute advantages, because of their control of inbound and outbound operations in their countries and overseas, which allow them to keep consumers dependent on the offer of the products and services they supply, at the expenses of imposing onerous commercial conditions on suppliers in different tourism destinations. The huge supply capacity of dominant players in all segments of tourism, including transporters, CRS/GDS, tour operators, travel agencies and hotels, allows them to prepare holiday packages and retail them through their own business networks, as well as to impose prices and conditions on suppliers in tourism destinations.

### **How do the business operations of tour operators and travel agencies in the originating markets of tourism affect the sustainability of developing countries' tourism?**

Tourism suppliers from developing countries e.g. hotels, inbound operators and land transport companies participate in international tourism mainly through the transactions of tour operators and travel agencies from developed countries in the developed countries' originating markets. As wholesalers of tourism products and services they assemble the holiday package by negotiating with destinations and operators in third countries. They view the tour package as an attractive option with many advantages for them: (a) it ensures flows of tourists; (b) it reduces the interna-

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<sup>11</sup> UNCTAD, "Tourism development in LDCs". TD/B/III.LDC/Misc 64, 17 February 2001. Can be downloaded from the UNCTAD website, [www.unctad.org](http://www.unctad.org)

<sup>12</sup> P. Evans, *Recent developments in trade and competition issues in the service sector: A review of practices in travel and in travel and tourism*. UNCTAD/ITCD/CLP/Misc.13, December 1999. Can be downloaded from the UNCTAD website, [www.unctad.org](http://www.unctad.org)

<sup>13</sup> See "International trade in tourism services: issues and options for developing countries". UNCTAD TD/B/ Com.1/E.M.6 /2, and TD/B/COM.1/17, 7 July 1998.

tional marketing costs of the destination; and (c) it increase the volume flow of package travellers, which is likely to increase investment by foreign construction companies, major tour operators and airline companies that wish to make the tourism product more attractive to consumers. However, tourism suppliers from tourism destinations in developing countries have very often underlined their weak bargaining position in business transactions, particularly with dominant suppliers of the most important originating tourism market from developed countries.

**(a) International competition among tour operators and travel agencies**

Tour operators in originating countries manage business operations through (a) a subsidiary of a vertically integrated firm with a number of related travel interests; (b) an entirely independent firm that specializes in putting holiday packages together and selling them; (c) a subsidiary of an airline; and (d) an operator directly linked to a travel agent.<sup>14</sup> The tour operator of each major market is dominated by a small number of national firms with a relatively large market share, which compete fiercely with each other. For instance, four firms with a share of over 60 per cent dominate the United Kingdom market.<sup>15</sup> This results in the larger operators having a dominant position with a very little competition, because the layer of the next competitor is too small. Consequently, the travel agencies (the retailers of tourism packages) in destination markets are almost entirely dependent on their linkages with the dominant tour operators. Also, consumers become captive in their choices of tourist package offered by dominant suppliers. The effect of this supremacy of integrated tourism suppliers in their own markets is mirrored in their dominant position in commercial relations with tourism suppliers in destination developing countries.

The benefits and costs of package tours to service suppliers in developing countries depend to a large extent on the nature and terms of the contracts between them and the tour operators from the tourism-originating countries. Accordingly, the bargaining powers of suppliers from developing countries are a central issue affecting the tourism sustainability of developing countries. Some examples of how the common practices in contractual arrangements affect the sustainability of tourism in developing countries are presented below.

***Use of Monopsonistic power over local tourism suppliers in developing countries***

The contract between a tour operator from an originating country and the suppliers in the destination country involves a block reservation for a future period at a negotiated price and specifies the terms of risk sharing in the event that not all the packages are sold. The tour operator normally has the greater bargaining power during the contract negotiations; if it considers that the negotiating partner's offer is not attractive enough, it can choose another hotel in the same area or even another region of the same country. Tour operators thus often exercise a monopolistic power over local tourism suppliers, such as local hotels, since for the latter the servicing of the package tour is a vital means of securing their occupancy rates.

The asymmetry of bargaining power is clearly revealed in the content of the contract. Often contracts last for one year or more, and the risk inherent in a long-term contract for a tour operator (e.g. uncertainty of future demands for the package), is reduced by negotiating various conditions favourable to the tour operator. A contract frequently contains the following provisions: a substantial discount is provided on rooms after the departure of the clients; no deposit is required for the booking; payment may be made long after the departure of the customers; and the tour operator retains the right to return unfilled rooms ("release-back clause") shortly before the arrival date, without any need to pay compensation.

<sup>14</sup> Evans, op. cit.

<sup>15</sup> Thea Sinclair M. and Stabler M. *The Economics of Tourism*. London, Routledge, 1997.

***Anti-competitive practices resulting from vertical integration***

Vertical integration among tour operators and travel agencies, which is currently proceeding at a notable pace in Europe, threatens to reduce the actual number of tour operators in the market. As a result, a great deal of market power is being transferred to the intermediaries that direct consumers to specific destinations. The consequences of this should be a major concern to developing countries' tourism destinations. The increase in the degree of concentration in the travel market in favour of mega-operators puts developing countries' suppliers and the other competitors in local markets at a clear disadvantage. It also opens the door to unfair practices, which directly affect tourist destinations. An example of this is the travel agent's "racking policy", which refers to the decision about which brochures to put on display. This has a crucial impact on the tourism destinations of developing countries, because for them the travel agent's display rack is almost an essential facility, and denial of access to it can severely restrict consumer exposure.

The threat of "deracking" (i.e. removing brochures from the shelves) is used by integrated suppliers in attempt to negotiate larger commissions, by pressuring tour operators not to supply independent travel agencies on better terms or by pushing their own holidays through in-house incentive schemes. The lasting impact of this practice is more restrictive in originating countries where tour operators are the main distribution channels, such as in Europe, where more than 60 per cent of tour packages are sold by integrated suppliers. Conversely, in the United States the possibility of "deracking" is lower because about 70 per cent of travel agencies are independent, GDS/CRS are more important as distribution channels, and the Internet is becoming a primary source of information for consumers about tourism destinations.

**(b) International competition among hotels**

The international hotels sector is characterized by a considerable diversity in the modalities of services provision, and by a high concentration of a very small number of large hotel groups, including hotel consortia, integrated hotel chains and tourism lodging (second homes). Their scope and focus are very often limited, either by a focus on home markets, notably through the hospitality franchising systems, or by a concentration on business travel and destinations. One important aspect to be noted is that the intensive use of the accommodation infrastructure, particularly hotels receiving international tourists regardless of the hotel's size, requires the continuous allocation of financial resources to maintain and upgrade the quality of accommodation to meet the standards of international demand.

In most developing country destinations huge investments have been made in the hospitality and accommodation sector either through investment of domestic resources or attracting foreign investors by increase of different modalities, including management contracts and franchising brand names

As in all the other segments of tourism-related activities, the importance of competition issues stems from a mix of practices through the distribution mechanisms. Anti-competitive behaviour in those mechanisms is thus most likely to have a significant effect on the ability of destinations, and of their hotel sectors, to compete effectively and to gain a fair share of the rewards of attracting tourists and travellers.

The sustainability of this sector in developing countries' tourism destinations depends on the occupancy rates (affected by seasonality) and the level of profits, which are highly influenced by the results of commercial transactions between hoteliers and tour operators from tourism-originating countries. In this connection, it has to be underlined that the accommodation sector is the one most affected by the dominant power of mega-operators, whose stringent demands in terms of quality standards are not duly compensated for with fair commercial remuneration. Another, wider impact of this predatory behaviour in the tourism economy of receiving countries is the

deepening of the leakage effect and the undermining of positive inherent multipliers effects of tourism. Depending on the magnitude of these unfair compensations from dominant tour operators, some tourism destinations in developing countries might be subsidizing tourists from originating countries.

Table 3: Options for investment in hotels for developing countries: Costs and benefits.

Types of investment	Benefits	Costs
<p><i>Total ownership</i> 100 per cent ownership of equity by a foreign subsidiary for an unlimited time</p>	<ul style="list-style-type: none"> <li>▪ No financial risk to the host country</li> </ul>	<ul style="list-style-type: none"> <li>▪ Large outflow of income from tourism (leakage)</li> <li>▪ Difficult to reflect government policy on tourism development</li> </ul>
<p><i>Joint venture</i> Partial ownership of equity by foreign capital for an unlimited time</p>	<ul style="list-style-type: none"> <li>▪ Access to extra capital</li> <li>▪ Access to international marketing networks</li> <li>▪ Lower social/political cost of FDI</li> <li>▪ Reduced income leakage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Requirement for a certain base capital</li> <li>▪ Risk-sharing</li> <li>▪ Possibly unfavourable contracts due to limited bargaining power</li> </ul>
<p><i>Franchising</i> The right to do business in a prescribed manner under an existing brand name is sold to a local firm</p>	<ul style="list-style-type: none"> <li>▪ Transfer of managerial and marketing skills</li> <li>▪ Assured standard of quality</li> <li>▪ Brand image</li> </ul>	<ul style="list-style-type: none"> <li>▪ Management risk is with the host country's firms</li> </ul>
<p><i>Management contracts</i> The business is controlled and managed by a foreign firm, without ownership by the latter</p>	<ul style="list-style-type: none"> <li>▪ Possible transfer of knowledge, skills and technology (e.g. GDS) through a cooperation agreement</li> <li>▪ Joint national and international publicity campaign</li> </ul>	<ul style="list-style-type: none"> <li>▪ No control over finance, management and planning</li> <li>▪ Small-size hotels may not be considered attractive to a consortium</li> <li>▪ Initial lack of brand reputation</li> </ul>
<p><i>Hotel consortia</i> Independent hotels pool resources in order to compete with integrated and franchised chains</p>	<ul style="list-style-type: none"> <li>▪ Reduced international leakage</li> <li>▪ Independence in adoption of corporate strategies</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lack of international reputation</li> <li>▪ Higher marketing costs</li> </ul>
<p><i>Full national ownership</i> Domestic investment without foreign links</p>		

### (c) Computerized reservation systems (CRS)/global distribution systems (GDS)

The development of international tourism relies on the effective commercialisation of tourism products to consumers at tourism-originating countries. World information and distribution networks play a decisive role in the international tourism sector since they bring the buyers and producers of tourism products into contact. CRS, GDS and the Internet are the backbone of world information networks, which provide the infrastructures and networking facilities for airlines, tour operators, travel agencies and other tourism operators to process and obtain information, make reservations and market tourism products.

CRS have been developed by large air carriers since the 1970s to process flight reservations. They later evolved and expanded to offer further services related to air transport, such as the storage of information on a worldwide basis, the issuance of tickets, marketing (by displaying information on fares, discounts and conditions attached to them) or the sale of products and services. Moreover, they cover not only services provided by airlines, but also land services supplied to tourists, such as package tours, hotels and vehicle rentals. With this enlarged range of services, they became known as global distribution systems.<sup>16</sup> GDS have significantly improved the efficiency of travel agents' business operations and their use is growing rapidly.<sup>17</sup> They have become the main marketing and trading tool of international tourism, as well as a major source of income for the carriers which own them. Through strategic alliances and other forms of cooperation or mergers in the most important markets, these systems minimize their costs and reduce the need for a direct commercial presence. A single GDS terminal provides immediate access to all services companies which have opted to market their products through this network.

The companies (air carriers or independent commercial companies) that control CRS and GDS either partly or entirely sell access to the system to tourism operators worldwide. There are many obstacles to and measures governing GDS networks. These include (a) unfair rights of access, (b) restrictions on display, (c) costs of services influenced by monopolistic practices, (d) neutrality and regulations, and (e) the technology gap among users.

**Access problems.** Despite their major contribution to the development of tourism, GDS are frequently considered a barrier to market entry, mainly because they are controlled by the major carriers and because of the unfavourable access conditions for competitors. While some East Asian developing countries have participated in the establishment of a major GDS (Abacus, complemented by the strategic alliance with Worldspan), other developing countries have not been able to do likewise, leaving their carriers and other service suppliers without privileged access to any GDS. Additionally, countries not yet seen as attractive tourist destinations, or whose hospitality sector is underdeveloped (particularly in Africa and South Asia), tend to be poorly represented, if at all, on GDS. Therefore, access to information on their tourism products is limited, thus making it difficult for them to sell their tourism services. These difficulties have meant that many smaller carriers, especially some from developing countries, have been obliged to continue using the traditional SITA CRS, which leaves them at a competitive disadvantage compared with those what are represented in the major GDS. On the other hand, in many developing countries, particularly in Africa, GDS are present as a result of joint ventures with local partners (e.g. the national carrier) but operate within a de facto monopoly. This leads to excessive user fees and hinders their potential for developing tourism.

**Display.** The GDS allows a travel agent to view a wide range of information, which sometimes requires several pages on a terminal screen. In most cases, however, travel agencies only consult

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<sup>16</sup> The largest GDS (and their main original developers) are Galileo (United, British Airways, Alitalia, Swissair, KLM), Sabre (American), Worldspan (Delta, TWA, Northwest), Amadeus (Air France, Lufthansa, Iberia) and Abacus (ANA and Asian developing country carriers). More recently, the One World Alliance was created among BA, AA and Iberia.

<sup>17</sup> In 1995, 91 per cent of total ticket sales in the United States were made using GDS.

the information on the first page (screen); the order in which screens are displayed is thus a crucial determinant in the user's selection of products. The display may discriminate against smaller carriers which do not own a major CRS, since controllers' own flights may be better displayed on the screens than those of their competitors (this is known as "display bias"). There may also be discrimination in favour of their suppliers of land services.

**Cost.** The cost of having services presented GDS may be prohibitively high for SMEs, leaving them with no access to this marketing tool. Even though all service providers have to pay a fee for having their services displayed in the systems, the costs of participation for the owners of GDS are fully or partly covered by the profits generated by the systems. The cost of hardware and user fees may prevent small users from using GDS; this puts some service suppliers (particularly SMEs) from developing countries at a disadvantage compared with their larger national or international competitors.

**Neutrality and regulations.** In order to prevent CRS from being used as an anti-competitive tool (e.g. by charging excessive fees for reservations made for non-owner companies) and to ensure their neutrality (e.g. by prohibiting display bias), the United States, Canada and the European Union have issued regulations in recent years on GDS operations related to air services, while the International Civil Aviation Authority (ICAO) adopted a code of conduct for CRS in 1991. However, the regulations and code have not been sufficient to resolve completely the anti-competitive bias of the systems, and particularly to address the specific problems of carriers from developing countries. The ICAO code (the only multilateral one) is non-binding and therefore there are no mechanisms to ensure its enforceability. The relevant domestic regulations are binding, but only within the territories of the countries concerned. The European Union regulations apply to CRS from countries which have similar legislation to ensure neutrality. On the other hand, although CRS have been included among the "soft" air services rights included in GATS, the commitments do not deal with their anti-competitive potential.

**Technology gap.** Installing and maintaining a system poses a greater problem to travel agents in developing countries, owing to deficiencies in the infrastructure necessary for such an information network, and the shortage of professionals to manage, operate and maintain the system. This not only represents a technical hindrance to the use of modern technology, but also increases the associated costs, thereby putting travel agents in developing countries at a disadvantage compared with their counterparts in developed countries.

**Electronic commerce.** The expansion of the use of the Internet and other forms of electronic communication opens up significant opportunities for developing countries to develop their tourism and air transport sectors. Their service suppliers can reach consumers around the world directly, offering both package tours and individual air and land services. They thereby cut out the costs of intermediaries (e.g. agency fees) and transaction costs and avoid the need for a direct commercial presence and its associated costs. Nevertheless, electronic marketing and trading have their own costs in terms of human and physical capital requirements. In countries where these requirements are in relatively short supply, the cost of electronic marketing and trading can be reduced if individual suppliers pool their resources. This could be coordinated, for instance, by national tourist authorities.<sup>18</sup> Moreover, modern technologies are likely to be increasingly used as institutional promotion tools. If there is a minimal critical mass of information infrastructure in a given country, the new technologies can offer substantial cost savings.

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<sup>18</sup> Naturally, the increased use of electronic means to develop tourism involves solving pending issues that are implied by all forms of electronic trade, such as access to infrastructure, confidentiality, safety of data transmission, consumer protection and taxation.



#### **(d) Air transport**

Air access in international tourism depends on the availability and conditions of air transport connecting tourist-generating countries and destination countries (i.e. prices, frequencies, travel time, etc.). Air transport is a major factor underpinning international tourism in the vast majority of developing countries, but its importance for tourism varies considerably from one region to another. It is the means of transport used by the majority of tourists arriving in developing countries. Air transport developed as a result of the increase in demand for tourism-related travel, becoming in turn the driving force behind the development of the tourism industry. In 1998, passengers were responsible for about 75 per cent of air traffic volume and for of the total operating revenues of airlines. It is estimated that up to 40 per cent of air passenger travel is for business purposes (as opposed to leisure or personal travel) and that business travellers account for up to half of airlines' income. Like tourism, the world air transport industry has expanded at twice the rate of world output growth, and is expected to continue to do so in the next twenty years.<sup>19</sup>

The main recent developments affecting air transport and the industry structure are the increased international ownership of airlines and their growing concentration, worldwide moves to liberalize and deregulate the sector, the privatisation of airlines and the formation of strategic alliances among firms. The main benefits of the latter are the cost reductions and efficiency gains that can be achieved by rationalizing the joint use of resources (such as check-in facilities and ground personnel), creating synergies and providing "network value" (i.e. the wider coverage of points serviced by the carrier and its partners) without the need to physically expand operations.<sup>20</sup> The large global alliances aim at world coverage by pooling the networks of their members.<sup>21</sup> The main drawback in doing this is that the alliances can restrict competition and thus negate some of these benefits, particularly if they collectively achieve a dominant position on given routes.

### **III. How the GATS 2000 negotiations should mark a turning point to make effective the increasing participation of developing countries in international tourism flows in a sustainable perspective**

#### **1. How negotiations could support the sustainability of tourism operations**

The GATS 2000 negotiations mandated by the Final Act of the Uruguay Round provide developing countries with a unique opportunity to counterbalance the asymmetries imbedded in the outcome of the Uruguay Round services negotiations. In this perspective, it is the right time to take advantage of these negotiations to prepare and put forward negotiating proposals on how to make effective use of the provisions of Art IV and XIX, aimed at increasing participation of developing countries in trade in services and the expansion of their services exports including through the strengthening of their domestic services and its efficiency and competitiveness.

<sup>19</sup> Air Transport Action Group, *The Economic Benefits of Air Transport (1994 Data)*, Geneva, 1997.

<sup>20</sup> One of the main forms which airline alliances can take is code-sharing, a marketing arrangement between airlines allowing them to sell seats on each other's flights under their own designator code. In the case of connecting flights of two or more code-sharing carriers, the whole flight is displayed as a single carrier service on a CRS.

<sup>21</sup> The largest alliances existing in early 1998 (in terms of passenger-km) were those headed by: (1) American, British Airways, JAL, Qantas, Canadian; (2) United, Lufthansa, Singapore, Air Canada, Thai, Varig, SAS, SAA (Star Alliance); (3) Northwest, Continental, KLM, Alitalia; (4) Delta, Swissair, Sabena, Austrian, TAP (Quality Excellence) (*The Economist*, 10 and 31 January 1998).

The two-way process involves not only the refinement of offers, but also the preparation of requests from trading partners as one of the key ways to obtain substantive benefits as result of the GATS 2000 negotiations.

Moreover, an active participation of developing countries in the GATS rule-making process is a contribution to building of an improved multilateral framework which would take into consideration existing asymmetries and the need for a predictable markets access for exporters of services from developing countries.

The viability of tourism, i.e. its economic, social, cultural and environmental sustainability, is at the heart of domestic policies and development concerns of developing countries. Accordingly, in the course of the present negotiations on trade in services, there is a need for similar focus on strengthening future substantive commitments on tourism by GATS members as was the case in other sector such as telecommunications and financial services. In this perspective the proposal for the Annex on Trade in Tourism Services (WT/GC/W/372), may contribute to providing a pro-competitive framework as a complementary tool which would ensure:

- *An adequate coverage and consistency of commitments in all tourism activities as defined by the Satellite Tourism Account.* This aspect is of paramount importance in view of specific characteristics and diversity of transactions linked to trade in tourism services, notably the heavy reliance of tourism on air transport and travel distribution systems.
- *The prevention of predatory behaviour and anti-competitive practices by dominant integrated suppliers in the originating markets.* This refers to disciplines to prevent anti-competitive conduct including from air transport and travel distribution systems, and to safeguard trade in tourism services from competitive exclusions, abuse of dominant and misleading or discriminatory use of information.
- *The effective access and use of information on a non-discriminatory basis.* It should include provisions on access to ensuring non-discrimination, transparent, reasonable and objective criteria; compliance with Art. IV of GATS and the truthfulness of the information on tourism distributed by governments (travel warning) and through GDS; the unbundling of travel distribution systems as a measure to counter vertical integration and conflicts of interest in travel agencies and the interconnection of CRS, through the portability of reservation numbers. Submitting GDS operations to effective multilateral disciplines and dispute-settlement mechanisms would have a substantial effect on trade and anti-competitive practices.
- *The implementation of an adequate framework for sustainable development of tourism.* Provisions on cooperation for the sustainable development of tourism are needed in recognition of the role of tourism in economic development; its need for infrastructure and development assistance; equitable trading conditions for economic sustainability; the relevance of enforcing internationally-recognized environmental and quality standards; the need for cooperation at all levels; and the importance of providing information on technologies required for competitive provision, regulation and sustainable development of tourism and all related-activities.
- *To preserve the environmental sustainability of tourism and the cultural heritage.* Guiding principles for national policies and trade commitments to preserve the ecological systems, the biodiversity, cultural patrimony and traditions.

## **2. Issues for consideration by developing countries in negotiating specific commitments in tourism**

The liberalization under the GATS 2000 will be determined on one hand, by the level of removal of barriers in the revised horizontal commitments (which affect all sectors) and on the other, the lifting of conditions and limitations applied to each sector at sector-specific level and in the four

modes of supply. Accordingly the consistency between the two types of commitment is an important issue to be addressed by developing countries, seeking to obtain commercially meaningful commitments at specific sectoral level.

**a) Improvement of horizontal commitments**

In preparation of their positions in services negotiations, developing countries must assess to what extent the horizontal commitments of developed countries impede the liberalization of tourism and travel and related services. The major limitation in the horizontal commitments is in the lack of significant trading opportunities in mode 4, i.e. temporary movement of natural persons, since practically no commitments in this mode were made in specific services sectors. The temporary presence of natural persons in all services sectors is undermined by the recurrence at the horizontal level to the economic needs tests, nationality and/or residence requirement and cumbersome administrative and visa procedures to be met by foreign nationals as services providers. The existing horizontal commitments by developed countries mainly refer to limitations for the establishment of the commercial presence (mode 3) by foreign providers to carry out the commercial operations.

**b) Specific tourism sector commitments**

Majority of tourism originating countries are developed countries, which have undertaken commitment to liberalize fully or partially the supply of services in different tourism sub-sectors and modes of supply. Still, the impact of commitments in commercial presence in term of market value is nullified by restrictions to the commercial presence of foreign tour operators, travel agencies, restaurants and hotels, which are not listed there. Also, the movement of natural persons engaged in the tourism supply of different services is precluded by limited horizontal commitments and the lack of specific sectoral commitments. For instance in many Members States of the EU the commercial presence of foreign tour operators from the third countries is precluded or allowed only in association with already established national firms therein. Similarly, foreigners are precluded from undertaking of the business operations in the restaurant sub-sector even for those specializing in typical national food from other countries. In addition, the level of restrictions on commercial presence is aggravated by the possibility of recourse to the economic needs test, cumbersome and discriminatory licensing requirements that foreign suppliers of tourism services must meet.

**c) Temporary presence of natural persons as consumers and providers of services**

It should be underlined that although the existing commitments on market access on *consumption abroad have no limitations* in the case of majority of the GATS commitments, including in the top originating countries; in real terms the freedom of movement for consumption abroad is restricted by the level of binding in other modes of supply, in particular the commercial presence of foreign suppliers in the tourism originating markets. The movement of consumers in most of the top originating markets of tourism is captive, because the existing level of binding of commercial presence consolidates the absolute advantage of the dominant mega-tour operators and other national suppliers including the travel agencies, since the exclusive right of selling directly to travelers of holiday packages in their own markets has been consolidated in the existing commitments on commercial presence. Moreover, under such commercial conditions, the consumers' choices are limited by the offers of holiday package by dominant tour operators, but not only them, also by the opportunities for suppliers from destination countries to reach consumer in the originating markets directly. In addition, the consumers' choices in these markets are restricted by unfair practices in the management of information systems and the "racking policies" by travel agencies, which are usually integrated with mega-tour operators.

To improve horizontal commitments on mode 4, developed countries should remove the application of the economic needs test with respect to the movement of professionals supplying tourism services. Not all the professions and occupations are equally important to the movement of persons in the context of trade in tourism services.

For example, the possibility to have the waiver from the application economic needs test should be provided to individual tourism services suppliers involved in catering, maintenance services or in such areas where cultural affinities and close contacts with tourists may contribute to the quality of the services provided. To the extent that the remaining occupations would remain subject to the application of economic needs tests, efforts should be made to reduce the scope for arbitrary and discriminatory practices, provide greater transparency and introduce more neutral economic criteria. The issue of transparency in respect of the application of the GATS commitments is crucial as a tool in promoting trade in tourism services. In that respect, commitments in mode 4 are closely linked to the implementation of the relevant immigration regulations, policies and procedures in a clear and transparent manner. Publishing of the legislation and implementing regulations which significantly affect ability of the foreign nationals or permanent residents move across borders to supply services is a general obligation, since this is the way to limit the room for discretionary and procedural rules. The lack of transparency, clarity in the existence, implementation and application of policy guidelines affecting application for and consideration of temporary work permits, residency requirements of visas impede market access, effectively violating key GATS provision.

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# Tourism in International Co-operation: Between Markets and Misunderstandings

## Tourismus in der internationalen Zusammenarbeit: Zwischen Markt und Missverständnis

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### Introduction by Burghard Rauschelbach, GTZ

The broad scope of the title has been chosen deliberately. It implies that there must be co-operation and understanding between markets and misunderstandings. At an event which is particularly dedicated to the promotion of sustainable tourism, the title reminds us, that we need to come to an agreement about markets and that misunderstandings must be eliminated to achieve economic success.

This leads to a series of questions which have to be dealt with on an international level but need to be answered locally.

- Which role do international organisations play in this context, and the convention on biological diversity?
- How can development co-operation organisations contribute to the goal of realising measures of sustainable tourism in partner countries?
- How can tour operators contribute to the goals of sustainable tourism?

**Eugenio Yunis** of the World Tourism Organization (WTO) and **Oliver Hillel** of the United Nations Environment Programme (UNEP) are two members of UN organisations which are mainly involved in building concepts and setting frameworks for sustainable tourism, while **David Diaz** comes from the Conference on Trade and Development (UNCTAD; see contribution: “Overcoming poverty in developing countries through self-sustainable international tourism”). The point of view of these organisations are rather different with respect to their goals. While the WTO emphasises the significance of sustainable tourism and especially the International Year of Eco-tourism for marketing, UNEP links eco-tourism with other world-wide initiatives of sustainable development. In contrast, UNCTAD underlines an approach of international tourism which is more orientated towards the goals of poverty reduction. At the same time, UNCTAD wants the governments to deploy tourism as a means to combat poverty.

**Jens Brüggemann** of the German Federal Agency for Nature Conservation (BfN) presents the international documents and agreements which lay out the framework for sustainable tourism. The convention on biological diversity is of special importance here; more than 170 countries have made a commitment to put the convention into practice. Brüggemann reports on the state of the international guidelines which shall help to implement the principles of sustainable tourism world-wide.

The co-ordinators of development co-operation projects of GTZ and CIM describe concepts and measures which have been developed to apply measures of sustainable development in partner

countries. **Johannes Baumgart** (GTZ) from South Africa presents a concept designed to coordinate mutual efforts of different institutions and communities in order to attain their goal of “responsible tourism” with a maximum economic gain and a minimum of destructive competition. **Nicole Häusler** (CIM) shows which kind of tourism fits into the idea of sustainable tourism. She describes examples of the daily involvement of tourists in the life of indigenous people.

**Karola Tippmann** (GTZ) presents a mutual marketing strategy which promotes the regional co-operation of rather different countries in Central America. **Klaus A. Dietsch** of Studiosus Reisen presents the philosophy of a tour operator who already devoted himself to the principles of sustainable tourism a long time ago. Together with **Dietlind von Laßberg** (Studienkreis für Tourismus und Entwicklung) he presents the results of a recently concluded study which investigated possibilities of uniting the interests of a tour operator with those of development politics. Journeys to current or terminated development co-operation projects are regarded as an interesting approach for public-private partnerships in the tourism sector.

During the discussions to the presentations, the importance of development politics which develop and implement a framework for tourism on an international, multilateral level and also support distinct measures in bilateral co-operation was once more confirmed.

On the panel-discussion **Hans Peter Schipulle** from the BMZ (German Federal Ministry for Economic Cooperation and Development) agreed, that tourism must be seen as a factor of the development policy, however – in relation to other sectors – it would have no priority. **Wolf Michael Iwand** (TUI group, Hannover) and Frank Schulz (schulz aktiv reisen, Dresden) explained the views of their enterprises. The market situation and the competition limit the scope for long term oriented measures of sustainable tourism, but the public discussion on the enterprise’s sustainability performance might be regarded as an important market-factor. This is where the development politics could prepare the way for strategic alliances. **Klaus Betz** (journalist and moderator of the panel-discussion) criticized the Ministry’s defensive attitude towards sustainable tourism. This would mean, that the potential of effective cooperation with the tourism industry would remain undiscovered for strategies of poverty alleviation and sustainable development.

Participating developing and transforming countries emphasised the need for support in the area of sustainable tourism. There is a remarkable growing interest in co-operation of state-owned institutions, the private sector and non governmental organisations. Also remarkable is the influence of the strict market orientation on the discussion on approaches to sustainable tourism. Finally, a reminder was made that world-wide recreational tourism is only a small part. Other forms of tourism must also be regarded as objects of development politics.

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### Einleitung von Burghard Rauschelbach, GTZ

Der Titel ist bewusst weit gefasst. Er deutet an, dass es zwischen Markt und Missverständnis Zusammenarbeit und Verständnis geben muss. Auf einer Veranstaltung, die sich insbesondere der Promotion des nachhaltigen Tourismus widmet, erinnert der Titel daran, dass man sich über Märkte verständigen muss und dass man Missverständnisse ausräumen muss, wenn man unternehmerischen Erfolg haben will.

- Daran schließen sich eine Reihe von Fragen an, die auf internationaler Ebene zu behandeln sind und vor Ort beantwortet werden müssen.
- Welche Rolle spielen in dieser Konstellation internationale Organisationen und das internationale Übereinkommen über biologische Vielfalt?

- Wie können entwicklungspolitisch wirksame Durchführungsorganisationen in den Partnerländern dazu beitragen, dass Maßnahmen des nachhaltigen Tourismus verwirklicht werden?
- Wie können Reiseveranstalter Beiträge leisten, die entwicklungspolitischen Ansprüchen gerecht werden?

Mit **Eugenio Yunis** von der Welttourismusorganisation (WTO) und **Oliver Hillel** vom Umweltentwicklungsprogramm der Vereinten Nationen (UNEP) kommen neben **David Diaz Benavides** von der Konferenz für Handel und Entwicklung (UNCTAD) (s. Beitrag: „Overcoming poverty in developing countries through self-sustainable international tourism“) die Vertreter von Organisationen zu Wort, die im Bereich der Vereinten Nationen maßgeblich an Konzepten und politischen Rahmensetzungen für den Tourismus beteiligt sind. Dabei sind die Sichtweisen entsprechend den Aufgabenstellungen dieser Organisationen durchaus unterschiedlich. Während die WTO den nachhaltigen Tourismus und insbesondere das Jahr des Öko-Tourismus in ihrer Bedeutung für das Tourismus-Marketing sieht, stellt UNEP den Öko-Tourismus in den Zusammenhang mit anderen weltweiten Initiativen der nachhaltigen Entwicklung. Demgegenüber stellt UNCTAD die Programmatik eines internationalen Tourismus in den Vordergrund, der sich stärker an den Zielen der Armutsminderung orientieren muss; gleichzeitig fordert UNCTAD von der Staatengemeinschaft, den Tourismus als Instrument der Armutsbekämpfung einzusetzen.

**Jens Brüggemann** vom deutschen Bundesamt für Naturschutz (BfN) stellt die internationalen Dokumente und Vereinbarungen vor, die den Rahmen für nachhaltigen Tourismus geben. Von besonderer Bedeutung ist hier die Konvention über biologische Vielfalt, zu deren Umsetzung sich mehr als 170 Staaten verpflichtet haben. Brüggemann schildert den Stand der internationalen Richtlinien, mit denen die Grundsätze eines nachhaltigen Tourismus weltweit durchgesetzt werden sollen.

Wie sich die GTZ und CIM vor Ort für Maßnahmen des nachhaltigen Tourismus einsetzen und welche konzeptionellen Vorstellungen entwickelt und umgesetzt werden können, schildern die Koordinatoren von Projekten der Entwicklungszusammenarbeit. **Johannes Baumgart** (GTZ) aus Südafrika stellt ein Konzept vor, nach dem das Zusammengehen verschiedener Institutionen und Gemeinden koordiniert werden soll, um gemeinsame Zielsetzungen eines „verantwortungsvollen Tourismus“ durchzusetzen, aber auch um einen größtmöglichen Marktnutzen ohne selbstzerstörerische Konkurrenz zu erreichen. **Nicole Häusler** (CIM) zeigt auf, welche Tourismusformen den Ansprüchen eines nachhaltigen Tourismus gerecht werden und gibt Beispiele für die Beteiligung von Touristen am täglichen Leben der Einheimischen. **Karola Tippmann** (GTZ) zeigt anhand einer gemeinsamen Vermarktungsstrategie, wie der Tourismus die grenzüberschreitende Zusammenarbeit zwischen sehr unterschiedlichen Staaten in Zentralamerika fördert.

**Klaus A. Dietsch** von Studiosus Reisen schildert die Unternehmensphilosophie eines Reiseveranstalters, der sich schon seit langem Prinzipien eines nachhaltigen Tourismus verschrieben hat. Zusammen mit **Dietlind von Laßberg** (Studienkreis für Tourismus und Entwicklung) stellt er die Ergebnisse eines kürzlich abgeschlossenen Projektes vor, in welchem zu prüfen war, inwieweit die Interessen eines Reiseveranstalters mit denjenigen der Entwicklungspolitik zusammengebracht werden können. Reisen zu laufenden und abgeschlossenen Projekten der Entwicklungszusammenarbeit werden als hoffnungsvoller und konkreter Ansatz für öffentlich-private Partnerschaften (PPP=Public Private Partnership) im Tourismusbereich gesehen.

In den Diskussionen zu den Beiträgen bestätigte sich, wie wichtig eine Entwicklungspolitik ist, die sowohl auf internationaler, multilateraler Ebene Rahmenvereinbarungen zum Tourismus erarbeitet und durchsetzt, als auch in der bilateralen Zusammenarbeit bei konkreten Maßnahmen unterstützend tätig ist.

Auf der Podiumsdiskussion stimmte **Hans Peter Schipulle** vom BMZ (Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung) zu, dass Tourismus entwicklungspolitische Bezüge hat, jedoch gegenüber anderen Sektoren in der Förderung gegenwärtig als nachrangig

angesehen sei. **Wolf Michael Iwand** (Reiseveranstalter TUI, Hannover) und **Frank Schulz** (schulz aktiv reisen, Dresden) vertraten die Sichtweise eines großen Reiseveranstalters bzw. eines kleinen Unternehmens. Deutlich wurde dabei, dass der Spielraum aufgrund der Marktsituation und des Konkurrenzkampfes zwar beschränkt ist, dass aber die öffentliche Diskussion als ein Marktfaktor zu verstehen sei. Die Entwicklungspolitik könne hierbei und beim Aufbau von strategischen Allianzen für einen nachhaltigen Tourismus eine wegbereitende Rolle spielen. **Klaus Betz** (Journalist und Moderator der Podiumsdiskussion) kritisierte die defensive Haltung der herrschenden tourismusbezogenen Entwicklungspolitik. Das Potenzial für wirksame Kooperationen mit Reiseveranstaltern könne so für Zielsetzungen der Armutsminderung und der nachhaltigen Entwicklung nicht erschlossen werden.

Von Seiten der Entwicklungs- und Transformländer wurde der Bedarf an Unterstützung bei der Förderung eines nachhaltigen Tourismus deutlich. Bemerkenswert ist das wachsende Interesse an einer Zusammenarbeit zwischen staatlichen Institutionen, der Privatwirtschaft und nicht-staatlichen Organisationen; bemerkenswert auch, wie die strikte Marktorientierung die aktuelle Diskussion über nachhaltige Tourismusansätze bestimmt. Schließlich wurde noch daran erinnert, dass der weltweite Urlaubstourismus nur ein Segment sei. Andere Tourismusformen müssten ebenso als Objekt der Entwicklungspolitik gesehen werden.

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## **The International Year of Ecotourism: An Opportunity to Enhance Marketing Methods**

**Eugenio Yunis, World Tourism Organization**

The purposes of this presentation is to briefly describe the World Tourism Organization's objectives and activities for this International Year of Ecotourism, and to highlight the opportunities it brings in terms of marketing and promotion.

The United Nations recognised the social and economic importance of ecotourism, by declaring the year 2002 as the International Year of Ecotourism. At the same time, the UN General Assembly wished to draw the attention of governments and the international community in general about the potential of this tourism segment to generate impacts, both positive and negative, on the natural environment, the conservation of biodiversity, and the social and cultural fabrics of host communities. Therefore, governments, the private sector, the host communities and the tourists are invited to exert greater efforts in order for ecotourism to become a mayor contributor to sustainable development, instead of posing a new barrier to sustainability.

The WTO has defined the following objectives for this Year:

- Generate greater awareness among public authorities, the private sector, the civil society and consumers regarding Ecotourism capacity to:
  - enhancing the conservation of the natural and cultural heritage;
  - improving the local communities standards of living in rural areas and in the surroundings of protected areas; and
  - encouraging a better knowledge of, and respect for nature, indigenous cultures and their diversity.
- Promote a sustainable development of Ecotourism, as an essential condition to generate the positive benefits expected from it.
- Disseminate methods and techniques for the planning, management, regulation and monitoring of Ecotourism to guarantee its long-term sustainability.
- Promote the exchange of successful experiences in the field of ecotourism.
- Increase opportunities for the efficient marketing and promotion of ecotourism destinations and products in the international markets.
- Promote minimum quality standards, as well as trustworthy and comparable certification systems for the Ecotourism suppliers.

To achieve these objectives, the World Tourism Organization, with the collaboration of other national and international agencies, is undertaking a wide range of activities, such as a series of regional conferences and seminars, market research and other publications on ecotourism, promoting the creation of multistakeholder national committees for the IYE in its 138 Member States, and convening the World Ecotourism Summit to be held from 19 to 22 May 2002 in Quebec, Canada. You are all invited to participate, contribute and benefit from these activities.

In connection with the marketing and promotion objective, the Organization undertook in the first place a series of market research studies of the main tourist generating countries, namely Germany, France, Italy, the United Kingdom, Spain, Canada and the United States of America. These studies are allowing us to evaluate the potential size of these markets, assess their growth poten-

tial, identify the consumer requirements and behaviour and understand better the marketing channels and promotional means in this market segment.

We thought this was a necessary task, since until now no such evaluations had been carried out using a common methodology and an objective perspective. Furthermore, no such studies had been made public and available to the international community at large. This meant that we had to agree on a common definition in order to reach comparable results in the seven country markets studied, and this we did in an interactive process with our team of experts. This is how we decided to use the concept of ecotourism to reflect “all forms of tourism in which the tourists’ main motivation is the observation and appreciation of nature, that contribute to the conservation of, and that generate minimal impacts upon the natural environment and the cultural heritage”. It would be important that the International Year serves also to achieve a major convergence in the interpretation of this term, and in its more rigorous commercial application.

A second activity that we considered important was to provide marketing and promotional support to small ecotourism operators from developing countries in their efforts to reach the wealthier markets of the Northern Hemisphere. Some NGOs have accused WTO and the whole concept of the International Year as being in favour of a further globalisation of the tourism industry and of large multinational companies. Nothing is more distant from the truth than these accusations and you are here to demonstrate it. It is precisely to maintain and strengthen the commercial viability of the small and micro ecotourism companies that we have organised, with the generous support of the German government, this forum and the participation of developing countries in this edition of *Reisepavillon*. The large companies are generally less interested in ecotourism, which is by definition of small size; and besides, they don't need our support to investigate markets or to promote their products.

The importance of adequate marketing is widely recognized within the overall tourism sector, as today the tourism market has become increasingly segmented and as the means of communication to reach consumers have multiplied and diversified. Marketing is indeed a key component of tourism destination planning and product design process.

In ecotourism, if we are not clear about our market opportunities, about the type of tourists we expect to attract to our destination and their requirements, then it becomes difficult to plan and design our attractions, our means of accommodation and other facilities we are going to offer to our clients. Similarly, if we are not clear about the right and most efficient promotional methods, we are likely to waste much more resources than needed to reach our consumers, and as a result make our product more expensive and eventually less commercially viable.

Our studies and the experience of the more developed eco-destinations have shown that those interested in a real ecotourism experience are generally more demanding than the average classical tourist in terms of:

- information before and during the trip,
- interpretation of the places visited, particularly in what refers to flora, fauna and the local culture,
- authenticity of the overall tourism experience, specially in the relationships with the local community and its culture,
- experiencing the local food.

On the contrary, eco-tourists tend to be less demanding in terms of hotel accommodation, although quality and hygiene have become essential ingredients required for all types of establishment.

The segmentation of demand should lead to segmentation of supply and of the marketing channels. Suppliers of ecotourism products and services should be more cautious in selecting their marketing channels and promotional means. Firstly, because they need to target their market segment very carefully in order to attract only the type of visitors who will share similar interests,

who will be equally respectful to the natural environment and the local culture, thus making the experience more meaningful to all of them.

Secondly, because the small size of their operations does not allow them to waste money in expensive promotional material, which by the way the potential ecotourist does not need. Thirdly, because suppliers need to find equally responsible commercial partners in the generating markets, who will help them in reaching the right consumers and who will not attempt to over-crowd the destination.

In summary, you must use all information available to understand your market targets and their constant evolution and changes. You must select the right tour operators abroad to become your partners. You must be equally selective in the choice of promotional means, advertising material and its distribution at the right type of tourism fairs. And above all, you must remain consistent with the initial objectives that lead you to establish an ecotourism activity; only thus will your customers feel fully satisfied, keep loyal to your destination and help you to attract similar visitors in the future.

In addition to these basic principles that are of universal validity and should be applied by all serious ecotourism destinations and suppliers, I would like to mention a few other recommendations that might be useful in some cases.

Joint marketing and promotion of ecotourism products and destinations, including community projects is extremely important. Shared marketing by neighbouring destinations brings economies of scale and creates awareness among tourists and foreign tour operators about the wider range of attractions existing in an area. This may serve to expand the marketability of each individual destination, to reduce marketing costs, and to extend the length of stay for the benefit of the community and of the industry. This will enhance the opportunity of bringing together groups of community ecotourism providers to share the cost of marketing and to provide itineraries of different length involving a number of community projects.

Ecotourism being a relatively new product that generates high hopes among consumers, care needs to be taken with new ecotourism products coming to the market. Improvisation, lack of professionalism, misusing nature or local cultures, and falling behind the tourists' expectations are firm recipes for failure; and a failure may lead to a loss of image and take several years to recover. It is important to behave professionally in what is being offered and to provide products that satisfy the market segments identified.

New technologies, especially Internet, undoubtedly have vast potential as a tool for marketing and promotion of ecotourism. In addition to its capacity for the massive dissemination of information, Internet also facilitates direct transactions between suppliers and consumers, and this is especially relevant for small suppliers. In countries like Italy and Canada this technology represents the main channel used by eco-tour operators.

Certification and eco-labels of ecotourism products and destinations can facilitate their marketing, but only when they are widely accepted and recognised by outbound operators and consumers, their contents is truthful and their credibility is high.

Great care should be taken in looking at the pricing structure of ecotourism products, as the constituent cost, group sizes and tour operator margins necessary to support low volume businesses vary considerably between operators, destinations and countries.

In addition to foreign visitors, it is important to draw attention to domestic markets, if necessary through subsidies, special pricing policies and incentive programmes; this will avoid the perception that these products are only for foreigners, but especially and to foster the role that ecotourism can play in educating locals.

Conservation organisations and other NGO's can play a major role in promoting, directly or indirectly through environmental education addressed to consumers, those products and destinations where ecotourism development is carried out in a sustainable manner.

Let me conclude these words by expressing two wills in connection with this International Year of Ecotourism. Firstly, that it becomes a landmark in the development of a genuine ecotourism industry. That such concepts as environmental education, nature conservation, safeguarding biodiversity, resurgence of vernacular traditions, revalidation of indigenous cultures, solidarity and transparency in the commercial transactions between suppliers and buyers, and sustainable development at the local level become the common practice in the industry. Secondly, that the Year serves more to initiate a process towards these objectives, rather than becoming an end in itself. This requires the creation of more permanent co-ordination structures at the local level, so that all local stakeholders are involved in the process and maintain the dynamics created by this Year.

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# Biological Diversity and Tourism: Towards International Guidelines

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## 1. Biological diversity and tourism within the Convention on Biological Diversity

The fact that tourism is expanding in all regions, including in remote and sensitive areas such as islands and new mountain areas, and Antarctica, and that the main areas where tourism is based include: small island developing states and coastal regions; mountains; species-rich and protected areas; and urban areas, emphasise the growing pressure on biological diversity.

Tourism has been discussed in the context of the Convention on Biological Diversity (CBD) as a cross-cutting issue for a number of years. The CBD was signed at the 1992 United Nations Conference on Environment and Development in Rio de Janeiro. With 182 parties ratified so far, it is the most successful environmental convention. The Convention has three basic objectives:

- Conservation of Biological Diversity
- Sustainable use of its components
- Fair and equitable sharing of benefits

At the fifth Conference of the Parties (COP5) in May 2000 in Nairobi, Decision V/25 on Biological diversity and tourism was adopted, which recognised that the scale and expansion of tourism has major implications for the conservation and sustainable use of biodiversity, and for attainment of the Convention's objectives. Decision V/25 noted the increasing importance of tourism for social and economic development at local, national and regional levels, and that, in relation to the provisions of the Convention on Biological Diversity:

- sustainable tourism depends on community involvement and participation,
- communities should benefit from sustainable tourism,
- tourism is closely linked to the preservation of a healthy environment, which in turn is an essential element of tourism development and helps to raise public awareness on some biodiversity issues.

An assessment of the interlinkages between biological diversity and tourism was endorsed. This included consideration of the economic importance of tourism and its interrelationship with the conservation and sustainable use of biological diversity, as well as the potential impacts of tourism on biological diversity, including economic, social and environmental impacts.

Furthermore, Decision V/25 accepted the invitation to participate in the international work programme on sustainable tourism development under the Commission on Sustainable Development process with regard to biological diversity, in particular, with a view to contributing to international guidelines for activities related to sustainable tourism development in vulnerable terrestrial, marine and coastal ecosystems and habitats of major importance for biological diversity and protected areas, including fragile riparian and mountain ecosystems, bearing in mind the need for such guidelines to apply to activities both within and outside protected areas, and taking into account existing guidelines, and requests the Executive Secretary to prepare a proposal for the contribution on guidelines, for example by convening an international workshop.

## 2. The ongoing process towards international guidelines

CBD Decision V/25 on Biological Diversity and Tourism is not the first attempt towards international guidelines. A wide range of international codes, guidelines, principles and position papers have been issued since 1975 on sustainable tourism, on biodiversity, and on the management of tourism and biodiversity, particularly in relation to protected areas. A selection of major international documents addressing different audiences are presented in the next table.

Table: Major international documents in relation to sustainable tourism and biodiversity (based on ETE 2001, amended).

<b>Document</b>	<b>Organisat on</b>	<b>Target Group</b>	<b>Focus</b>
<b>Charter for Sustainable Tourism</b>	Lanzarote, 1995	Countries, Institutions, Decision makers, Experts, Organizations, Tourists	General Principles
<b>Berlin Declaration</b>	Countries, EU, UNEP, GEF, WTO, IUCN, NGOs Berlin 1997	Commitment	Commitment, Biodiversity and sustainable tourism
<b>International Conference on sustainable tourism in Small Islands Developing States (SIDS) and other islands</b>	Lanzarote, Spain October 1998	Countries AOSIS, UNEP, WTO	Programme of Action for Sustainable Tourism in SIDS
<b>Agenda 21 for the Travel &amp; Tourism Industry</b>	WTTC, WTO / OMT, Earth Council 1998	Commitment Tourism Industry	Objectives, measures, presentation of best practice
<b>Global Code of Ethics for Tourism</b>	WTO, 1999	Actors in tourism, Tourists	Guidelines for the behaviour of tourists in destinations
<b>Work Programme for Sustainable Tourism</b>	Commission on Sustainable Development, 1999	All stakeholders	Measures, Objectives, Policies
<b>Statement of Commitment</b>	Tour Operators' Initiative for Sustainable Tourism Development, UNEP, UNESCO, WTO, 2000	Tourism Industry	Measures, Objectives, Policies
<b>Principles for the implementation of sustainable tourism</b>	UNEP, 2000	Authorities, Tourism Industry,	Measures, Objectives, Policies
<b>Guidelines on Community based Ecotourism Development</b>	WWF-International, 2001	WWF and partner organisations	Guidelines on Issues and Topics

### Milestones in the ongoing process towards international guidelines since the Rio Conference

- 1992** **Rio** Conference and the formulation of Agenda 21 (even though tourism as such is not one of the Chapters) have been in
- 1995** the **Lanzarote** Charter for Sustainable Tourism and the mentioning at the 2<sup>nd</sup> CoP of CBD in **Jakarta** of the necessity to plan tourism development in marine and coastal areas (already by that time, the German Federal Minister of Environment suggested in her speech to consider the development of international rules and regulation for sustainable tourism development);
- 1997** the **Berlin** Declaration at the Ministerial Conference on Biodiversity and Tourism, which provided the basis for an information document entitled “Biological Diversity and Sustainable Tourism – Preparation of Global Guidelines” which the German Delegation submitted in
- 1998** to the 4<sup>th</sup> CoP of CBD in **Bratislava**, where Decision IV/15 was adopted, requiring the parties to submit to the Executive Secretary information on basic aspects of sustainable tourism and biodiversity; in
- 1999** the Commission on Sustainable Development (CSD) at its 7<sup>th</sup> Session in **New York** adopts Decision 7/3 on tourism and sustainable development, which includes the adoption of the international work programme on sustainable tourism development and the invitation to CBD to “further consider, in the context of the process of the exchange of experience, existing knowledge and best practice on sustainable tourism development with a view to contributing to international guidelines for activities related to sustainable tourism development...”; the CBD at its 4<sup>th</sup> meeting of the Subsidiary Body on Scientific, Technical and Technological Advice (SBSTTA) in **Montreal** adopted recommendations entitled “development of approaches and practices for the sustainable use of biological resources, including tourism”, which provided the basis of the
- 2000** Decision V/25 at the 5<sup>th</sup> CoP of CBD in **Nairobi** (see above) upon which the Executive Secretary organised, with financial support of the German Federal Ministry of Environment and Belgium in
- 2001** the **Santo Domingo** Workshop on Biological Diversity in where draft international guidelines and recommendations for their use were elaborated and subsequently reported to the 7<sup>th</sup> meeting of SBSTTA in **Montreal** which adopted Decision VII/5 on Sustainable Tourism, requesting the Executive Secretary
- to transmit the elements for guidelines on biological diversity and tourism to the CSD serving as the Preparatory Committee for the World Summit on Sustainable Development for consideration at its second meeting, to be held in **New York** from 28 January to 8 February 2002; inviting CSD to report back to the 6<sup>th</sup> CoP of the CBD in April 2002 in **The Hague**;
  - to submit the elements for guidelines to the preparatory process for the World Summit on Ecotourism to be held in **Quebec City**, in May 2002;
  - to present these elements for the consideration of SBSTTA at a meeting prior to the 7<sup>th</sup> CoP of CBD in 2004; and
  - to organize an electronic consultation inviting further reactions to the text.

### **3. Draft International Guidelines for Activities related to Sustainable Tourism Development in Vulnerable Areas**

The International Guidelines for activities related to sustainable tourism development drafted at the Santo Domingo Workshop are intended to assist Parties to the Convention on Biological Diversity, public authorities and stakeholders at all levels, to apply the provisions of the Convention to the sustainable development and management of tourism activities. They will provide technical guidance to policy makers, decision makers and managers with responsibilities covering tourism and/or biodiversity, whether in national or local government, the private sector, indigenous and local communities, non governmental organizations or other organizations, on ways of working together with key stakeholders involved in tourism and biodiversity in order to contribute, *inter alia*, to functioning ecosystems; sustainable tourism in functioning ecosystems; fair and equitable sharing of benefits; information and capacity-building; restoration of past damage.

#### **a. Scope**

The guidelines cover all forms and activities of tourism, which should all come under the framework of sustainable development, in all geographic regions. These include, but are not limited to, conventional mass tourism, ecotourism, nature- and culture-based tourism, cruise tourism, leisure and sports tourism.

#### **b. Management process steps**

The management process needs to be undertaken through a multi-stakeholder process. Interdepartmental and inter-organizational structures and processes should be established to ensure coordination to guide policy development and implementation and to improve awareness and exchange of knowledge among stakeholders at all levels. A consultative process, based on multi-stakeholder participation, should be established to ensure ongoing and effective dialogue and information sharing and the stakeholder engagement and participation in the whole process. The establishment of partnerships should be encouraged.

The management process comprises ten steps for management of sustainable tourism and biodiversity:

1. Baseline information and review;
2. Vision and goals;
3. Objectives;
4. Review of legislation and control measures;
5. Impact assessment;
6. Impact management;
7. Decision making;
8. Implementation;
9. Monitoring;
10. Adaptive management.

#### **c. Notification process and information requirements**

Proposals for tourism development and activities at particular locations in relation to biodiversity, are to be submitted through the notification process.

Proposers of tourism projects, including government agencies, should provide full and timely advance notice to relevant authorities and all stakeholders who may be affected, including indigenous and local communities, of proposed developments through a formal process of prior informed approval.



Information provided should be made public, and public comment invited on all proposals for tourism development and activities.

Government response to notification of proposals for tourism development may range from approvals, with or without conditions, to refusal of the proposal. Further information from the proposer and further research by other agencies may be requested by Governments.

#### **d. Public education and awareness raising**

Public education and awareness raising campaigns need to be addressed to both the professional sectors and the general public to inform them about the impacts of tourism on biological diversity, and good practices in this area.

Public awareness campaigns will need to be tailored for various audiences, particularly stakeholders including consumers of tourism, developers and tourism operators. The private sector could play an active role encouraging conservation among clients.

Education and awareness-raising is required at all levels of government. Awareness should also be increased within and outside governments that vulnerable ecosystems and habitats are often located within lands and waters occupied or used by indigenous and local communities. It is also important to raise awareness within the academic sector responsible for training and research on issues regarding the harmonious interaction between biological diversity and sustainable tourism.

#### **e. Capacity building**

Capacity-building activities should aim to develop and strengthen the capacities of governments and all stakeholders to facilitate the effective implementation of these guidelines, and may be necessary at local, national, regional and international levels. Capacity-building activities can include strengthening human resources and institutional capacities; the transfer of know-how; the development of appropriate facilities; training in relation to biological diversity and sustainable tourism issues, and impact assessment and impact management techniques. Local communities should also be equipped with the necessary decision-making abilities, skills and knowledge in advance of future tourist in-flows, as well as with relevant capacity and training regarding tourism services and environmental protection.

Capacity-building activities should provide assistance to stakeholders in undertaking all the steps of the management processes and in strengthening mechanisms for impact assessment. Capacity-building should also include the establishment of multistakeholder processes and the training of tourism professionals.

Information exchange and collaboration regarding sustainable tourism implementation through networking and partnerships between all stakeholders affected by, or involved in tourism, including the private sector, should be encouraged.

### **4. Recommendations and outlook**

While the guidelines were developed focusing on vulnerable terrestrial, marine and coastal ecosystems and habitats of major importance for biological diversity and protected areas, they are appropriate for tourism and biological diversity in all areas. The participants of the Santo Domingo Workshop strongly recommended that the guidelines should be demonstrated through the implementation of pilot projects, including new or existing projects.

Parties should be actively encouraged to submit to the Secretariat reports and cases-studies on the findings of such projects which could be based on different levels of protection and tourism development impact in different types of ecosystems.

The German Federal Ministry of Environment has commissioned two pilot projects in Slovakia and Colombia to demonstrate the guidelines. UNESCO's MAB-Programme also invited proposals for pilot projects initiating the demonstration of the guidelines in the World Network of Biosphere Reserves.

The Secretariat of the Convention on Biological Diversity will publish a summary booklet of the guidelines in all UN languages. The results of the electronic consultation and demonstration projects as well as the feed-back from the CSD PrepCom and the World Ecotourism Summit will continue to be discussed in the different CBD-fora with a view to revising the draft guidelines for eventual endorsement at a Conference of the Parties, possibly in 2004.

Notwithstanding the fact that the guidelines have not yet officially been endorsed: Governments, international institutions and development agencies should take the draft guidelines into account in their policies, programmes and activities, and support their implementation through technical assistance, especially in but not limited to developing countries, and should encourage the exchange of experiences and lessons learned concerning their implementation.

Monitoring and assessment of these guidelines need to be developed and periodic reviews of the guidelines have been recommended. This could be done to some extent in the framework of the CBD – which has contracted an officer especially for the issue of Biodiversity and Tourism. However, it could also be thought of establishing or using a wider forum within the United Nations family which would allow the participation of all major stakeholders in the process.

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# **Fair Trade Tourism in South Africa: Some Proposals for Multi-Level Co-operation to Ensure the Proper Implementation of Responsible Tourism**

**Johannes Baumgart, GTZ - TRANSFORM, South Africa**

## **1. Introduction**

This paper uses the notion of “fair trade” as a catchword to describe various initiatives that aim to devise and implement responsible forms of tourism in South Africa (SA). The concept of fair trade is well known outside the tourism world. It originated in the trade of certain forms of food and became quite famous for generating more favourable economic returns to certain food producers in developing countries. The same objective is intended by the fair trade in tourism movement but in the case of tourism, brings social and ecological components together with economics in order to create a set of guidelines for tourism that encourage “responsible” conduct by tourists and tour operators toward people, cultures and to nature. South Africa has recently undertaken an enormous task to draft a comprehensive set of responsible tourism guidelines in a very participatory manner. We describe here the South African experience, its benefits, problems, the effects these are likely to have on different levels of participants in the tourism business and some possible solutions to the problems identified. The possible solutions focus on multi-level co-operation between all sectors involved in tourism.

## **2. Background: the strategic role of tourism in the South African economy and the emergence of codes for responsible tourism**

### **2.1. The strategic importance of tourism in the South African economy**

By the early 1990s, South Africa’s tourism industry had come to assume a strategic importance in the political economy of the country. The potential of the sector to generate jobs, thus dealing with the single biggest social and economic problem facing the country during its transition to democracy, was highlighted in a 1998 report, entitled *Benchmarking South Africa for Labour Intensive Development: International Lessons and Strategic Implications*. The report argued that tourism – especially travel to the wild outdoors, adventure and sport – had more potential to create new jobs than any other form of economic activity in the country. It emphasised that tourism had the potential for creating 450,000 new jobs by the year 2005. The other most important economic fields were expected to create only 150,000 new jobs within the same period. The report thus gave tourism a massive 75% of the job-creating potential in South Africa’s current economic circumstances. Other reports confirm that tourism has become “one of the key drivers for job growth, wealth creation and economic empowerment”.

The optimism of these reports was based on data at the time, which indicated that SA was enjoying the longest period of tourism growth in its history. 1999 marked the eleventh successive year of increased overseas visitor arrivals, which grew at a compound rate of over 15% per annum during the preceding decade. The growth in international tourism came on top of a large, established domestic tourism market worth approximately twice as much as its foreign counterpart. It should also be noted that there has been a recent slowdown in the rate of growth in tourism contribution to the national economy. It is difficult to state if the reduction of growth is only a temporary phenomenon.

There is growing evidence that many of the tourists coming to SA are motivated by a desire to witness the political changes taking place in the country. A SATOUR research conducted among foreign visitors to SA in the mid-1990s indicated that when leaving the country, the characteristics which foreign tourists stated as having appealed most to them were: Scenic beauty (51%), political change (28%), climate (26%), wildlife (21%), South African cultures (18%). The conventional notion that foreigners visit South Africa mainly for its wildlife needs to be revised in the light of these figures. They show that the country's political transformation, diverse heritage and culture together accounted for 46 percent of foreign tourist's motivations, second only to scenic beauty and far in excess of factors such as climate and wildlife. This trend is being reinforced and shows a growing interest of foreign tourists for responsible tourism. On the other side there is little knowledge about South African domestic tourists' behaviour and attitudes towards these questions.

## **2.2. Some evidence that the market place may favour responsible tourism to South Africa**

Along with these indications are some research findings that show a growing group of enlightened travellers (mainly in Europe and North America) with an interest in ethical and responsible forms of tourism bringing benefit to the poorer sections of the population and promote social development in a country going through transformation. Several studies show a growing interest and consumer support for "people – first" and ecologically sustainable tourism. These reports also emphasise the expressed needs of tourists to obtain more information on cultural and livelihood issues of the people, whose areas they visit.

Recent research conducted by consultants for South Africa's Department of Environment Affairs and Tourism (DEA&T) found 59% of tourists were willing to spend more on their holiday to SA, if this add-on went to conservation of the local environment, if workers at the destination were paid proper wages and experienced good working conditions and if the money went to support a local charity. Whether this will be put into practice by a fair number of tourists or if it is just a well-intended emotion remains to be seen.

Here it should be stressed that these are early indications of a market-place trend in support for ethical forms of tourism. We should be careful not to overstate this trend, certainly until there is more exhaustive research to indicate the validity of the patterns described above. Detailed research needs to explore very deeply questions such as which segments of tourism consumers favour responsible tourism, where do they come from, what is their specific interest and what are they willing to spend on responsible tourism forms? In addition these studies need to take into account the fact that different developing countries have different source markets, many of them not only in Northern Europe or North America. It may well be that the clients open to responsible tourism come from a couple of northern European countries, which have rather high social and environmental standards in tourism themselves and a highly developed conscience for these issues in their population. Market intelligence for responsible tourism thus needs to take into account the growing importance of tourism from Japan, India, East Asia, China and other countries where support for responsible tourism may not be as deeply rooted as in Europe and North America.

Up to now most of the research is drawn from international tourism flows and leaves many questions about the importance of domestic tourism and about South African consumers' behaviour. This leaves the suspicion that responsible tourism issues are intended to be addressed mainly with reference to foreign tourists and tour operators, whereas there is a growing domestic tourism market in South Africa. The impacts of this domestic market need to be addressed through environmental and social awareness programmes for national tourists.

And we should be aware of the dangers of seeking out only the results that favour our desire to promote fair forms of tourism – and at all times be aware that there may be strong market-related pressures to run tourism businesses along established non-responsible lines.

### **3. Emerging standards for responsible tourism in South Africa**

#### **3.1. Early attempts to set standards for ethical and fair tourism in South Africa**

Given the vital importance of tourism in helping to ensure the success of South Africa's democratic transition – and in the light of some evidence that a growing number of travellers are likely to pay more for their holidays – it is not surprising that there have been a number of recent attempts to set standards for responsible, fair or ethical tourism in SA.

A handful of companies in South Africa have subscribed to the Green Globe, which certifies companies as performing within certain sound environmental standards. In the year 2000 there was an innovative attempt by South Africa's leading nature tourism lodge development and operating company, Conservation Corporation Africa, to enter into a strategic partnership with the National Geographic Society with the aim of establishing a strategic alliance between the two companies to promote ethical forms of ecotourism. But this alliance did not materialise.

Another development has been in the area of protecting South Africa's renowned beaches from pollution and over-use through tourism. In 2001, a non-governmental organisation, the Wildlife and Environment Society of South Africa (WESSA), became the first organisation outside Europe to join the Blue Flag certification programme. While certified beaches must comply with all criteria in 14 different groups, WESSA tailored the criteria to take into account South Africa's unique geographical conditions and social issues.

Then of course there is the Fair Trade in Tourism initiative, which is active in SA. Details are not presented here as FTT is familiar to most delegates and as it will be portrayed elsewhere in this event. Suffice to say that Fair Trade respects the basic market rules and focuses on encouraging a fair share of the tourism transaction for all. The basic definition is underpinned by three core concepts: "fair share", "democracy" and "sustainability".

#### **3.2 Government's new responsible tourism guidelines**

More recently the DEA&T initiated a process of developing responsible tourism guidelines for the South African tourism industry. The timing for this initiative in SA is linked to the May 2002 International Year of Ecotourism summit and the World Summit on Sustainable Development and is based on an assumption that these meetings will provide ideal platforms for South Africa to promote the guidelines

The initiative takes as its starting point the South African government's White Paper "Development and Promotion of Tourism in South Africa", published in 1996 after an intensive stakeholder consultation process with the tourism industry and wider society. The White Paper is summarised in Box 1 below. The process of drafting the guidelines, which are drawn from the principles of the White Paper, started in November of 2001. A widely discussed and edited version is now available for the interested public. In short the guidelines contain a comprehensive set of strategies to ensure:

- Economic standards
- Social guidelines that promote empowerment and capacity building
- Human rights standards
- Environmental guidelines.

These guidelines depend on a series of actors in the tourism industry (including government, the private sector, NGOs and civic or community based organisations), who have to agree on the use, the monitoring, eventually update of the guidelines and have to implement them. To make them work will not be an easy task.

**Box 1: Principles and elements taken from the 1996 White Paper on the  
*Development and Promotion of Tourism in South Africa***

Responsible Tourism is the key guiding principle in the White Paper for tourism development. It takes “a proactive approach by tourism industry partners to develop, market and manage the tourism industry in a responsible manner so as to create a competitive advantage.” In addition, “It recognises the responsibility of the government and private sector to involve the previously neglected in the tourism industry.”

**Key elements are to:**

- Market tourism that is responsible, respecting local, natural and cultural environments.
- Involve local communities through meaningful economic linkages and to use tourism as “a development tool for the empowerment of previously neglected communities” and particularly on the empowerment of women in those communities.
- Involve the local community in planning and decision-making.
- Assess economic impacts as a prerequisite to developing tourism.
- Ensure communities are involved in and benefit from tourism.
- Respect, invest in and develop local cultures and protect them from over- commercialisation and over-exploitation and to involve local communities in the tourism industry “to practise sustainable development and to ensure the safety and security of visitors”
- Maintain and encourage economic, social and cultural diversity.
- Be sensitive to the host culture.
- Assess social impacts as a prerequisite to developing tourism.
- “Responsibility of both employers and employees in the tourism industry both to each other as well as to the customer,” including responsible trade union practises.
- Show responsibility to the environment.
- Maintain and encourage natural diversity.
- Avoid waste and over-consumption.
- Use local resources sustainably.
- Assess environmental impacts as a prerequisite to developing tourism.
- Responsibility of tourists to “observe the norms and practises of South Africa, particularly with respect to the environment and culture of the country.
- Monitor impacts of tourism and ensure open disclosure of information.

## **4. Problems in making responsible tourism work**

### **4.1. Who are the actors?**

A multitude of actors are participating in tourism, and many of them are competitors for the same market. This fact makes the setting and the monitoring of guidelines rather difficult and lengthy. The actors range from international organisations, governments, tourism boards, large hotel chains and small enterprises to the clients and the local people who are affected by tourism in their area.

### **4.2. Problems on the global level**

An intensive international discussion concerning certification of standards for responsible tourism is currently taking place. Here, for the sake of accuracy, it should be noted that “certification”

refers to a procedure whereby an independent third party conducts an audit and gives formal assurance to the market place that a product or an establishment conforms to specific responsible criteria.

A quick view on the international scene shows that certification is currently one of the hottest issues within tourism, with dozens of new schemes in development and many studies done or in process. But it remains a very fluid and ill-defined concept with a number of challenges and problems related to it. Key issues that have emerged are:

- From the available research it appears that interest in certification programs based on environmental and social criteria – and the willingness to subscribe on a financial basis to such a scheme – is stronger in the nature tourism/ecotourism sector than it is in the mass tourism sector.
- But, as noted above, the available research about market trends regarding demand for responsible tourism is not yet conclusive and needs to be conducted in a much more robust manner and needs to take into account sectors and segments of the global tourism market other than only Europe and North America.
- There are many global certification schemes in the tourism sector but there is no single major global brand for nature/ecotourism or mass tourism. Globally, there are over 100 programs in practice or in planning and in Europe, some 50 programmes in the mainstream tourism sector.
- The marketing effectiveness of these schemes is undermined because there is such a proliferation of them. No one brand stands out and consumers are confused about what they mean.
- There is a need for industry to voluntarily join such schemes (i.e. there is a widespread recognition that industry cannot be coerced into implementing responsible standards) but self-regulation tends to fail and easily becomes a “greenwash” exercise. While there is a need for incentives to encourage adherence and a need for sensitivity to the needs of industry, there is also a strong need for independent monitoring and auditing of companies that claim to abide by responsible tourism standards.
- There is a vital need for auditing and monitoring to be non-partisan and fair if it is to be assured of credibility among consumers and the private sector.

### 4.3. South African problems

Many of the above problems apply to SA and, in particular to the DEA&T guidelines as well as FTT initiatives in SA.

**Problems with industry:** While the DEA&T draft standards are extremely progressive and comprehensive, they lack any mechanism for enforcement. The government has so far made it clear that it will rely only on voluntary adherence to these standards by tourism players. No provision is made for an independent auditing exercise or for a certification programme that will provide a credible and recognisable brand that companies who adhere to the standards can make use of. It is also likely that the standards will be either ignored or resisted by some sectors of the tourism industry in SA. Experience with a new grading scheme for hospitality standards in SA recently shows this danger. It is quite possible that a similar pattern could affect the new responsible tourism guidelines.

**Problems within government:** While the DEA&T has developed a very commendable set of guidelines, it is clear that many levels of government lack both the will and the capacity to enforce these standards. This is made worse by the fact that government is fragmented. There are numerous indications that provincial and local government, operating at the level where policy needs to be implemented, is not able to implement these and other policy guidelines because they have far less capacity and resources than national government departments. The stress on, and provision

for, capacity building and training within government will help to solve this problem in the long run, but for now there is a real danger that the proposed responsible tourism standards will be adhered to rhetorically rather than in reality. In local government the capacity to run effective tourism promotion and monitoring the guidelines is practically absent. The lack of ability to audit independently, to monitor, to create incentives for adherence to the guidelines and to enforce standards is a critical issue that may undermine the effectiveness of the standards.

**Problems and challenges of civil society:** The above problems raise a set of challenges and opportunities for civil society organisations (NGOs, community organisations and support groups) to minimise the problems with implementing responsible tourism in South Africa, and for ensuring that those standards become practise.

However before going on to make some suggestions in this regard, we should reflect on some problems that affect civil society organisations – including FTT – when it comes to setting standards for fair and ethical tourism. Firstly, many civil society organisations lack the resources to attach their campaigns to larger well recognised certification programmes and thus their campaigns remain on the fringes of the world’s second biggest industry, appealing to the converted rather than to the mass of consumers and tourism operators. Secondly, some civil society organisations are notorious for a high degree of partisanship and subjectivity in terms of the way they brand or label tourism enterprises or destinations as being responsible or irresponsible, fair or unfair. This leads to a lack of credibility in global and local arenas. And, finally, the civil sector is marked by fragmentation and has not yet demonstrated an ability to come up with a single, co-ordinated approach to the certification and labelling of responsible tourism in SA.

## **5. Suggested solutions: Co-operation between all actors to achieve implementation of guidelines**

The following are a preliminary and tentative set of ideas, presented here for discussion and debate rather than as a blueprint, about ways in which the problems associated with implementing responsible tourism guidelines in South Africa can be overcome.

### **Government co-operation with the industry and research**

DEA&T is quite aware of its weakness and inability to enforce these guidelines. The idea is not to create a government-driven monitoring system nor join international “certification schemes” but to motivate tourism industry to be co-operative in using these guidelines as a framework of creating its own standards and code of conduct and set up systems of self-control. According to DEA&T officials there is a fair chance that most of the tourism associations are willing to go this way. But doubt about whether this reliance on voluntary implementation of the guidelines can be successful is emerging.

Government should strengthen and deepen its research about tourist behaviour and other aspects of responsible tourism (as suggested above) in order to come up with better solutions and to have a solid feedback as to what the market acceptance of such guidelines is. Research should also be made concerning the best practices of international schemes of certification and accreditation and if it could be feasible to join an international scheme.

### **Co-operation within the different levels of government**

As shown above, the tourism sector has the biggest growth potential in South Africa’s economy. In order to make the best use of this potential, national government should concentrate on policy



making and steering rather than executing responsible tourism programmes. It needs to decentralise a number of actions and control to the levels that are close to where tourism happens. High importance should be given to capacity building (financial and technical) in local government, some of which is happening but on a haphazard and patchy basis.

### **Incentives for tourism establishments to abide by responsible tourism**

There should be a strong set of incentives for private sector tourism operators, establishments, companies and projects to abide by responsible tourism standards. The best way to ensure this is to demonstrate the commercial value of doing so – to show that it makes economic sense for companies to do this. This requires a programme that systematically gathers research findings indicating positive consumer attitudes to responsible forms of tourism and communicates these findings to all sectors on industry.

### **Concerted action by civil society**

There is clearly a need for civil society organisations in South Africa to get co-ordinated and to adopt a common stance with regard to the implementation of responsible tourism standards in South Africa. Civil society organisations should set aside their divergent discussions and find a strategy to merge their efforts with official and private sector action and play a pro-active role in developing and implementing a fair auditing and monitoring process.

### **Links to a global or regional certification and/or accreditation programme?**

Codes of conduct and responsible tourism guidelines will remain marginal and ineffective unless they have global recognition or clout in the market place. While this is certainly true it does not necessarily mean that everybody must join under the same umbrella, or enter the same “big tent”. There are problems related to worldwide schemes. They become rapidly bureaucratic, inefficient and risk setting lower standards in order to satisfy a multitude of participants. The setting up of a certification scheme valid for countries in the SADC region, which have rather similarly structured tourism economies and similar issues to deal with, may be more feasible and manageable. But here again this kind of regional co-operation must be thoroughly studied to know the similarities and divergences as well as the problems and potentials. South Africa’s strategy for responsible tourism should thus focus on plans to:

- Implement the guidelines effectively and get buy-in of tourists, operators, tour guides, hotel industry etc.
- Create the links to SADC countries if this is feasible.
- Find an efficient and affordable monitoring system.
- Make these efforts known to a worldwide public in order to mark the difference to other countries and/or regions.

### **The need for proper auditing and monitoring**

In addition to the creation and effective management of a recognised certification process, there is an obvious need to set up a proper auditing and monitoring process. This should be cost-effective but professional and credible. We should possibly look at setting up a regional auditing agency to audit and monitor responsible tourism in the SADC region. This agency could operate on the principles of rapid, low-cost but credible monitoring making use of tourists as well as NGO networks in the region to check on whether tourism companies are implementing standards they claim to adhere to. The agency could be made up of representatives from governments, industry and civil society and could be funded by a mix of private, public and donor grants.

There is no doubt that such regional alliances and cross-sector partnerships imply certain risks like national egoism, industry opposition and NGO difficulties to link with government and industry in a common scheme. While a SADC-based agency would do the actual auditing and accreditation on a regional and cost-effective basis it could link to the global process being investigated by the Sustainable Tourism Stewardship Council, a process described in other papers presented at this event.

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# Ecotourism as a tool for Sustainable Development: Perceptions and Activities related to the International Year of Ecotourism

Oliver Hillel, UNEP, Tourism Programme Coordinator

## 1. What is ecotourism?

Although the first mention of the word ecotourism is set around the late 70s and the early 80s, its main components are rooted in history. Some components of ecotourism (as seen below) can be found in many previous forms and philosophies of tourism.

### Components of Ecotourism

- Contributes to conservation of biodiversity.
- Sustains the well being of local people.
- Includes an interpretation / learning experience.
- Involves responsible action on the part of tourists.
- Is delivered to small groups by small-scale businesses.
- Requires lowest possible consumption of non-renewable resources.
- Stresses local ownership and business opportunities, particularly for rural people.

For UN organizations, there seems to be a consensus that ecotourism, and the activities related to the Year, are to be taken within the broader framework of sustainable development of tourism overall, with four main motivations:

- Sustainable use of biodiversity and natural resources
- Impact minimization, especially in terms of climate change and energy consumption.
- Empowerment and fully informed participation of local stakeholders, particularly local communities and indigenous peoples.
- Awareness raising and environmental education of travellers and hosts.

Ecotourism may be said to have three aspects:

- a **concept**. Based on a set of so-called aspirational principles, it sets out an ideal to be targeted at. As such, it's very useful as a goal to be targeted.
- a **market segment**. Linked to nature and adventure tourism, it's a relatively small niche market, mostly for small- and medium-sized companies and for small groups of discriminating tourists. As such, it can be studied and analysed, although little statistical investigation has been made. In spite of the high goals set up by its aspirational aspect, ecotourism cannot help being part of a global economic and political system which has very often led to income and capacity gaps and divides, and many actual ecotourist products do not fulfil the principles set up above.
- a practical **laboratory** for pioneering ideas and practices potentially applicable in mainstream tourism. In the 80's, some ecolodges in Costa Rica and in Africa started setting aside private reserves for their guests' enjoyment. Today, the 200-room Punta Cana Beach and Golf resort in the Dominican Republic has a 150 hectare rainforest reserve, managed

by an Ecological Foundation. Based on ecotourism experiences, cruise tourists are being sold ecotours in Saint Lucia, theme parks in the US attempt to replicate nature experiences, and zoos make visitors feel they are part of the animal's environment.

- Canopy walkways, used first for scientific purposes, are now widely used as ecotourism attractions, and receive hundreds of thousands of visitors yearly all over the world. Over the years, as the concept has been applied under very different circumstances, some regional differences can be perceived. Several stereotypical “schools of thought”, based on different cultural and historical circumstances, could be proposed in a global overview:
- From **North America**, backed by a philosophy of admiration for nature as ultimate perfection (Thoreau and others), comes the idea of visitation to parks totally undisturbed by human settlements. In some cases, the notion of nature as a stand-alone balance that should be protected from any human interference has led to systems that propose to relocate residents. As a haven against the kind of uncontrolled development reigning in most other places, parks are seen as carefully managed areas where limited exposure to nature can be offered to the educated public under more or less strict management rules – in fact, management systems found in the US and Canada are well tested, and have been used as references for many other national systems. Also, in the US, given the unparalleled advance of the paradigm of the State more as a regulator than an agent, many effective models of public/private partnerships to manage protected areas – concessions, land leases, opportunities for entrepreneurs – can be found. The concept of nature interpretation (Tilden), where the most essential environmental messages are communicated emotionally as well as through information, by a variety of means including, as far as possible, an interactive participation of the visitor, has been developed mostly in the US, and some of the most advance technology as well as leading experts are there.
- In **Europe**, the natural landscape has been managed with human interference for ages, and ecotourism relates closely to rural tourism. Natural settings always have had local culture and inhabitants as components of the landscape. As the models of agricultural production change over time, and the subsidies set up to help European agriculture remain competitive prove to be very expensive, the need for supplementary income sources has paved the way for opening remote homes and farms to urban visitation, with positive results especially in economically depressed areas. Also, the experience of associating the image and the actual experience of a place to the products originating from it (the notion of the French “terroir”, or the ecolabels for water, handicraft, wine and food from certain natural areas) has helped to add value and shorten distribution channels. This has been very successful by promoting local Small and Medium Enterprises, the core of any sustainable tourism policy. Successes with Bed&Breakfast reservation systems, or with the Gites de France mechanism, can be immediately related to ecotourism. With most of its areas inhabited by diverse social groups, Europe also has great experience in participative land use planning (regional parks), and multi-stakeholder management systems. In a recent research by UNEP, most of the municipal destinations using Local Agenda 21 systems for tourism were to be found here. The notion of “fair” and “pro-poor” tourism also is stronger with European outbound tourism actors than elsewhere, and indeed the first critiques about the negative social and environmental impacts of tourism have originated here in the 70s. The continent also benefits from having the largest proportion of potential outbound travellers close to rural/natural areas, therefore increasing so-called ecotourism FITs (frequent independent travellers) and allowing value-added distribution chains. Ecotourism is therefore an extremely useful and important concept in the European context.
- In **Southeast Asia, Africa and Latin America**, apart from the obvious attractiveness of destinations, the many problems associated with unequal development and control of capital development become very significant. In regions where pronounced poverty coexists with quick and strong development, issue such as indigenous land rights, informed par-

ticipation of local communities in ecotourism ventures, and the serious risks of “greenwashing” ecotourism come up strongly.

- Many grass roots NGOs particularly in Southeast Asia associate ecotourism to alienation of the rights to the use of land and natural resources in benefit of major economic and political groups. This also happens as indigenous and local communities in some destinations are poorly empowered, and often don't participate in policy decision-making. Centrally planned, low-participation ecotourism projects can become examples of unsustainable development and may stir serious social and environmental problems. In many places, indigenous communities have only recently been accepted as an integral part of any ecosystem, and conflicts are still common. On the other hand, ecotourism in developing countries has also been relatively successful in ensuring political and financial support to the conservation of certain “charismatic” and accessible ecosystems and fauna, by offering steward communities and protected area managers an alternative (or sometimes exclusive) economic mechanism. In some cases, ecotourism projects have improved the community's sense of self-respect and the value of traditional cultural practices – in Cape Coast, Ghana, a traditional dance has been revitalized by a community due to the interest and financial support of visitors.

## 2. Facts, myths and challenges of ecotourism

### Facts

- To developing countries, one of the most important drivers for ecotourism is the generation of less-destructive and consumptive livelihood and employment for local residents, and financial means for the management of protected areas. Resource-poor governmental park management agencies find in ecotourism a much-needed source of income, either through direct management or via concessions to third parties, to the extent that in some cases they become tour operators or auction off parks to NGOs. Overall, though, under the right circumstances, *ecotourism has proven to be one of the most effective means to finance conservation* (the Kenyan “it stays because it pays”, the Rwandan Mountain gorillas, land concessions to operators in Zimbabwe and Botswana, Costa Rica's park system, the Philippines' Olango Bay project). In most rich biodiversity areas, actual revenue flows for ecotourism are better than non-timber forest products and bio pharmacy, and comparable only to agro forestry. Also, in some cases, ecotourism can provide much needed business and income opportunities for steward communities, and the negative effects of its implementation very often compare favourably to other alternatives. The creation and maintenance of hundreds of public, community-managed and private parks in developing countries can ultimately be linked to visitation revenues.
- **Some countries** (among them Costa Rica, Australia, Brazil, the Philippines, Dominica and Canada) *are using their biological and cultural diversity as an important tourism asset*, and ecotourism policy is a growth field. A recent report from the Organization of American States found that most of its member governments have only very basic ecotourism policies if at all, developed with relatively little consultation and with low levels of implementation. Similarly, many multilateral and bilateral development agencies have incorporated ecotourism as a tool, mostly within conservation and development investment pipelines, but a coherent system of exchanging lessons learned is still largely lacking. Weak or inconsistent policies can lead to inadequate application of the principles of ecotourism.
- In many cases, the concept of ecotourism can be misused by developers (public, non-governmental or private) to advance particular agendas without full consideration of its principles, in what is called “*greenwashing*”.

- Examples can include unregulated development of relatively undisturbed areas, subsidized loans or infrastructure development, appropriation of ancestral land domains, or just applying traditional tourism development models under the name of ecotourism (such as an 200-room ecolodge in the Brazilian Amazon with no sewage treatment, no involvement of traditional communities, and no effort at lowering any social or environmental impacts).

### Myths

- *Ecotourism is NOT particularly profitable*, and this might not change soon. In a recent research, the International Ecotourism Society has found that only a third of the 350 ecolodges surveyed are making any return on investments - a proportion very similar to most SMEs globally. It certainly does not compete with other tourism markets, such as the Meetings, Incentives, Congresses and Exhibitions, the theme parks and the cruise ship segments, also not hampered by high the expectations of ecotourism.
- For these and other reasons, *major global corporations are NOT yet interested in significant investments in ecotourism*. The more professional ecotourism developers, involving some medium-sized chains and ethically committed investment groups, are still finding ways to cope with investment guarantees, widely differing management standards and the absence of consistent statistics and sufficient professional capacity in the area.
- There is *no immediate risk of a global stampede of ecotourists* worldwide. 90% of UNESCO's 250 natural World Heritage sites are used well below their carrying capacity. The overwhelming majority of tourists are ambiguous about their commitment to conservation (like the idea, but are not willing to pay more for it) and their attitude towards any risk or discomfort on their vacation (like the perception of "roughing it" and risk in nature, but shy away from any real lack of comfort or uncertainties – the most frequent complaint of ecotourists in lodges in the Peruvian steaming hot Amazon is the absence of hot water!). Projections of a yearly increase of 20% on a market supposed to mean 3-5% of the overall tourism trade have not yet materialized (a good thing as it would mean 25% of global tourism in 2011 or 165 million international ecotourists), and probably won't. Of course, there is some risk in certain fragile destinations – tourism tends to focus on the tried and tested models, such as the Hollywood movie industry.

### Challenges

Most of the issues listed below, as well as the management systems that should be set up to advance them, could be addressed by a sound request from various stakeholders: the creation of *an International Commission on Ecotourism*, with representatives from various interest groups, broadly based on the model of the World Commission on Large Dams. For UNEP, the Year and the various events being organized could be the process to bring such a commission into existence.

- Financing the transference of the technology gained by North America and Europe in ecotourism (mobility, incubating SMEs, private/public partnerships such as concessions, protected area visitor management, multistakeholder planning, marketing) to developing destinations.
- Mainstreaming community-based ecotourism through efficient marketing and reservation systems, and increasing customer acceptance of products with basic quality standards. Beneficial effects are still too small to make a difference!
- Coordinate various donor investments in ecotourism, and produce guidelines for projects to avoid common problems (business feasibility, marketing research, entrepreneurial capacity, and private sector matching funds). Although a number of donors have incorporated ecotourism components in their project portfolios, little inter-institutional exchange is promoted.

- Creating and implementing common quality and operational standards, leading to certification and accreditation (avoid greenwashing!).
- Disseminating best practices in community land-use rights, and planning/development control mechanisms for steward (including indigenous) communities. Some good examples can be found in Africa ( land concessions in Namibia and Botswana), Europe (with Pan Parks and the Europarc Foundation).
- Improve local revenue retention through capacity building and value-added supply chain management.
- Convince pioneers to become professional.

Specifically for Europe, the International Year of Ecotourism could be used to propose an action plan to include:

- Generation of European standards for ecotourism products, leading to certification and even accreditation – in order to ultimate increase potential market shares.
- An increased independence of initially subsidized projects, such as rural tourism lodging and reservation systems – ironically, this might be more difficult in developed countries, where the State is well structured and can offer some welfare support, and motivation for entrepreneurship may be lower.
- Increased dissemination of successful components of existent projects, to support the transfer of technology, especially to Central and Eastern Europe.

This paper is a revised version of a presentation for the International Conference on Ecotourism in Mountain Areas, St. Johann/Austria, September 12-15, 2001.

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## **Projektreisen als entwicklungspolitisches Element – aus Sicht eines Reiseveranstalters**

**Klaus A. Dietsch, Studiosus Reisen**

### **Vorbemerkung**

Im Rahmen der entwicklungspolitischen Förderung von Ansätzen der öffentlich-privaten Partnerschaften (PPP, Public Private Partnership) hatten die Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) und Studiosus, unterstützt vom Studienkreis für Tourismus und Entwicklung e.V. und der Arbeitsgemeinschaft Entwicklungspolitischer Gutachter (AGEG), im Jahre 2000 Kontakt aufgenommen. Im Jahr 2001 wurden verschiedene Projekte der Entwicklungszusammenarbeit (EZ) im Hinblick auf ihr Potenzial für PPP sondiert und besucht, entsprechende Ansätze ausgearbeitet und evaluiert. Die Versuchsreihe wurde Ende 2001 erfolgreich beendet.

### **Basis**

Als grundsätzlich positiv für die Zusammenarbeit betrachtet Studiosus die ähnliche Unternehmensphilosophie; sowohl die GTZ als auch Studiosus betonen die "Partnerschaft als Unternehmensprinzip". Für beide soll sich aus den Synergieeffekten auch eine win-win-situation ergeben.

### **Partnerschaft**

- PPP ist im Aufwind: Das Verhältnis von Entwicklungszusammenarbeit (EZ) und Privatwirtschaft wandelt sich rapide. Unternehmen, die in fernen Ländern Geld verdienen wollen, brauchen dort politisch, wirtschaftlich und ökologisch stabile Verhältnisse. Die EZ fördert deshalb den Ausbau von tragfähigen Strukturen. Kein Wunder also, dass das gegenseitige Interesse zunimmt.
- Um das Studiosus-Motto „meet the people“ oder die Schaffung von Begegnungen mit der Bevölkerung vor Ort für unsere Kunden auszuweiten, gingen wir auf die Suche nach Kooperationspartnern: Goethe-Institute, Projekte kirchlicher Träger, schließlich GTZ. Beide arbeiten in Teilen nach der gleichen Philosophie.
- Elementar positiv: Von den fünf Kriterien der deutschen Entwicklungszusammenarbeit stimmen drei mit Studiosus vollkommen überein: Achtung der Menschenrechte, Beteiligung der Bevölkerung am politischen Prozess, Schaffen einer marktfreundlichen und sozial orientierten Wirtschaftsordnung.

### **Win-win-situation**

Win-win entsteht hier vorrangig durch Synergieeffekte. Oft liegen dem sehr unterschiedliche Interessen zu Grunde; aber warum sollen Initiator, Empfänger und Ausführende oder Teilnehmer von Anfang an harmonieren? Wichtig sind tragfähige Lösungen, deren Vorzüge allen Beteiligten zu Gute kommen.

Was bringt wer ein?

- Studiosus: Umfangreiche Kenntnisse der Geschichte, der Mentalität, der Kultur. Erfahrung und Kompetenz eines Reiseveranstalters.



- GTZ: intensive und vernetzte Kontakte zum Land. Erfahrung und Kompetenz in der Entwicklungszusammenarbeit.

Welchen Nutzen hat wer?

- Nutzen für die Einheimischen: Besucher ermöglichen echten Austausch. Durch das Besucher-Interesse kann das Selbstwertgefühl gestärkt werden. Neugier am Fremden kann befriedigt werden. Durch Dienstleistung (Führungen und Verkauf lokaler Produkte) neue Einkommensmöglichkeiten
- Nutzen für die Gäste: Plattform für Begegnungen. Zwanglose Möglichkeit zur Kontaktaufnahme mit Land und Leuten (laut Reiseanalyse von Kunden gewünscht)
- Nutzen für Studiosus: Bedürfnis der Gäste nach Begegnungen wird gestillt. Wir können unserem Motto „Einander verstehen“ näher kommen.
- Nutzen für EZ: Gezielte Öffentlichkeitsarbeit für entwicklungspolitische Maßnahmen. Den Gästen werden die Bedeutung und die Leistung von EZ vor Ort vor Augen geführt. Es wird sichtbar, wohin „die Steuergelder fließen“.

### Unternehmensphilosophie

Das Fundament für unseren nachhaltigen Tourismus, zu dem die Projektreisen wichtige Mosaiksteine formen, bildet die Unternehmensphilosophie. Hier ein paar Auszüge daraus:

Zum Thema "Einander verstehen" heißt es im Leitbild:

*„Studiosus will als unabhängiges Wirtschaftsunternehmen zum Kennen- und Verstehenlernen anderer Länder, Menschen und Kulturen beitragen. Wir sehen unsere Aufgabe darin, im Sinne einer echten Völkerverständigung Brücken zu schlagen über innere und äußere Grenzen hinweg.“*

Zum "Erhalt der kulturellen Vielfalt und der natürlichen Lebensräume" verpflichten wir uns folgendermaßen:

*„Es ist unsere Verantwortung, unseren Kunden das Kennen- und Verstehenlernen fremder Länder und Kulturen in einer - aus sozial verantwortlicher und ökologischer Sicht - zukunftsfähigen, d.h. nachhaltigen Form zu ermöglichen und die Ressourcen zu schonen. Dies wollen wir unter Berücksichtigung der Interessen und im Dialog mit der gastgebenden Bevölkerung verwirklichen.“*

Das "sozial verantwortliche Verhalten gegenüber den Gastgeberländern" kommt im Unternehmensleitbild u.a. hier zum Ausdruck:

*„Die gleiche Zufriedenheit, die wir bei Kunden und Mitarbeitern erreichen wollen, streben wir auch bei den Gastgebern an.“*

### Phasen der Zusammenarbeit

- Erarbeitung eines Konzepts durch GTZ, AGEG (Arbeitsgemeinschaft entwicklungspolitischer Gutachter) und Studiosus mit wissenschaftlicher Begleitung durch den Studienkreis für Tourismus und Entwicklung
- Suche nach geeigneten Projekten
- Reiseleiter-Schulung
- Praktische Evaluierung durch Besuche
- Ergebnisbericht

Grundlegend für die Suche waren folgende Kriterien: Es geht um den interkulturellen Dialog zwischen Gästen, Zielgruppen und lokalen Projektträgern. Die Projekte müssen abgeschlossen sein und nun von den Einheimischen selbständig und wirtschaftlich unabhängig geführt werden. Die

Gäste sollen in den Projekten etwas erleben, anschauen, gegebenenfalls auch essen oder kaufen können. Das Interesse des Gastes sollte immer im Vordergrund stehen. Die Pilotphase dauerte von September 2001 bis zum Jahresende.

Die Schulung der Reiseleiter bestand in einem Workshop mit den Reiseleitern (alle hielten das Projekt für sehr sinnvoll, da es Möglichkeiten zu lockeren und entspannten Begegnungen bietet); es folgt ein Training durch Fortbildungsprogramme und Seminare. Ferner wurde ein PPP-Projekthandbuch mit konkreten Hinweisen zur Durchführung solcher Reisen erstellt.

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# **Projektreisen als entwicklungspolitisches Instrument – Ergebnisse einer Maßnahme zur Förderung von öffentlich-privaten Partnerschaften (PPP, Public Private Partnership) im Tourismus**

**Dietlind von Laßberg, Studienkreis für Tourismus und Entwicklung**

## **Vorbemerkung**

Im Rahmen der entwicklungspolitischen Förderung von Ansätzen der öffentlich-privaten Partnerschaften (PPP, Public Private Partnership) hatten die Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH und Studiosus Reisen München GmbH, unterstützt vom Studienkreis für Tourismus und Entwicklung e.V. und der Arbeitsgemeinschaft Entwicklungspolitischer Gutachter (AGEG), im Jahre 2000 Kontakt aufgenommen. Im Jahr 2001 wurden verschiedene Projekte der Entwicklungszusammenarbeit (EZ) im Hinblick auf ihr Potenzial für PPP sondiert und besucht, entsprechende Ansätze ausgearbeitet und evaluiert. Die Versuchsreihe wurde Ende 2001 erfolgreich beendet.

## **Ziel der Maßnahme**

Ziel der Maßnahme war es, in kontrollierten Pilotfällen zu prüfen, inwieweit bestehende oder abgeschlossene EZ- Projekte für entwicklungspolitisch relevante PPP-Maßnahmen im Rahmen von Studienreisen geeignet sind. Dabei war seitens der GTZ auch wichtig, dass sich Urlauber während einer Urlaubsreise mit dem Thema Entwicklungspolitik/-zusammenarbeit auseinandersetzen und sich ein eigenes Bild machen können von einem Projekt der Deutschen EZ. Für Studiosus war es wichtig, authentische Begegnungs- und Kontaktmöglichkeiten zwischen Einheimischen und Urlaubern während einer organisierten Urlaubsreise zu realisieren.

## **Durchführung des Projektes**

Um dieses Ziel zu erreichen wurden folgende Schritte bzw. Maßnahmen durchgeführt:

1. Entwicklung eines Untersuchungsdesigns
2. Auswahl und Recherche von mehreren geeigneten Projekten in zwei ausgewählten Reisezielländern (Tunesien und Thailand), Einbau in Reiseprogramme von Studiosus
3. Ausarbeiten eines Besucherkonzepts
4. Schulung der Reiseleiterinnen und Reiseleiter zu Themen der Entwicklungszusammenarbeit sowie in Bezug auf das Besuchskonzept, Logistik
5. Durchführung der ersten Projektbesuche in Tunesien und Thailand (insgesamt 13 Reisegruppen)
6. Evaluierung der Projektbesuche (teilnehmende Beobachtung bei drei Projektbesuchen,
7. Ex-Ante/Ex-Post-Befragung der Urlauber, Reiseleiterbefragung).

## **Ergebnis**

Die Arbeitsschritte konnten problemlos durchgeführt werden. Im folgenden sind die Erkenntnisse dieser PPP-Pilotmaßnahme zusammengefasst.

Für einen gelungenen Besuchsverlauf sind folgende Voraussetzungen notwendig:

- ein wirkliches Interesse, Aufgeschlossenheit und Offenheit bei allen Beteiligten (Gastgeber im Projekt, Gästegruppe, Reiseveranstalter)
- durchdachte Projektauswahl
- schlüssiges Konzept für den Besuchsverlauf (Begegnungen, kleine Erlebnisse, sonstige kleine Events etc.)
- Schulung/ gute Vorbereitung der Reiseleiter und der „local guides“ auf den Projektbesuch und das Besuchskonzept (persönliche Orts- und Projektkenntnis erscheint als besonders wichtig)
- Identifikation von Projektverantwortlichen und anderen Personen, die in den Projektbesuch eingebunden werden
- präzise, klare Einführung/Einbindung der Projektverantwortlichen vor Ort und mehrerer Mitarbeiter in Zielsetzung/ Verantwortung für die Projektbesuche; Deutlichmachen der Erwartungen der Gäste, Vermittlung der Philosophie und des Besuchskonzeptes
- klare Abstimmung des Besuchsverlaufs, keine Zufälligkeiten (wer macht wann, was, wo, wie?); ggf. Vermittlung von didaktischen Grundkenntnissen
- Klärung/Organisation der Sprachfrage (Kleingruppen)
- Klärung der Frage der Entlohnung für gewisse Dienstleistungen (Imbiss, Tee, Früchte etc.)
- gute Vorbereitung/ Einführung der Reisegruppe auf Projektbesuch (Neugierigmachen, Aktivieren, Informieren)
- kompetente Reflexion der Erlebnisse, Nachbereitung/ Fragemöglichkeiten.

Die Ergebnisse des Projekts wurden insgesamt sehr positiv bewertet. Studiosus hat vor dem Hintergrund der gemachten Erfahrungen entschieden, weitere geeignete Projekte der EZ (auch solche von kirchlichen und anderen Trägern) in seine Reiseprogramme einzubauen. Die GTZ will die Ansätze aktiv weiterverfolgen und die Zusammenarbeit zwischen EZ- Projekten und Reiseveranstaltern fördern.

## **Erkenntnisse und Erfahrungen in Stichworten**

### **1. Chancen und Risiken beim Besuch von Entwicklungsprojekten durch Reisegruppen**

#### **Chancen:**

- Begegnung als authentische Erfahrung – Kontakt zwischen Gästen und Einheimischen
- Erlebnismöglichkeit – mit mehr oder weniger allen Sinnen
- Interesse der Gäste an der Thematik „Entwicklungszusammenarbeit“ wird befriedigt, Chance für andere, differenziertere Sichtweise von Entwicklungszusammenarbeit (EZ ist hilfreich und wichtig) – Beitrag zur entwicklungspolitischen Bewusstseinsbildung
- Revidieren, überdenken von Vorurteilen / Klischees / negativen Vorstellungen über Entwicklungszusammenarbeit
- „interkulturelles“ gegenseitiges Voneinanderlernen
- Stärkung von globalen Vorstellungen, Mitverantwortung für das, was in anderen Teilen der Erde geschieht
- Chance für eine authentische, strukturierte und reflektierte Darstellung von EZ- Projekten; entsprechende Schulung der Projektmitarbeiter
- Einblick in Projektdynamik, -problematik, -erfolge und -misserfolge seitens der Gäste;

- ggf. kleine wirtschaftliche Vorteile für ansässige Einheimische/ Projektmitarbeiter, z.B. durch Verkaufsmöglichkeiten, Vergütungen von Dienstleistungen, Honorierung der Projektbesuche
- Beitrag der Reisebranche zum sozialverantwortlichen, nachhaltigen Tourismus.

#### **Hemmfaktoren/ Risiken:**

- noch wenig beispielhafte Konzepte/Erfahrungen für/mit solchen Begegnungen
- fehlende gemeinsame Sprache/ Möglichkeit des Miteinanderredens
- Situation vor Ort nicht optimal vorbereitet, Chance nicht genutzt
- Reiseleiter ist auf das Thema „Entwicklung“ bzw. „Entwicklungszusammenarbeit“ nicht vorbereitet
- Reiseleiter bereitet Gruppe nicht optimal auf das Thema bzw. den Besuch vor
- Projektleiter/-mitarbeiter sind nicht optimal auf die Reisegruppen und die Situation vorbereitet worden
- Situationen/Begegnungen vor Ort sind nicht vorbereitet, bleiben dem Zufall überlassen, Lern-/Begegnungschancen bleiben ungenutzt
- keine optimalen äußeren Rahmenbedingungen (zu wenige Zeit um wirkliche Begegnung stattfinden zu lassen etc.)
- Besuche (vor allem häufige) von Gästegruppen können die eigentliche Projektarbeit stören
- fehlende Lockerheit in der Situation
- große Gruppengrößen
- häufige Wiederholungen des Projektbesuchs – Kommerzialisierung bzw. immer die gleichen Projektmitarbeiter kommen „zum Zuge“
- kein wirklicher Kontakt kommt zustande, Einheimische werden „besichtigt“
- falsche Erwartungshaltungen auf beiden Seiten
- Umgang mit Geschenken, Trinkgeldern etc. nicht vorher besprochen
- kein respektvolles gegenseitiges Verhalten.

## **2. Konzeptionelle und didaktische Grundlegung des Besucherprogramms in den EZ- Projekten**

#### **Anforderungen an einen gelungenen Projektbesuch sind somit:**

- ein wirkliches Interesse, Aufgeschlossenheit und Offenheit bei allen Beteiligten (Gastgeber, Gästegruppe, Reiseveranstalter)
- durchdachte Projektauswahl
- Schulung/ gute Vorbereitung der Reiseleiter und der „lokal Guides“ auf den Projektbesuch (persönliche Orts- und Projektkenntnis erscheint als besonders wichtig)
- Identifikation von Projektverantwortlichen und anderen Personen, die in Projektbesuch eingebunden werden
- präzise, klare Einführung/Einbindung der Projektverantwortlichen vor Ort und mehrerer Mitarbeiter in Zielsetzung/ Verantwortung für die Projektbesuche; Deutlichmachen der Erwartungen der Gäste
- klare Abstimmung des Besuchsverlaufs, keine Zufälligkeiten (wer macht wann, was, wo, wie?); ggf. Vermittlung einiger didaktische Grundkenntnisse
- Klärung/Organisation der Sprachfrage (Kleingruppen)

- Organisation von kleinen Erlebnissen, Begegnungen, sonstigen kleinen Events
- Klärung der Frage der Entlohnung für gewisse Dienstleistungen (Imbiss, Tee, Früchte etc.)
- gute Vorbereitung/ Einführung der Reisegruppe auf Projektbesuch (Neugierigmachen, Aktivieren, Informieren)
- Reflexion der Erlebnisse, evtl. Nachbereitung/ Fragemöglichkeiten.

**Fragen, die mittel- und längerfristig im Auge behalten werden müssen:**

- Wie viele Besuche von Reisegruppen verträgt ein Projekt, vertragen die Projektverantwortlichen und -mitarbeiter (Frequenz – Belastbarkeitsgrenzen)
- Wie laufen die Projektbesuche ab, wenn die erste Euphorie auf Seiten der Einheimischen abgeklungen ist?
- Gelingt es auf Dauer, die derzeit starke Abhängigkeit von der Anwesenheit und der Organisation durch eine verantwortliche Person vor Ort auf mehrere Personen auszudehnen?
- Was haben die Einheimischen von diesen Projektbesuchen? Ideell, finanziell, kontaktmäßig,...?

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## Going Fishing with the Fishers - Promoting Sustainable Tourism

### Mit den Fischern fischen gehen - Die Förderung von nachhaltigen Tourismusansätzen

Nicole Häusler, CIM

#### Tourism – the two sides of a coin

Holidays – the best time of the year. Many people dream of blue seas, palm trees and luxury on romantic islands. Some want only culture and book a study tour of centuries-old temples. Others who want something really exotic, visit the highland tribes of northern Thailand. But a welcome change of scene for the holidaymaker does not always translate into profit for the hosts. A polluted environment and the sell-out of cultures ("One photo - one dollar, my friend") are the frequent side-effects lamented by the host countries and, increasingly, by the tourists alike.

*"Sustainable tourism must be socially, culturally, ecologically and economically sound. It must take account of the needs of present and future generations."*

#### Sustainable tourism – promoted by CIM

By recruiting tourism specialists for organisations in Africa, Asia, Latin America, and Central and Eastern Europe, CIM is helping to promote sustainable tourism. Success has proved CIM right, and we will continue with the placement of experts in sustainable tourism planning.

CIM – the *Centrum für Internationale Migration und Entwicklung* – was set up in 1980 as a joint operation of the Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH (German Technical Cooperation) and the German Central Placement Office (ZAV) of the Federal Employment Institute (BA). CIM places experienced German and European experts in African, Asian and Latin American countries, as well as in Central and Eastern Europe. State and parastatal organisations in the partner countries, as well as private-sector employers, can inform CIM of their requirements for highly qualified experts if competent and well trained experts are not available locally. CIM looks after recruitment and tops up the local salary. This enables the partner organisations to recruit experienced technical and managerial staff on the European labour market and to put their skills to targeted use for a limited period of time.

CIM experts are fully integrated into the local partner structures; they enter into an employment contract with the local employer on local terms and conditions. The initiative and responsibility remain solely in the hands of the employer. By passing on know-how, the integrated experts provide concrete help for self-help. Before recruiting suitable experts CIM ascertains that the envisaged post makes good development-policy sense. CIM is largely financed by the Federal Ministry for Economic Cooperation and Development (BMZ), but other ministries and institutions contribute too. Worldwide, there are currently over 700 CIM experts working in more than 80 countries.

CIM finds highly qualified specialists in the following fields among others: environment protection and resource conservation, economic promotion, vocational training, health and public ad-

ministration reform. The CIM tourism experts are at work primarily in the fields of marketing, infrastructure development and management consultancy. Some of them are also helping to set up tourism industry associations. Three examples of CIM-engagements in the field of tourism:

#### **Kyrgyzstan: Eco-tourism is a top-level issue**

More and more tour operators are offering holidays in Kyrgyzstan, which only a few years ago was virtually unknown to the broader public as a holiday destination. But people are becoming aware of Kyrgyzstan and the reason is to be found not just in the attractions of a landscape criss-crossed by high mountain ranges or the many different species of rare animals, like the snow leopard. It is also to be found in the efforts of the CIM expert attached to the tour operators association in Bishkek. The aim of his assignment was to help Kyrgyzstan gain access to international tourist markets and so ensure the economic survival of local tour operators. He had achieved that aim within the space of a few years.

In recognition of his achievements, the CIM expert was appointed 'personal adviser on tourism' to the President of Kyrgyzstan. This position in turn has made it possible for him to get a dialogue going between the public sector and the tour operators; and in this way many of the bureaucratic hurdles have been eliminated.

The Kyrgyz Tourism Network (TourNet) was set up at the initiative of the CIM adviser. It acts as a forum for consultation and exchange for various foreign organisations and companies operating in the tourism industry. The focus is on promoting environmentally aware management and putting across eco-tourism concepts.

#### **Côte d'Ivoire: Solar showers in the rain forests**

The Taï – a national park in the west of Côte d'Ivoire is the largest wetland forest complex in West Africa. UNESCO declared it a Biosphere Reserve in 1979 and a Natural World Heritage site in 1982. Lowland rain forest originally covered almost one half of the country's land area; today it accounts for barely eight per cent. The Ivorian government also wants to see eco-tourism become a source of income as a way of putting a halt to deforestation.

The park authorities have taken on two CIM experts, a biologist and a tourism expert, to help in the development of eco-tourism plans. The experts are working on a tailor-made tourism programme and training of local staff; the biologist is teaching the park-keepers state-of-the-art techniques for counting animals - so that the park's ecological balance can be monitored.

In addition, a small eco-camp was set up in 1997 where tourists can spend the night. It is built in the local style, but has solar energy, waste separation and waste water purification so that it does not pollute the environment. The park authorities are planning to privatise the eco-camp. The CIM expert is assisting with privatisation and taking care of marketing.

#### **Thailand: recuperating in a paddy field**

Thailand has a great deal more to offer than the three 'S's' (sun, sand and sex) which, according to the cliché, is what many of the nine million or so tourists annually are looking for. But even if you include temples and diving, you've still not exhausted the country's tourist attractions.

The Thai tour operator REST (Responsible Ecological Social Tours) in conjunction with five villages has set up a community-based tourism project to give tourists an insight into daily life in Thailand. To begin with, REST holds training courses to prepare the villagers for dealing with the visitors. For their part, the visitors join in the daily lives of the local people. They stay in the



houses of guest families, eat with them and, in the morning, go along with them to the rice fields or out fishing.

In order that the visitors do not become a burden to the environment or the community, REST consults the villagers at regular intervals and limits the annual number of visitor days. About ten per cent of the income from tourism flows into community development projects. Thanks to the deployment of a CIM expert, REST was prepared for its cooperation with the international tour operators and tourists and trained in marketing. For REST, not only is the future of its programme assured but also support for these five villages, for which tourism is to remain a secondary source of income.

***Among the fishers of southern Thailand***

*An hour's boat ride from the island of Phuket tourists can stay with a Muslim fishing family for up to three days. For one whole day they go sea fishing. The next day they visit a plantation where rubber is painstakingly produced. The fishers talk openly about over-fishing and the felling of mangrove forests, the price of octopus and life for Muslims in a Buddhist society. At supper, as they sit under the palm trees carefully picking meat from the crabs they have caught themselves, the guests are invited to sing sea shanties. "We lay off Madagascar with the plague on board" gets a round of applause; then the guests set about their second crab.*

**CIM – Tourism strategies for the future**

The most promising tourism approaches are those which combine ecological, economic and social elements, including resource conservation, introduction of eco-labels, promotion of small-scale businesses and local participation in planning.

The CIM expert often has to play the role of competent mediator between the interests of environmental protection, local interests and tourist companies. In order that socially and environmentally sustainable tourism is not just planned but also implemented, CIM experts train travel guides. The know-how they pass on to their local colleagues is helping to make tourism a force for conservation.

Success has proved CIM right, and we will continue with the placement of experts in sustainable tourism planning.

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**Mit den Fischern fischen gehen -  
Die Förderung von nachhaltigen Tourismusansätzen**

**Tourismus – die zwei Seiten einer Medaille**

Ferien – die schönsten Tage des Jahres. Viele träumen von blauem Meer, Palmen und Luxus auf einer romantischen Insel. Andere wollen Kultur pur und buchen eine Studienreise, um jahrhundertalte Tempel zu besichtigen. Manch einer will die Bergvölker im Norden Thailands besuchen, um wirklich Exotisches zu erleben. Was für die Urlauber Abwechslung bietet, bringt den Gastgebern nicht nur Gewinn. Umweltverschmutzung und der Ausverkauf der Kulturen („One Photo – one Dollar, my friend“) sind häufige Begleiterscheinungen, die von den Gastländern und zunehmend von den Reisenden selbst beklagt werden.

*„Nachhaltiger Tourismus muss sozial, kulturell, ökologisch und wirtschaftlich verträglich sein. Er muss Rücksicht nehmen auf die Belange heutiger wie auch der kommenden Generationen.“*

### **Nachhaltige Tourismusansätze – von CIM gefördert**

Durch die Vermittlung von Tourismus-Fachkräften an Organisationen in Afrika, Asien, Lateinamerika sowie Mittel- und Osteuropa leistet CIM einen wichtigen Beitrag zur Förderung von nachhaltigen Tourismusansätzen.

Das Centrum für Internationale Migration und Entwicklung (CIM) wurde 1980 als Arbeitsgemeinschaft der Deutschen Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH und der Zentralstelle für Arbeitsvermittlung (ZAV) der Bundesanstalt für Arbeit (BA) gegründet. CIM entsendet erfahrene deutsche und europäische Fachkräfte in die Länder Afrikas, Asiens, Lateinamerikas und Mittel- und Osteuropas. Staatliche und halbstaatliche Institutionen in den Partnerländern sowie Arbeitgeber aus der Privatwirtschaft können bei CIM ihren Bedarf an hochqualifizierten Mitarbeitern anmelden, wenn vor Ort kompetente und gut ausgebildete Fachleute fehlen. CIM übernimmt die Vermittlung und zahlt einen Zuschuss zum lokalen Gehalt. So wird es den Partnerorganisationen möglich, erfahrene Fach- und Führungskräfte auf dem europäischen Arbeitsmarkt zu gewinnen und ihr Know-how für einen befristeten Zeitraum gezielt zu nutzen. Die Fachkräfte sind in die lokalen Partnerstrukturen voll integriert – Initiative und Verantwortung bleiben alleine in den Händen der Arbeitgeber. Weltweit sind zur Zeit über 700 CIM-Fachkräfte in mehr als 80 Ländern tätig. Finanziert wird CIM zum größten Teil vom Bundesministerium für wirtschaftliche Zusammenarbeit (BMZ), aber auch von anderen Ministerien und Institutionen.

CIM vermittelt vor allem Fachkräfte in die Bereiche Umwelt- und Ressourcenschutz, Wirtschaftsförderung, berufliche Bildung, Gesundheit sowie Reform der Öffentlichen Verwaltung. In der nachhaltigen Tourismusentwicklung sind die CIM-Experten vor allem in den Bereichen Marketing, Infrastrukturentwicklung und Managementberatung tätig; einige helfen auch beim Aufbau von Touristikverbänden. Drei Beispiele zum CIM-Engagement im Bereich des Tourismus:

#### **Kirgistan: Ökotourismus als Chefsache**

Immer häufiger bieten Reiseveranstalter Touren nach Kirgistan an – einem Reiseziel, das der breiten Öffentlichkeit vor wenigen Jahren noch völlig unbekannt war. Dass es nun ins Bewusstsein rückt, liegt nicht nur an der landschaftlichen Schönheit, die von hohen Gebirgsketten durchzogen ist, oder an den vielen seltenen Tierarten wie beispielsweise dem Schneeleoparden. Es ist sicher auch den Bemühungen des CIM-Experten zu danken, der im Verband der Reiseveranstalter in Bischkek arbeitet. Das Ziel seines Einsatzes, nämlich Kirgistan Zugang zu den internationalen Touristikmärkten zu verschaffen und so lokalen Reiseveranstaltern das wirtschaftliche Überleben zu sichern, hat er bereits nach wenigen Jahren erreicht.

In Anerkennung seiner Leistungen wurde die CIM-Fachkraft zum „persönlichen Tourismusberater des Präsidenten von Kirgistan“ ernannt. Diese Position wiederum hat ihm ermöglicht, den öffentlichen Sektor mit den Reiseveranstaltern ins Gespräch zu bringen; viele bürokratische Hemmnisse konnten so aus dem Weg geräumt werden.

Auf Initiative des CIM-Beraters wurde auch das Kyrgyz Tourism Network (TourNet) ins Leben gerufen. Es dient zur Absprache und zum Austausch verschiedener ausländischer Organisationen und Unternehmen im Tourismussektor. Schwerpunktmäßig geht es hier um die Förderung umwelt-bewussten Managements und die Vermittlung von Ökotourismuskonzepten. Der Verband der Reiseveranstalter konzentriert sich weiterhin vor allem auf das Außenmarketing und die Zusammenarbeit mit der Regierung.

### **Côte d'Ivoire: Solarduschen im Regenwald**

Der Taï –Nationalpark im Westen der Elfenbeinküste ist der größte zusammenhängende Feuchtwaldkomplex Westafrikas. Er wurde 1979 von der UNESCO zum Biosphärenreservat und 1982 zum Weltnaturerbe erklärt. Tieflandregenwald bedeckte ursprünglich fast die Hälfte der Landesfläche, heute beträgt der Waldanteil nur noch knapp acht Prozent. Um der weiter voranschreitenden Entwaldung entgegenzuwirken, hat die Regierung einen Forst- und Naturschutzplan entwickelt. Nach den Plänen der ivoirischen Regierung soll der Ökotourismus als eine Einnahmequelle dienen, um die Entwaldung zu stoppen.

Die Parkverwaltung hat zwei CIM-Fachkräfte eingestellt, einen Biologen und eine Touristikexpertin, die bei der Entwicklung von Ökotourismuskonzepten helfen sollen. Sie feilen an einem maßgeschneiderten Tourismusprogramm und schulen die lokalen Angestellten; der Biologe lehrt die Parkwächter modernste Techniken der Tierzählung – so kann das ökologische Gleichgewicht des Parks überwacht werden und die vom Projekt durchgeführten Maßnahmen zur Wildererbekämpfung überprüft werden.

Seit 1997 gibt es überdies ein kleines Ökocamp, in dem Touristen übernachten können. Allerdings genügt die Ausstattung und Verwaltung des Camps nicht den internationalen Ansprüchen von Touristikunternehmen. Seit dem Bau eines Hotels (20 Betten) im Jahre 2000 wird der Taï – Nationalpark nun auch von deutschen Reisegruppen besucht. Es ist im lokalen Stil gebaut, verfügt aber über solare Energieerzeugung, Mülltrennung und Abwasserreinigung und schont so die Umwelt. Der Kauf lokal produzierter Nahrungsmittel und die Anstellung von acht einheimischen Touristenführern fördert die Kooperation mit den Anwohnern. Die Parkverwaltung plant, das Ökocamp zu privatisieren. Die CIM-Expertin unterstützt sie dabei und kümmert sich um das Marketing.

### **Thailand: Erholung im Reisfeld**

Thailand bietet weit mehr als die drei „S“ (Sonne-Strand-Sex), die laut Klischee viele von etwa neun Millionen Touristen pro Jahr hier suchen. Aber auch mit Tempeln und Tauchen ist das Tourismusangebot noch nicht erschöpft.

Der thailändische Reiseveranstalter REST (Responsible Ecological Social Tours) hat gemeinsam mit fünf Dörfern ein „Tourismusprojekt auf Gemeindebasis“ aufgebaut, das Reisenden Einblicke in den thailändischen Alltag verschafft. Mit diesem Konzept wird die Bevölkerung nicht nur in die inhaltliche Planung der lokalen Tourismusentwicklung involviert, sondern sie profitiert auch direkt vom Tourismus.

REST bereitet die Dorfbewohner zunächst in Trainingsmaßnahmen auf den Umgang mit den Besuchern vor. Die wiederum nehmen bei ihrem Aufenthalt am täglichen Leben der Einheimischen teil. Sie übernachten in den Häusern der Gastfamilien, essen mit ihnen gemeinsam und begleiten sie morgens auf das Reisfeld oder zum Fischfang. Damit die Gäste weder für die Umwelt noch für die Gemeinschaft zur Last werden, befragt REST die Dorfbewohner regelmäßig und begrenzt die Zahl der jährlichen Besuchstage. Etwa zehn Prozent der Tourismus-Einkünfte fließen in dörfliche Entwicklungsprojekte.

Durch den Einsatz einer CIM-Fachkraft wurde REST vor allem auf die Zusammenarbeit mit internationalen Reiseveranstaltern und Touristen vorbereitet und im Marketing geschult. Es wurden u.a. Pressereisen für europäische Journalisten organisiert und die Zusammenarbeit zu Reiseveranstaltern aus Europa, USA und Australien aufgebaut. Für REST ist damit nicht nur die Zukunft seines Programms gesichert, sondern vor allem die Unterstützung dieser fünf Dörfer, für die Tourismus nur eine Nebeneinnahme bleiben soll.

**Bei den Fischern in Südthailand**

*Eine Bootsstunde von der Insel Phuket entfernt können Touristen bei einer muslimischen Fischerfamilie bis zu drei Tage zu Gast sein. Einen Tag lang fahren sie zum Fischen mit auf das Meer hinaus. Tags darauf geht es zu einer Kautschukplantage, wo mühevoll Gummi hergestellt wird. Die Fischer berichten offen von Überfischung und abgeholzten Mangrovenwäldern, über den Preis von Tintenfischen und den Alltag der Muslime in einer buddhistischen Gesellschaft. Während die Gäste beim Abendessen unter Palmen dann bemüht sind, das Fleisch aus dem selbsterbeuteten Krebs zu pulen, werden sie gebeten, ein Seemannslied zu singen. "Wir lagen vor Madagaskar und hatten die Pest an Bord" wird mit Applaus bedacht, und die Besucher wagen sich an ihren zweiten Krebs.*

**CIM – Tourismusstrategien für die Zukunft**

Aufgrund der Erfahrungen in der Vergangenheit hat sich gezeigt, dass nur solche Tourismuskonzepte langfristige Erfolge verzeichnen, die die Bereiche Ökologie, Ökonomie und Soziales miteinander verbinden. Hierzu zählen Ressourcenschutz, die Einführung von Umweltsiegeln, die Förderung kleinerer Betriebe sowie die Beteiligung der lokalen Bevölkerung an der Planung.

Dabei übernimmt die CIM-Fachkraft häufig die Rolle des kompetenten Mittlers zwischen Naturschutz, einheimischen Interessen und touristischen Unternehmen. Um sozial- und umweltverträgliche Reisen nicht nur am Schreibtisch zu planen, sondern auch umzusetzen, schulen CIM-Fachkräften auch Reiseleiter. Das theoretische und praktische Wissen, das sie direkt an einheimische Kollegen weitergeben, hilft, den Tourismus schonend zu gestalten.

CIM hat eine Broschüre auf Englisch und Deutsch herausgegeben, in der neben den drei genannten zwei weitere nachhaltige Tourismusansätze aus Kolumbien und Kroatien vorgestellt werden (Titel: „Mit den Fischern fischen gehen“). Aufgrund der bisher erzielten Erfolge wird CIM auch in Zukunft Fachkräfte für die nachhaltige Tourismusplanung vermitteln.

**Reference /Referenz**

CIM (2001): Mit den Fischern fischen gehen. Eine Broschüre des Centrums für internationale Migration und Entwicklung (CIM), Frankfurt a.M.

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## **Consolidated Marketing: Central America is Creating a New Image**

### **Vermarktung unter einem gemeinsamen Dach: Zentralamerika schafft sich ein neues Image**

**Karola Tippmann, GTZ – FODESTUR, Nicaragua**

For Central America, the year 2002 starts with a new common tourism trademark, in the framework of the region's integration process. This presentation provides some background information on this process as well as the main steps of a tourism-related technical co-operation project and shows some of the difficulties on the road to integration.

#### **The project FODESTUR**

FODESTUR can roughly be translated by *Promotion of Sustainable Development through Tourism in Central America*. (Project office: Managua, Nicaragua). It is supported by the GTZ (German Agency for Technical Co-operation) and financed by the BMZ (Federal Ministry for Economic Co-operation and Development).

The project works on a supra-regional basis and coordinates the tourism activities of the seven Central American countries: Costa Rica, Belize, El Salvador, Honduras, Guatemala, Nicaragua and Panama. Our local partner organization is the System of Integration of Central America (SICA).

SICA, through its executive organs, aims at the development of a democratic, free and economically prosperous Central American region. The first step in this process was the creation of a custom's union and a treaty on immigration-regulation among – initially- four member countries. Supervising commissions for the promotion of economic cooperation and the support of integration processes in the fields of cultural, social and environmental policies have been founded. Regarding the area of tourism, the responsible organ at SICA is the council of tourism ministers. During a presidential summit five years ago, the Central American presidents requested support for this tourism project. The Government of the Federal Republic of Germany agreed on a joint tourism-related project in order to contribute to the region's integration process.

FODESTUR is considered an integration project: The project's goal is to unite the region's public and private tourism sector in a common development strategy.

The public sector in Central America consists of the tourism institutes which are so-called autonomous institutions that should not be confused with ministries. The presidents or directors of these autonomous institutions hold political posts and belong to the governing party. They have to leave their post when the government changes. These tourism ministers (not a correct expression that nonetheless is being commonly used) have the difficult task of working with the private sector which can lead to complicated constellations, that in certain cases have led to three minister replacements in one legislative period (this was the case for Costa Rica in 1999 and is currently succeeding in Guatemala).

For the FODESTUR project, the council of ministers is the politically decisive organ. Subordinated to this organ, there is COMECATUR, the council of Marketing Directors of each tourism institute, as well as the council of Planning Directors who recently have organized themselves through the committee for sustainability COMSOS, together with the directors of the departments for environment and sustainable development.

The private sector is organized through tourism chambers that, by separating from the commerce and industry associations, have been able to create their own lobby. In most countries, however, the chambers are understaffed and under financed and tend to be weak. Only in Costa Rica and in Guatemala there are sufficiently strong chambers that have a strong political influence, due to the fact that in these two countries tourism has developed into one of main pillars of the economy. Additionally, the tourism chambers have organized themselves into a Central American federation called FEDECATUR whose presidents regularly meet in order to exchange experiences and criteria. Moreover, the national hotel chambers and tour operator associations have also organized themselves on a Central American level but tend to be relatively weak organizations on the regional level.

FODESTUR cooperates with a regional network of non-governmental organizations, the so-called Consorcio Grupo 7 that, together with tourism micro-enterprises, has coordinated marketing activities as well environmentally oriented management practices within the framework of Ruta del Maíz, the Corn Route. Another network is related to the eco-tourism initiative of the project and is currently in its founding stage.

### **The common trademark for Central America**

Despite the increasing demand in developing countries, marketing strategy, creation of a corporate identity or the development of a logo are only little regarded as topics for international co-operation projects. Astonishingly enough, the agreed-upon project goal spells:

*The Central American Tourism Institutes, in coordination with the regional and international tourism industry, have created a common image of the region as a destination for sustainable tourism and have started with the marketing of that common image.*

Because of its past as a region of civil wars and because of media coverage about natural disasters and cases of kidnappings and corruption, Central America finds it difficult to escape certain stereotypes among European consumers and consumers from other parts of the world. These stereotypes tend to last even if they have lost their legitimacy. The hope is that through a joint marketing effort the faith of international markets in the region as an attractive tourism destination can be restored.

### **1<sup>st</sup> step: Creating awareness and sensitivity**

Image and self-awareness play a central role in tourism. In no other industry the behaviour and preferences of suppliers or consumers are guided so much by prejudice and abstract images of places and people than in tourism. There is no such thing as neutral point of view. Everyone has its own pattern of perception and interpretation that is influenced by a variety of factors.

In June 2000, a workshop with the participation of high-ranking tourism leaders took place in Guatemala. Tourism ministers, presidents of tourism chambers and representatives of the Central American Parliament, as well as representatives of the regional environmental authority CCAD participated in this workshop, dedicated to the crucial issue of linking identity and image, in other words self-perception and external presentation or external image.

It is one of the goals of this project to create an awareness among decision makers about the relationship between reality and perceived reality and to foster a realistic relationship between vision and reality. Based on this awareness, all participating decision makers agreed upon the following elements:

- **Tropical nature**, manifest through the flora, the fauna, the biodiversity, the volcanoes and the multi-coloured beaches.
- **Diverse culture**, present in archaeology, pre-colonial and colonial history, different ethnic groups, gastronomy and the arts in the form of music, dance and crafts.

The participants also considered part of their cultural identity the fact that historically they had the courage to rise against authority, to resist and sometimes even to risk their life in the process.

Another point where self-image and the projected image coincide, refers to the 14 sites that have been declared by the UNESCO as world heritage sites. Central America has a total of 14 of these sites that can be classified in either natural history sites or cultural sites. To mention some of them: The coral reef of Belize, the city of Antigua, Guatemala and the Maya ruins of Tikal, the Copan ruins in Honduras, the Darien National Park in Panama and the historic city centre of Panama City, the National Park Coco Island in Costa Rica and the old pre-Columbian City of León in Nicaragua.

After initial impulses had been given during the workshop, a mixed commission was formed in order to define through what kind of studies the presumptions and statements elaborated during the workshop could be verified.

## **2<sup>nd</sup> Step: Basing conclusions on analysis and market investigation**

### **Market study in Europe**

A market investigation directed towards travel wholesalers and travel agencies in nine European countries was subcontracted, on the one hand to obtain an overview of the market potential for travel from Europe to Central America and on the other hand to obtain a clear picture of what exactly the image among wholesalers and travel agents regarding Central America consists of. The study should be understood as an association study.

To resume the outcome of that study, we can say that the image of Central America among wholesalers and travel agents is dominated by positive associations, such as historic/cultural, adventurous, natural, interesting and exotic. In comparison with other destinations with a similar profile, specifically Mexico and the Caribbean, the friendliness of the local population and the enormous variety of nature and landscapes were positively emphasized. On the other hand, the investigation demonstrated that there are also a number of negative associations linked with Central America, such as poor, dangerous, underdeveloped, not luxurious and politically unstable. Compared with other destinations, the safety of tourists and the lack of stability of political systems was viewed critically.

Countries that were associated with Central America were primarily Mexico, Costa Rica and Guatemala (although we do not consider Mexico to be a part of Central America) while few people mentioned countries like Nicaragua and El Salvador. Guatemala was mostly associated with culture, while countries like Costa Rica, Panama, Honduras, El Salvador and Belize tend to be mostly associated with nature. An exception is the case of Nicaragua, the only Central American country that is neither being associated with culture nor nature and that seems to be almost completely seen in terms of underdevelopment. This doesn't come as a surprise considering that Nicaragua is among the poorest nations in the world. But it is equally surprising that Honduras, a country facing similar problems, does not provoke likewise associations.

### **Survey at airport about the degree of satisfaction of departing tourists**

This survey was realized in all seven Central American countries and didn't reveal any big surprises. In all countries, the tourism infrastructure was considered as underdeveloped. Concerns regarding the safety of tourists and the lack of cleanliness were also mentioned; the later not necessarily in hotels, but rather in terms of the general impression of towns and streets.

Positive feedback was given for the "charming chaos as a whole", the charisma, friendliness and human warmth of the people, as well their uncomplicated way in their interaction with visitors from foreign countries.

### **Survey among Central American Tour Operators**

This study was designed to investigate the opinion local tour operators have about the touristic situation of their region, where they see problems and where they identify need for support.

In brief: Negatively seen was the high-fare-policy of the regional airline, as well as the dependence on this airline due to its monopolistic position; also the lack of understanding of eco-tourism. Specifically tour operators criticized that eco-tourism is more often than not associated with a very vague understanding of nature. In very few cases Central American tour operators make their products more sustainable by actively involving the visited communities or by observing environmental or cultural criteria. This certainly cannot be said for all tour operators but the criticism was mentioned as a general opinion of the own industry.

### **3<sup>rd</sup> Step: Distribution of the studies' results among the Central American population**

With these market studies, involving all relevant groups, it was possible to obtain a detailed picture of the current situation of the region that clearly shows the necessities for intervention from the part of the politically responsible as well as from the tourism industry, in order to create a positive image of Central America and disseminate it.

In another step, press conferences were held in all Central American countries and the results of the studies were published, in order to sensitise the population as a whole.

### **4<sup>th</sup> Step: Selection of a PR agency in Europe**

In order to follow up on these theoretical insights, a professional Public Relation (PR) agency was selected. It should have the knowledge and experience to develop a logo of the Central American region, that not only is accepted by all the individual countries but that also reflects the results of the market studies in a more or less abstract manner. Against the opposition of local and regional authorities and interest groups the FODESTUR project decided to engage PR agency, which was not located in Central America, because of its good reputation and competence. A Spanish PR agency had won the tendering procedure.

### **5<sup>th</sup> Step: Creating consensus on a common logo**

COMECATUR, the before-mentioned committee of marketing directors has been the principal responsible in the whole process of developing the logo. In this committee the different proposals were analysed and discussed. The PR agency sent its marketing director to Central America on a number of occasions in order to explain the different steps and details involved with the development of a logo. The last three proposals were tested for market acceptance through so called pre-tests in Spain and Germany and the most favoured design was determined to be the official one, during a meeting of the Central American tourism ministers held in November 2001.



### **6<sup>th</sup> Step: Elaboration of a Marketing Plan**

Part of the activities of the Public Relations agency is the elaboration of a professional marketing plan in order to ensure the proper implementation of the trademark. Based on this marketing plan, a workshop was realized in Honduras, with participation of Marketing Directors and representatives of the tourism industry during which priorities were defined for the next three years; with the goal of securing proper financing by the Central American countries.

The plan extends itself over a period of three years, and is subdivided in 6 areas of action. Its execution requires a maximum amount of 2.7 Mio US\$. For the first year, 2002, an amount of 750,000 US\$ is required, an amount that has already been guaranteed by the Central American countries and the FODESTUR project.

One of the first steps during this year will be to inform in all Central American countries about the efforts and results in relationship with the logo development process and assure a broad acceptance in all areas. Furthermore, the private sector has to be prepared in the proper use of the logo. Following this step, a campaign in Europe will be prepared thoroughly.

By now, the common trademark is no longer an idea but has become reality in the form of a concrete plan, that includes the assignment of tasks and the allocation of financial resources. However, despite initial successes, the effort to implement a sustainable tourism policy in Central America is still in its beginnings.

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### **Vermarktung unter einem gemeinsamen Dach: Zentralamerika schafft sich ein neues Image**

Für Zentralamerika beginnt das Jahr 2002, im Rahmen der Integrationsbemühungen, mit einer gemeinsamen touristischen Dachmarke. Dieser Beitrag schildert Hintergründe und den oftmals steinigen Weg dahin.

#### **Das Projekt FODESTUR**

Das Projekt FODESTUR, zu deutsch *Förderung der nachhaltigen Entwicklung durch Tourismus in Zentralamerika*, hat den Bürositz in Managua/Nicaragua. Es wird unterstützt von der GTZ (Deutsche Gesellschaft für Technische Zusammenarbeit) und finanziert vom BMZ (Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung).

Das Projekt arbeitet überregional und in ihm werden die touristischen Aktivitäten der sieben zentralamerikanischen Länder koordiniert: Costa Rica, Belize, El Salvador, Honduras, Guatemala, Nicaragua und Panama. Die Partnerorganisation ist das zentralamerikanische Integrationssystem (SICA).

Auf lange Sicht soll durch das SICA mit seinen Exekutivorganen in Zentralamerika eine demokratische, freie und wirtschaftlich prosperierende Region entstehen. Der erste Schritt dazu war die Schaffung einer Zollunion und eine Vereinbarung zum freien Personenverkehr zwischen – zunächst - vier Mitgliedstaaten. Zur Förderung der wirtschaftlichen Kooperation, zur Unterstützung einer umweltpolitischen sowie kulturellen und sozialen Integration sind überwachende Ausschüsse gegründet worden. Für den touristischen Bereich ist der Rat der Tourismusminister zuständig.

Das Projekt wurde vor rund 5 Jahren während eines Präsidentengipfels bei der Bundesregierung Deutschlands angefordert, weil man die Hoffnung trägt, dass Tourismus sich in den nunmehr befriedeten Ländern als wirtschaftlich wichtiger Faktor schnell entwickeln wird und dass es wichtig sei, auch die touristische Dynamik als Integrationsvehikel zu nutzen. FODESTUR gilt als Integrationsprojekt.

Ziel ist es, den staatlichen und den touristischen Privatsektor der Region in einer gemeinsamen Entwicklungsstrategie zusammenzuführen.

Der staatliche Tourismussektor besteht in Zentral-Amerika aus den Tourismusinstituten, das sind sogenannte *autonome* Institutionen, die nicht mit Ministerien zu verwechseln sind. Die Präsidenten bzw. Geschäftsführer bekleiden politische Ämter, gehören der regierenden Partei an und verlassen bei einem Regierungswechsel ihr Amt.

Da Tourismusminister (der Titel ist eigentlich falsch, trotzdem benutzt ihn in Zentralamerika jedermann) die schwierige Aufgabe meistern müssen mit dem touristischen Privatsektor zusammenzuarbeiten, entstehen unter Umständen komplizierte Konstellationen, die schon dazu geführt haben, dass es bis zu drei Ministerwechsel in einem Jahr gab. (Dies traf 1999 für Costa Rica zu und findet zur Zeit in Guatemala statt)

Für das Projekt FODESTUR ist der Ministerrat das politisch entscheidende Organ. Ihm nachgeordnet sind unterschiedliche Gremien, wie der regionale Zusammenschluss der Marketingdirektoren (COMECATUR) oder der Zusammenschluss der Planungsdirektoren, die sich kürzlich zusammen mit den Leitern der Abteilungen für Umwelt und nachhaltige Entwicklung zum sogenannten Komitee für Nachhaltigkeit (COMSOS) vereinigt haben.

Der Privatsektor ist in Tourismuskammern organisiert, die sich als Abspaltung von den Wirtschafts- und Industrieverbänden in den vergangenen Jahren eine eigene Lobby geschaffen haben. In den meisten Ländern der Region sind die Kammern allerdings schwach entwickelt ohne zufriedenstellende finanzielle Ressourcen.

In Guatemala und Costa Rica existieren die einzigen mir bekannten Verbände mit starkem politischen Einfluss, vor allem weil sich hier die Tourismusindustrie bereits zu einem tragenden wirtschaftlichen Faktor entwickeln konnte. Die Kammern haben sich ebenfalls zu einer regionalen Föderation (FEDECATUR) zusammengeschlossen, deren Präsidenten sich regelmäßig treffen und austauschen. Auch die Hotelassoziation sowie der Assoziation der Touroperator existieren, wenn auch auf schwachen Beinen, als regionale Einrichtung.

FODESTUR arbeitet zusammen mit einem regionalen NRO-Netzwerk, dem sogenannten *Consorcio Grupo 7*, das zusammen mit touristischen Kleinunternehmern die Marketingaktivitäten als auch die Maßnahmen zur umweltorientierten Betriebsführung der *Ruta del Maíz*, der Maisstrasse, koordiniert. Ein weiteres Netzwerk im Bereich der ökotouristischen Initiative des Projektes befindet sich zur Zeit in Gründung.

### **Die gemeinsame Dachmarke Zentralamerika**

Aufgaben wie Marketingstrategien, Bildung einer Corporate Identity, Logotypen-Entwicklung waren bislang nicht die favorisierten Themen der Entwicklungszusammenarbeit, obwohl die Nachfrage aus den Entwicklungsländern zu diesem Themenbereich ständig steigt. Um so erstaunlicher, dass das Projektziel hierauf mindestens indirekt Bezug nimmt: Es lautet:

***Die zentralamerikanischen Tourismusinstitute haben in Abstimmung mit der regionalen und internationalen Tourismuswirtschaft ein gemeinsames Image der Region als Destination für nachhaltigen Tourismus kreiert und mit dessen Vermarktung begonnen.***

Aufgrund seiner bewegten Vergangenheit als Bürgerkriegsregion, durch Medienberichte über Naturkatastrophen sowie Entführungs- und Korruptionsfälle, tut sich Zentralamerika schwer, ne-

gativen Stereotypen bei europäischen und anderen Konsumenten von Tourismus zu entgehen. In der Regel erhalten sich diese über lange Zeit, selbst dann noch, wenn sie ihre Gültigkeit bereits verloren haben. Durch einen gemeinsamen Marktauftritt der zentralamerikanischen Länder soll, so erhofft man sich, das Vertrauen der internationalen Märkte in Zentralamerika als Reiseziel gestärkt werden.

## 1. Schritt: Bewusstseinschaffung und Sensibilisierung

Image und Selbstverständnis spielen im Tourismus eine zentrale Rolle. In kaum einer anderen Branche richtet sich das Verhalten von Anbietern und Konsumenten so sehr nach Vorurteilen und abstrahierten Vorstellungsbildern von Orten und Menschen wie im Tourismus. Eine neutrale Sichtweise ist dabei ausgeschlossen. Jeder hat seine eigenen Wahrnehmungs- und Deutungsmuster, die von einer Vielzahl von Faktoren beeinflusst werden.

Im Juni 2000 fand in Guatemala ein hochrangig besetzter Workshop statt mit den Tourismusministern, den Kammerpräsidenten und den Vertretern des Zentralamerikanischen Parlamentes sowie der regionalen Umweltbehörde CCAD.

Es ging darum, die Themen Image und Identität, also Selbstverständnis und Außendarstellung miteinander zu verbinden.

Ziel seitens des Projektes war, das Bewusstsein bei den Entscheidungsträgern für **Sein und Schein** zu entwickeln und gegebenenfalls Einfluss zu nehmen, damit Realität und Vision in einem realistischen Verhältnis zusammenwirken.

Die anwesenden Entscheidungsträger beanspruchten alle für sich folgende Themen:

- **Tropische Natur**, in Form von Flora, von Fauna, von Biodiversität, von Vulkanen, mehrfarbigen Stränden
- **Vielfältige Kultur**, in Präsenz von Archäologie, präkolonialer und kolonialer Geschichte, verschiedenen Ethnien, Gastronomie, Kunst als Musik, Tanz, Handwerk

Unter kultureller Identität wurde auch die Eigenschaft der Zentralamerikaner verstanden und positiv diskutiert, Mut aufgebracht haben, sich in den vergangenen Jahrzehnten gegen Obrigkeiten aufzulehnen, Widerstand zu leisten, und z.T. das eigene Leben dabei aufs Spiel gesetzt zu haben.

Als weiterer Punkt, wo Selbstverständnis und Außendarstellung in Einklang stehen sind die von der UNESCO ausgezeichneten Stätten des Weltkulturerbes zu nennen. Insgesamt hat Zentralamerika 14 dieser kultur- und naturhistorischen Kulturstätten, von denen hier einige genannt werden sollen: Das Korallenriff in Belize, die Stadt Antigua-Guatemala und die Mayaruinen von Tikal, die Ruinen von Copán in Honduras, der Nationalpark Darién und das Historische Zentrum der Stadt Panama, sowie die Naturschutzinsel Isla del Coco in Costa Rica und die alte vorkolumbianische Stadt León Viejo in Nicaragua.

Nachdem die ersten Impulse mit diesem Workshop gegeben waren, formierte sich eine gemischte Kommission, um zu definieren, mit welchen Studien die gemachten Annahmen und Aussagen belegt werden können.

## 2. Schritt: Mit Analysen und Studien fundierte Aussagen treffen

### ▪ **Marktstudie in Europa**

Es wurde eine Marktstudie in Auftrag gegeben mit Reiseveranstaltern und Reisebüros aus neun europäischen Ländern, um einerseits einen Überblick über das europäische Marktpotential für Reisen nach Zentralamerika zu erhalten und andererseits herauszubekommen, welches Erschei-

nungsbild über Zentralamerika bei den Reiseveranstaltern und -büros vorherrscht. Die Studie ist als Assoziationsstudie zu verstehen.

Kurz das Ergebnis: Die Marktstudie ergab, dass das Image Zentralamerika bei europäischen Reiseveranstaltern und -büros vornehmlich durch positive Attribute wie historisch/kulturell, abenteuerlich, natürlich, interessant und exotisch geprägt ist, wobei im Vergleich zu anderen Destinationen in der Region mit ähnlichem Angebot (Karibik, Mexiko) insbesondere die Freundlichkeit der einheimischen Bevölkerung sowie die Natur- und Landschaftsvielfalt hervorgehoben wurden. Auf der Gegenseite zeigten die Untersuchungen, dass negative Attribute wie arm, gefährlich, unterentwickelt, nicht luxuriös und politisch instabil ebenfalls mit Zentralamerika assoziiert werden und im Vergleich zu anderen Destinationen der Region insbesondere die Sicherheit der Touristen und die Stabilität der politischen Verhältnisse in Zentralamerika als besonders kritisch angesehen werden.

Mit Zentralamerika selbst wurden bei der Befragung zuerst die Länder Mexiko, Costa Rica und Guatemala in Verbindung gebracht (wobei Mexiko nach unserem Verständnis nicht dazugehört), die wenigsten Nennungen hingegen erhielten die Länder Nicaragua und El Salvador. Während mit Guatemala vornehmlich Kultur assoziiert wird, steht in den Ländern Costa Rica, Panama, Honduras, El Salvador und Belize die Natur im Vordergrund der Betrachtung. Eine Sonderrolle übernimmt in diesem Fall Nicaragua, dem als einziges Land Zentralamerikas weder ein Kultur- noch ein Naturaspekt beigemessen wird, sondern ausschließlich das Negativimage von Unterentwicklung anhaftet. Dies ist einerseits nicht verwunderlich, wenn man bedenkt, dass Nicaragua faktisch eines der ärmsten Länder der Welt ist. Erstaunlich ist, dass z.B. Honduras, in ähnlicher Situation, nicht dazu geordnet wird.

#### ▪ **Umfrage am Flughafen, über den Grad der Zufriedenheit bei ausreisenden Touristen.**

Diese Umfrage wurde in allen 7 Ländern durchgeführt und führte zu keinem überraschendem Ergebnis. In allen Ländern wird die unterentwickelte touristische Infrastruktur als mangelhaft genannt, ebenso die Sicherheit für Touristen in diversen Aspekten und die teilweise unzureichende Sauberkeit. Oftmals weniger in den Hotels und Restaurants als auf den Strassen als Gesamteindruck.

Positiv wird genannt: das Chaos als positive Gesamtheit, die Ausstrahlung von Herzlichkeit und Wärme der Menschen und deren Unkompliziertheit im Umgang mit Menschen aus anderen Herkunftsländern.

#### ▪ **Umfrage bei zentralamerikanischen Tour-Operatoren**

Mit dieser Befragung sollte herausgefunden werden, wie die Tour-Operatoren die touristische Situation ihrer Region einschätzen, wo ihre Probleme liegen und wo Bedarf an Unterstützung besteht.

In kurzen Worten: Negativ ist die Hochpreispolitik der regionalen Airline und die Abhängigkeit von deren Monopolstellung, negativ ist das mangelhafte Verständnis von Ökotourismus. Hier wurde bemängelt, dass oftmals nicht mehr als ein banales Naturverständnis damit verbunden wird.

In den wenigsten Fällen wird seitens der zentralamerikanischen Touroperator ein Zusammenhang zur Nachhaltigkeit hergestellt, indem beispielsweise die Kommunen verstärkt in die Produktentwicklung einbezogen werden, oder Umwelt- und Kulturaspekte Berücksichtigung finden. Diese Aussage trifft sicherlich nicht auf alle Anbieter zu, wurde aber innerhalb dieser Umfrage als Kritik am eigenen Verhalten deutlich zur Sprache gebracht

### **Der 3. Schritt: Die Studienergebnisse innerhalb der zentralamerikanischen Bevölkerung verbreiten**

Mit den Studien und Befragungen innerhalb relevanter Gruppen wurden Aussagen getroffen, die ein fundiertes Bild über den Ist-Zustand der Region geben und die deutlich machen, wo Handlungsbedarf seitens der politisch Verantwortlichen als auch der Tourismusindustrie angesagt ist, um ein positives Image aufzubauen und zu verbreiten.

In einem weiteren Schritt wurden von den Tourismusinstituten Pressekonferenzen in jedem einzelnen Land veranstaltet und die Ergebnisse veröffentlicht, um das Bewusstsein möglichst der gesamten Bevölkerung zu erreichen.

### **Der 4. Schritt: Auswahl einer PR Agentur in Europa**

Um die Ergebnisse nicht versanden zu lassen, wurde in einem folgenden Schritt eine professionelle Agentur gefunden, die in der Lage ist, einen Logotyp zu entwickeln, der von allen Ländern akzeptiert wird, und der die Erkenntnisse in der einen oder anderen abstrakten Form widerspiegelt. FODESTUR wurde mehrfach kritisiert, warum wir diese Agentur nicht innerhalb Zentralamerikas gesucht haben. Letztlich wurde aber nach einer entsprechenden Ausschreibung entschieden. Die Wahl fiel auf eine Agentur aus Spanien, die bereits mit einigen Ländern in einem bilateralen Arbeitsverhältnis steht und die Erfahrung in der Zusammenarbeit mit Lateinamerika hat.

### **Der 5. Schritt: Konsensfindung eines gemeinsamen Logotyps**

Für den Prozess der Logotypentwicklung zeichnet sich COMECATUR, das Komitee der Marketingdirektoren, maßgeblich verantwortlich. Hier wurden die Vorlagen der Agentur überarbeitet und diskutiert. Die Agentur schickte mehrmals ihren Marketingdirektor und andere Experten nach Zentralamerika, um die einzelnen Schritte und Details, die hinter einem Logotyp stehen, zu erklären. Die letzten drei Vorschläge wurden in einem sogenannten *Pretest* in Spanien und Deutschland auf ihre Marktauglichkeit hin untersucht und das Design mit dem größten Zuspruch wurde in der Ministerrunde im November 2001 als verbindliches Logotyp für Zentralamerika verabschiedet.

### **Der 6. Schritt: Erstellung eines Marketingplanes**

Zu den Aufgaben der PR-Agentur gehört unter anderem die Erstellung eines professionellen Marketingplanes, um die Implementierung des Markenzeichens sicherzustellen. Auf Grundlage dieses Planes wurde in Honduras ein dreitägiger Workshop mit den Marketingdirektoren und Vertretern der Tourismusindustrie veranstaltet, um Prioritäten für die kommenden drei Jahre festzulegen und um die finanzielle Absicherung durch die Länder Zentralamerikas zu gewährleisten.

Der Plan beläuft sich auf drei Jahre, ist in 6 Aktionsfeldern aufgeteilt und erfordert eine maximale Summe von 2,7 Mio. US\$. Für das erste Jahr, also 2002, wird eine Summe von 750.000 US\$ benötigt, die durch die Länder sowie durch das Projekt FODESTUR gesichert ist.

Als einer der ersten Schritte in diesem Jahr wird es darum gehen, die Bemühungen und Fortschritte in allen Ländern der Region in allen gesellschaftlichen Bereichen bekannt zu machen, um eine breite Akzeptanz zu erreichen. Des Weiteren muss der private Sektor in der Nutzung des Logotyps geschult werden. Danach wird sorgfältig eine Kampagne in Europa vorbereitet.

Die gemeinsame Marke Zentralamerika ist nun keine Absichtserklärung mehr, sondern ist eine Realität geworden, die in Form eines konkreten Planes, mit verbindlicher Aufgabenverteilung und finanziellen Ressourcen besteht. Darauf sind die Zentralamerikaner stolz. Trotz erster Erfolge steht in Zentralamerika die Arbeit in Richtung einer nachhaltigen Tourismusentwicklung erst am Anfang.

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## **New Destinations: Distant Locations, Great Hopes, New Markets**

## **Neue Destinationen: Ferne Ziele, große Hoffnung, frischer Markt**

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### **Introduction by Fritz Lienemann, Berlin Consult**

The question may arise to what extent the three main terms of the topic- distant locations, hopes and new markets- are linked. The moderator thinks that they have to be seen in the general context of the FORUM INTERNATIONAL, for example the special position of ecotourism within the gigantic tourism market in general, or more precisely: the marketing of ecotourism compared to general tourism marketing.

**Distant locations:** Ecotourism addresses a special type of clients, which is usually sufficiently open-minded and interested to discover regions beyond the well-trodden paths of tourism. They want to see new places and to make contacts with local people. Therefore, ecotourism opens up regions and places for tourists, which would not have a chance to compete within the well-known targets of mass tourism.

However, “**distant locations**” must not only be at a great geographical distance from the ecotourists’ home. The word can also be seen in a figurative sense, for example that ecotourists wish to become familiar with unknown ways of life and to want spend vacations in a “distant” way from their day-to-day life, even at a short geographical distance from home.

**Great hopes:** These distant locations are often regions without any important non-touristic economic activities and thus without other important sources of income for the people living there. They therefore often have great hopes in ecotourism as a possible new and additional income source, creating new jobs and contributing to improve their living assuming that parts of the generated income are channelled to the local communities.

**New markets:** as already mentioned, ecotourism is addressing a special and sometimes new clientele. The great hopes set into the income generating effects of ecotourism and tourism-linked enterprises can only become reality once this target group is reached and made paying “customers”. To develop new markets requires also to apply new forms of marketing compliant with the expectations of the clientele.

**In summary,** ecotourism can give distant locations, so far barely tapped by tourism, the opportunity to participate in the international tourism business and can thus fulfil hopes of the inhabitants to improve their living. However, it can only work when the ecotourism locations are made economic markets and are brought to potential clients with appropriate means of marketing.

The presentations can be highlighted as follows:

Mr. Jorge Pérez presented “Ecotourism in the Páramos (Highlands) of **Ecuador**”, with some rustic lodges made from local materials and plenty of discovery opportunities. Mr. Adrian Hop-

penstedt explained a “Tourism Investment Handbook for the Issyk-Kul Region in **Kyrgyzstan**” made to initiate ecotourism investments in the nature-protected area and to promote particularly local / regional tourism. Mrs. Inga Živkušić illustrated with attractive pictures the cross-border tourism project (GTZ) between **Croatia and Montenegro**, a region with long tourism tradition and infrastructure, however, mentioned also the enormous tensions between the two formerly conflicting countries which are mitigating only slowly. Dr. Alexander Drosdov presented an overview over “The concept of ecotourism development in **Russia**”, showing the enormous variety of Russian landscapes and regions, but also the negative impacts of economic infrastructure on nature. Mr. Robert Tchabda used the example of **Cameroon** to introduce in “The role and position of a tourism representation in ecotourism development”, pointing to the great Cameroonian ecotourism potential of nature and cultures.

All speakers focussed the great hopes connected with the ecotourism potential of their regions. There is an acknowledged awareness of the potentially conflicting interests between tourism development and the protection of nature. However, specific marketing emphasising the ecotouristic value of their “products” is at present only partly developed.

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## Ecotourism in the Highlands of Ecuador

### El ecoturismo en los Páramos del Ecuador

Jorge Pérez, Tierra del Volcán, Ecuador

Tierra del Volcán (Volcano Land) offers eco-tourism and adventure travel. Tierra del Volcán is situated in an area located within the Cotopaxi National Park. The name is inspired by the formidable volcano Cotopaxi and many others, especially Rumiñahui, Quilindaña and Pasochoa.

A broad range of activities are available, from dining in the traditional mud-walled and straw-roofed farmhouse of the area, walking around the premises enjoying the magnificent vistas (cinereary), while being immersed in an awe-inspiring landscape. At the farmhouses you will get the chance to participate in the daily life of the Haciendas, feeding the Normandy calves, dressing up as a Chagra (national cow-boy) and riding horses at 4500m above sea level, or resting in front of an inviting fireplace. We take care and we make sure that you spend the next several days enjoying yourself, and the different tours.

#### Hacienda el Porvenir

The Hacienda is just one and a half hours away from Quito and at the foothills of Rumiñahui volcano. That in turn, is merely twenty minutes from the town of Machachi and five minutes from the northern entrance of Cotopaxi National Park.

Tierra del Volcán lodges its guests in a comfortable, functional and beautiful traditional house built with native materials and in keeping with the colorful construction systems typical of the area that have been used since immemorial times. An inviting living room and a dining room with their lit fireplaces warmly welcome the guests.

The “*casa de hacienda*”, or farmhouse, provides comfortable shelter and protection, built through a suitable use of materials such as brick, straw, eucalyptus wood and adobe. More than merely formal, the bedrooms recall the huts of the Andean highlands with their straw roofs and “*estera*” walls. The dining room overlooks a large courtyard surrounded by buildings and barn-houses used for farming purposes. An impressive backdrop is the ever-changing Sincholagua volcano and the magnificent cone-shaped Cotopaxi that can be admired from the window of the upstairs lounge and game room, housing a warm and inviting fireplace to observe the natural wonder. The other living room in the bedroom area - provides a pleasant atmosphere for reading, talking and resting after a busy day filled with exciting activities.

#### Hacienda El Tambo

“*Hacienda*” El Tambo dates back to a pre-columbian Inca refuge and stockyard on the road leading towards the jungle. This marvelous farm is located in a magical place surrounded by volcanoes, a region which is filled with legends: Yanahurco, or black hill, legendary Predecessor and majestic Antisana.

In a hut built with straw and stone originating from Cotopaxi’s eruptions and carved by ancestral hands, our visitors can eat and sleep in front of a fireplace with the assurance that a kitchen and a

hot bath are available, and what is most important, that they can turn their eyes at all directions and contemplate the solitude and beauty of a valley bathed with rivers in the midst of silence and the cold breeze of the “*páramo*”.

### **Hacienda Santa Rita**

Because of the “*hacienda*’s” privileged location, on the slopes of the Pasochoa volcano, you can take hikes in forests up to 3,300 meters above sea level covered with native birch and other species, and then descend to the banks of the Pita river that flows through lava formations deposited by ancient eruptions amidst waterfalls and ravines. A broad range of activities are available in this beautiful spot of the Andes, bird watching, hiking in an awe-inspiring landscape, and reaching magnificent vistas at the summit of Pasochoa volcano.

### **Parque Nacional Cotopaxi**

The Cotopaxi National Park is unique for its scenery, beauty and its ecological and cultural importance. It is the most popular and frequently visited national park in mainland Ecuador. The centerpiece is the beautiful, snowcapped Cotopaxi volcano, the highest active volcano in the world.

### **Our adventures**

It is our desire to provide innovating and different services and, thus, Tierra del Volcán adapts itself to the wishes of its clients. Therefore, our visitors are given the option to decide which activities they would like to carry out as well as the length of their stay. We have prepared a functional, friendly and easy system that permits our guests to choose among several options and to prepare their own packages. In this manner, they will have the freedom to make the best use of their stay, and enjoy as much as their time permits.

**Horseback riding.** Our specialty is horseback rides. Though not a native of America, the horse has become inseparable companion of the Andean people over the centuries. It is now a vital part of the scenery and has adapted to the climate and altitude. The best way to get to know the Andes is on horseback. Enjoy one of the most beautiful places on earth where you can take horse back rides of several hours or expeditions of up to 8 days. Guided by a “*chagra*,” or Andean cowboy, you journey through unimaginable spots that can only be reached by horse. We provide ponchos and “*zamarros*” for all horseback rides.

**Trekking & Hiking.** Walk among the remains of eruptions, along native forests and over open “*páramos*” where legends surround you as the majestic mountains watch over you. As you cross the bushes, the enveloping fog turns this magic scenery into a place where the energy can be felt.

**Mountain Climbing.** Tierra del Volcán provides excellent climbing opportunities for all levels of experience. Beginner and intermediate level climbers will enjoy the beautiful peaks and moderate slopes of the Rumiñahui and the Pasochoa volcanoes. Those looking for more adventure may choose the challenging climb of the Cotopaxi volcano, which takes you up to 5,910 meters in the sky (19,637 ft.). This is a spectacular climb filled with breathtaking views and a summit that is hard to beat.

**Mountain biking.** Offering single-track footpaths used by the Inca Empire and winding mountain dual tracks, Tierra del Volcán is the paradise for mountain bikers. Riding a mountain bike down the side of the world's highest active volcano, from the snowline at 4,500 meters (14,760 ft.) in altitude to the Los Chillos valley at 2,600 meters (14,760 ft.), quite literally takes your breath away.

**Bird Watching.** With over 1,600 species of birds, Ecuador offers more bird diversity in less space than any other country in the world, and the “*páramos*” are no exception. In Tierra del Volcán, we offer an unforgettable experience for those who love nature and bird watching. Enjoy

watching the Black Face Ibis, the Ecuadorian Hill Start, the Black Tip Doves, the Andean Lapwing, the Caraculated Caracara and — with some luck — the majestic Condor, the largest flying bird in the world.

**Rappelling.** This is an activity for those who love high adrenaline adventure. Descend through amazing ridges that will push you further and you ever push your self before. Of course, Tierra del Volcán always maintains the highest security standards.

**Visit Cotopaxi National Park.** Enjoy some of the most important and awesome natural areas in Ecuador. Discover a legendary culture and enjoy an enormous biodiversity, all while admiring the majestic Cotopaxi, the highest active volcano in the world. Discover hidden valleys, lakes and natural waterfalls, hills and archeological remains while traveling on pre-Inca paths; or reach spectacular sites at the base-camp 4,800 meters in altitude (15,744 ft.).

**Camping.** Camping is without a doubt, one of the most fun activities in this area. Finding a place that is protected from the wind, starting a bonfire, cooking and spending time with friends under the star-lit sky are part of the adventure. Waking in this Andean setting, where the sky is often painted in pastel colors, is a truly unforgettable experience.

**Cultural experience.** There is nothing more valuable when traveling than getting to know new cultures. We will take you to visit “chagras,” or Ecuadorian cowboys resulting from a blend of the native Indian culture and that of the Spanish conquistadores. Immerse yourself in the magic, rural world of the “haciendas,” or Latin American estates specializing in agriculture and cattle ranching and representing one of the main economic institutions of the region.

**El Rodeo.** Rodeo is one of the most important events that take place in the “haciendas” of the Ecuadorian Andes. It consists of a very old ceremony when the “chagras”, or Andean cowboys, take their horses and go to the mountains to round up bulls for the bullfights and to corral wild horses. The excitement begins when a trench is built in order to round up the brave animals and guide them to the corrals where they will be marked and weighed. Excitement is felt in the air. The attention of the horses is drawn to every movement in the field; the horsemen are ready to get up to the brave bulls, and the majestic Andes look down with joy at the participants of this heroic task. If you are a lover of nature, culture and legend, if you like to reach the extreme limits of emotion while riding a horse, come and share with us one of the most important events in Volcano Land: RODEO, which takes place only two times a year.

### **Fundación Páramo**

Tierra del Volcán has formed a strategic alliance with Fundación Páramo, a non-profit organization specializing in the care, preservation and development of the Andean highlands. Fundación Páramo aids us in creating community volunteer programs and it ensures that none of our adventure programs negatively affect the environment. Some of the projects that we are managing together are: reforestation, education to the local communities, sustainable process and recycling.

### **Volunteer opportunities**

A fundamental principle of the Andean worldview is reciprocity, where what is received must be returned in search of mutual growth. In keeping with this ancestral vision, we invite you to participate in the care of our planet by helping with our environmental conservation projects.

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## **Tierra del Volcán (Volcano Land): Presentación proyecto Páramo**

Tierra del Volcán o Volcano Land es una empresa de ecoturismo y turismo aventura, localizada en las zonas de amortiguamiento del Parque Nacional Cotopaxi. Para su operación ha realizado convenios con 3 haciendas estratégicamente localizadas, lo cual da a sus clientes una diversa gama de opciones dependiendo su especialidad e interés. Entre las actividades que se realizan podemos mencionar: Paseos a caballo, visita a bosque montano alto, bicicleta de montaña, senderismo, andinismo, observación de aves, agroturismo, turismo educativo y turismo vivencial.

La idea de hacer turismo en el área nace del interés de conservación y de la búsqueda de un desarrollo sustentable para la zona. Por otro lado, trabajamos con las comunidades de Loreto y de El Pedregal brindando entre otros capacitación para la protección y para un mejor manejo de los recursos.

### **Relación con las Haciendas**

Se ha establecido convenios con las haciendas desde una perspectiva ganar-ganar, donde la conservación sea un buen negocio para todos. Los convenios establecen normas para el uso de las áreas, su conservación, así como los beneficios que la hacienda recibe por el ingreso de turistas. La relación ganar - ganar da beneficios al dueño de la tierra ya que recibe una cantidad de dinero por turista que ingresa al área. Se beneficia la empresa de turismo ya que puede ampliar la oferta a sus clientes; además que se logra abarcar un área más grande para su protección y desarrollo sustentable.

En cada hacienda se ofrecen distintas actividades dependiendo de su localización geográfica y su topografía. Así por ejemplo en la Hacienda 'El Porvenir', que se encuentra en las faldas del Rumiñahui, es donde tenemos nuestra base de operaciones y nuestras instalaciones. Escogimos ésta zona estratégica por su cercanía con el Parque Nacional Cotopaxi, y a la población de Machachi. Además, por su topografía es donde se realiza la mayoría de tours a caballo, caminatas y escalada. La Hacienda 'Santa Rita', localizada en las faldas orientales del Pasochoa, tiene bosque nativo montano alto, la cuenca del río Pita con sus diversas cascadas, así como una ruta exclusiva para llegar a la cumbre.

En la Hacienda 'El Tambo' se realizan paseos de mayor duración, ya que es la hacienda de mayor extensión, así como la más alejada de la civilización. El Tambo se encuentra localizado en las faldas del Quilindaña y toma su nombre de un tambo Inca estratégico ubicado en las cercanías de la casa, y el cual fue destruido en la conquista.

### **Relación con Fundación Páramo**

En lo referente a la conservación tanto las haciendas como la operación de turismo forman parte de Fundación Páramo, la cual fue creada en asociación con los dueños de las tierras de zonas de amortiguamiento del Parque Nacional Cotopaxi, en la búsqueda de un mejor manejo y conservación del área. La fundación establece de acuerdo con su plan de manejo, el uso de las áreas, la capacidad de carga de las mismas, programas de reforestación, etc. Cuando la fundación fue creada, las haciendas se dedicaban exclusivamente a la agricultura y pastoreo, razón por la cual durante los últimos meses el plan de manejo a tomado un giro hacia el ecoturismo.

### **Relación con las comunidades aledañas**

Las haciendas como la operación de turismo son vistas con buenos ojos por las comunidades. A más de generar empleo, tanto las haciendas como Tierra del Volcán han buscado mantener la cultura y las tradiciones al continuar realizando los rodeos, una práctica ancestral donde el chagra es el protagonista. También se da a conocer al turista el valor que tiene la cultura local para el área.

Se ha gestionando con empresas de turismo en el exterior la organización de programas de voluntariado, así como equipos de computación para la escuela. Un ejemplo de ello es que a través de voluntarios se reconstruyó y pintó íntegramente la escuelita del Pedregal. De igual forma se da clases de inglés tanto a los niños como a los profesores de la escuela.

Es importante resaltar, que una de las fortalezas en la relación con las comunidades es el haber evitado caer en un modelo paternalista, generando una relación sólida de interdependencia. Un ejemplo, es la gestión que se ha realizado frente al Municipio de Machachi, en la realización de mingas para el arreglo y mantenimiento de los caminos de la zona. Gestión donde la comunidad apoya con mano de obra, la hacienda con material, el Municipio con maquinaria y la operación turística con la alimentación y combustible. Vale recalcar que Jorge Santiago Pérez, Gerente General de Tierra del Volcán pertenece a la directiva pro mejoras de las Comunidades de Loreto, Sant Ana, El Pedregal Y San Miguel. Este comité busca mejorar el nivel de vida de los moradores de la zona.

Por otro lado, existe una concientización indirecta a la comunidad a través de nuestros empleados al tratar con personas de todo el mundo y ellos transmitir su experiencia a sus amigos y familiares.

La operación también ha beneficiado a las comunidades al comprar parte de los productos agrícolas que ellos cultivan. También se contrata personal ocasional, así como caballos.

### **Relación con el Parque Nacional Cotopaxi**

Tanto la Fundación Páramo, como Tierra del Volcán han buscado ayudar al buen manejo, conservación y cuidado del Parque. Para ello Tierra del Volcán ha contratado a su costo un guarda parques el cual ayuda al cuidado del control norte del parque. De igual forma, ha capacitado tanto al personal que trabaja en las haciendas así como en la operación turística para que se patrulle el área, se respeten las normas del parque y se controle el ingreso de cazadores furtivos. Proteger las zonas de amortiguamiento del Parque hace que toda el área se vuelva un refugio de vida silvestre beneficiando al Parque Nacional Cotopaxi. Además, gracias a una adecuada capacitación a nuestros guías existe una muy buena interpretación del área, lo que concientiza a nuestros clientes de la importancia de este ecosistema.

### **Mejoras en la conservación**

Durante los dos últimos años sé a conseguido reducir el número de cazadores furtivos que entran al área. De igual forma, se han establecido programas de reforestación con bosque nativo, sembrando 60.000 árboles los cuales por una servidumbre ecológica nunca serán cortados.

Además, se ha sembrado tanto en el río Tambo como en el Tamboyacu alevines de truchas, ríos que fueron muy afectados por pescadores irresponsables que utilizaron barbasco, dinamita y otros para la pesca. Vale recalcar que en la actualidad se ha logrado eliminar en su totalidad la pesca que no sea recreacional y deportiva. Por otro lado, a través de la concientización en el área se han reducido drásticamente las quemadas del pajonal, que entre otros beneficios ayudan a la protección de recursos hídricos.

Se ha comenzado con un programa para el manejo de desechos en el área. El programa busca el que se deje de contaminar el área con basura, especialmente en quebradas. Para ello se ha asignado una cuadrilla de personal tanto de la hacienda como de la operación turística que vaya y recoja la basura de las quebradas y en su lugar ponga letreros de concientización de no arrojar basura. Hemos obtenido un excelente resultado en esta primera etapa del programa ya que no hemos vuelto a encontrar basura en dichos lugares. En las siguientes etapas se establecerán programas de capacitación para la generación de compost así como un programa de reciclado.

Otro de los proyectos prioritarios que se busca crear entre la Fundación Páramo, las haciendas, Tierra del Volcán y la comunidad, es la guardia Montada Chagra. El proyecto involucra a todos los actores que deberían estar inmersos en el cuidado del área, a través de la capacitación de los

mismos en la importancia del ecosistema de la zona. De igual forma, un grupo asignado por cada una de las partes y que tengan relación con las comunidades aledañas se lo adiestrara en el patrullaje de la zona, en búsqueda de mejorar la vigilancia en el área así como de ayuda al turista.

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## **Tourism Investment Handbook for the Issyk-Kul Region, Kyrgyz Republic**

**Adrian Hoppenstedt, Planungsgruppe Ökologie und Umwelt, Hannover**

The project “Sustainable development of tourism in the oblast Issyk-Kul” was carried out according to the Kyrgyz – German Policy-Statement of August 1999. It was financed by the German Agency for Technical Cooperation (GTZ) and elaborated by three German consultants (Planungsgruppe Ökologie + Umwelt as environmental experts, BTE and NaturErleben as tourism experts) in partnership with Kyrgyz experts. The project was closely connected to the tourism analysis for Kyrgyzstan and the Oblast Issyk-Kul by the Agha-Khan Development Network (AKDN).

### **Objectives of the study were:**

#### **(1) to support a sustainable development of tourism through**

- information about relevant conditions and contact persons for development of sustainable tourism
- publication of existing development strategies / project ideas (of tour operators, administration, etc.)
- development and publication of new strategic initiatives or – more detailed – pilot projects
- preparation of one pilot project for realisation in order to acquire financial support.

#### **(2) to create a better understanding for nature protection measures by**

- presenting nature as a substantial condition for tourism (occurrence of attractive animal species, clean water, silence, etc.)
- presenting pilot projects and guidelines in order to show that a coexistence of environmental protection and tourism is possible.

So called “*project letters*” summarise the main results of the study. They are jointly presented in a *Tourism Investment Manual*, available in a German, a Russian and an English version. The manual is addressed to potential investors and sponsors in Kyrgyzstan, the neighbour states within the CIS and countries relevant for international tourism, on the other hand also the Kyrgyz administration is addressee. The manual is structured as follows:

### **Part I: Conditions and guidelines for a sustainable development of tourism in the oblast Issyk-Kul; essential guidelines are:**

- extension of the tourism-season for a better use and maintenance of the existing infrastructure (economic sustainability)
- securing and renovation, of existing facilities (renovation according to regional traditions, renovation of sewage systems, development of capacities without spatial extension)
- upgrading and completion of facilities and addition of target-group oriented supplies to adapt the regional structures to the developing tourism market

- creating special offers for tourists for environmental education and visitor information, to convey the experience and the intrinsic value of nature)
- spatial concentration of touristic infrastructure and leisure activities
- utilisation of regional products and work force
- support the operation of modern, environmental adapted technologies.

### **Part 2: Presentation of the project proposals (project letters) by**

- description of the location in text and site plan
- description of the development goals
- description of the present state and the development potentials (with reference to relevant target groups)
- definition of necessary steps to achieve the development goals.

### **Part 3: Pilot project**

As a detailed pilot project the integration of a campground into an existing boarding-hostel was planned. Using land reserves within the boundaries of the property for an additional campground sets an example for development of tourism without consuming further land. The establishment of accommodation in tents is an important addition to the current boarding offers, aimed at the regional tourism-market.

The existing capacities provided by solid lodges are often overcrowded in times of seasonal peaks (with an overuse up to 130%). The campground will increase the capacity and provide flexible accommodation, to be easily adapted to actual demands and hence improve the profitability of the facility.

It is planned to establish frame tents with solid floors, separated sleeping-areas and stationary beds. Different types and price categories (US\$ 2-10) will satisfy various demands concerning comfort. In addition, a sewage plant will supply ecologically adequate treatment of wastewater.

The concept can easily be transferred to other locations, and it is meant to stimulate the development of the whole region. Furthermore a production of the tents as well as for the equipment and furnishing can be established in Kyrgyzstan.

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## **A Coordinated Partnership Effort: Restructuring Tourism in The Dubrovnik Region and in the Coastal Area of Montenegro**

### **Förderung des Tourismus und tourismusrelevanter KMU in der Region Dubrovnik-Neretva und an der Küste Montenegros**

**Inga Živkušić, GTZ Cross Border Project: Croatia-Montenegro**

When on December 6<sup>th</sup>, 1991 a defenceless Dubrovnik laid under Montenegrinian-Serbian shell-fire, the whole world rose in an outcry of shame and rage. Nobody at that time dared to wager a bet that the two regions would ever again talk to each other. Mr. Djukanovic, premier of the Republic of Montenegro, gained stature and credit almost 10 years later by offering a public historic apology.

Today, almost ten years later, the two regions are entering into a phase of pragmatic thinking of possibilities on how to overcome the communication gap. An asset, which they have in common, is tourism, traditionally the most important source of income since decades. Big industry is non-existent in the coastal belt on both sides and small and middle-sized enterprises as well as handicraft trade share their destiny with the well being of tourism.

Within the Stability Pact the Government of Germany developed a Cross Border Project labelled "Integrated Approach Towards The Promotion Of Tourism In Croatia And In Montenegro". One of its components is titled "Promotion of Tourism and Tourism Related Small Industry in the District of Dubrovnik- Nerevara and in the Coastal Region of Montenegro".

The aim of this ambitious project is to strengthen the regional cooperation and to contribute to a sustainable economic revival. The implementation is performed by the following organizations:

- the *Gesellschaft für Technische Zusammenarbeit* (GTZ) – German Agency for Technical Cooperation
- the *Deutsche Investitions- und Entwicklungsgesellschaft* (DEG) – The German Investment And Development Company, a 100% government-owned and world-wide operating development agency;
- the *Kreditanstalt für Wiederaufbau* (KfW) – Bank for Reconstruction, the internationally renowned development bank, owned jointly by the German Federal Government and the German federal states.
- the *Carl Duisberg Gesellschaft e.V.*, an association that is entrusted by the German Government in the field of spreading management knowledge by offering internships in German enterprises and/or organizing seminars or curricula in the countries of origin especially for promising second-line managers;
- the *Center For International Migration* (CIM) – a subsidiary of GTZ, which is posting long-term experts to governmental and government-owned institutions abroad in line

functions, on a par with their local counterparts, sharing rank , payment and responsibilities with them.

The tourism component, which started in 2001, is connected to the framework of the Tourism Master Plan for Croatia respectively for Montenegro. Both volumes are an integrated consultancy effort coordinated and financed by the German Government. In Montenegro, this Masterplan has already been decreed to constitute the binding projection for all regional planning work. A similar law in Croatia is expected to be signed shortly.

The target groups of GTZ' s work are in the private sector:

- small hotels, family units mostly
- private room renters
- small industry/handicraft shops, which generate peripheral products/services to tourism.

The public sector and within the self-help organizations of the economy the partners are:

- the Ministries of Tourism on both sides of the project region
- the national / regional /local bureaus of the governmental Tourism Organizations for the key personnel of the latter, jointly from Montenegro and Croatia.

GTZ organized a study tour to leading tourist resorts in Bavaria and in Tyrol to witness the structure, work and hardware equipment of the Tourist Information Service and the automatic room evidence and reservation systems.

In sharing tourist targets and visitors there is a noticeable daily excursion flow of tourists from Dubrovnik to Kotor (Bay of Kotor), which prides itself to be also a site of World Cultural Heritage. In 2000 there were 9.000 bus tourists from Dubrovnik in Kotor. The future will certainly bring the reverse traffic, or ship cruises between Dubrovnik and Kotor. GTZ will be instrumental in establishing a bilateral Joint Committee. Naturally, it will be a long way until the strain in the relations will ebb, but also a long journey starts with a first step.

When asked about the long-range view of tourism development on both sides, the opinion of GTZ is also valid for both:

First, we have the typical hen-egg-problem: who has to be there first, the tourist who is willing to spend money if he meets class, or the classy facilities? With us there is no doubt: the facilities have to be restructured, to turn them into privately owned hotels. Only private ownership will open the gate to investment, both in assets and in well paid, trained and motivated personnel. This means for both countries: bold moves in privatisation, giving up the sometimes fearsome and unrealistic sales receipt ideas, foregoing in the end precious time for restructuring and marketing for a price nirvana.

An ignition spark in this field will almost automatically trigger a jumpstart in the sector of small industry/handicraft manufacturing and in the service units that are peripheral to tourism, from boat building to restaurants, from hotel laundry washing to the production of local specialties.

When it happens, GTZ will still be there, so I hope, and will look back at the development with some satisfaction, having been a wheel in the machinery with many others, Croatian, Montenegrinian - and German ones.

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### **Förderung des Tourismus und Tourismusrelevanter KMU in der Region Dubrovnik- Neretva und an der Küste Montenegros**

Als am 06. Dezember 1991 montenegrinisch-serbische Granaten auf die zum Kulturerbe der UNESCO gehörende Altstadt von Dubrovnik fielen, schrie die ganze Welt beschämt und wütend auf. Niemand wagte zu dieser Zeit auch nur die geringsten Wetten darauf abzuschließen, dass die beiden Regionen jemals wieder miteinander reden würden. Der montenegrinische Premier Herr Djukanovic gewann jedoch an Ansehen zurück, als er fast 10 Jahre nach der kriegesischen Zerstörung Dubrovniks eine öffentliche, historische Entschuldigung im Namen seines Volkes aussprach.

Heute befinden sich die beiden Regionen nach fast genau 10 Jahren in einer Phase des Umdenkens, wie diese Kommunikations-Kluft überbrückt werden kann. Ein Vermögen, das beide teilen, ist der Tourismus, seit Jahrzehnten die Einnahmequelle Nr. 1 in beiden Regionen. Um so mehr, da sowohl im Bezirk Dubrovnik- Neretva als auch in der Küstenregion Montenegros keine Groß-Industrie vorhanden ist. Somit hängt auch das Schicksal der kleinen und mittelständischen Unternehmen und des Handels zum größten Teil vom touristischen Aufkommen ab.

Vor 1990 in Zeiten Ex-Jugoslawiens lag der Schwerpunkt auf billigem Massentourismus. Die Verlagerung von Quantität zu Qualität erweist sich als mühsam, aber nicht unmöglich. Beide Tourismusministerien arbeiten zielbewusst daran, das Billig-Image abzulegen. Zum Glück wurde rechtzeitig erkannt, dass das größte Gut die noch intakte Natur und die saubere Adria ist. Diese lässt sich natürlich nur mit qualitativem Tourismus und nicht mit Touristenmassen erhalten und birgt auf der anderen Seite ein hohes wirtschaftliches Potenzial in sich. Zentrales Motiv für den Touristen bleibt weiterhin die Erholung, jedoch sind Genuss, sinnliches Erleben, Geselligkeit, Gesundheit, Bewegung und Horizonterweiterung hinzugekommen.

Nach einem Jahrzehnt der Isolation boomte in Kroatien und Montenegro der Tourismus im Jahr 2001. Wie an den folgenden Zahlen zu erkennen ist, ist jedoch in der Region Dubrovnik noch lange nicht die Vorkriegs-Kapazität erreicht, da viele Hotels zerstört und noch nicht privatisiert sind. In Montenegro kehrt nach der Milosevic-Ära nur langsam das Vertrauen der ausländischen Touristen wieder zurück und noch immer machen die einheimischen Gäste fast 80% aus. Die junge Regierung in Podgorica schafft jedoch durch grundlegende Gesetzesänderungen die besten Voraussetzungen für eine Verbesserung dieser Situation für die Zukunft und auch bereits für die kommende Saison 2002.

Betten-Angebot und Auslastung 1990 und 2001 in der Region Dubrovnik-Neretva.

Art der Unterkunft	1990			2001 (Jan-Okt)		
	Anzahl Betten	Übernachtungen	Kapazitäts-Auslastung	Anzahl Betten	Übernachtungen	Kapazitäts-Auslastung
<b>HOTELS</b>	27.792	3.552.458	127,8%	17.996	2.104.937	117,0%
<b>CAMPING</b>	18.724	549.672	29,3%	5.500	231.310	42,1%
<b>PRIVAT</b>	22.051	483.293	21,9%	23.154	705.325	30,5%
<b>ANDERE</b>	8.643	815.861	94,3%	1.050	80.610	76,8%
<b>GESAMT</b>	77.210	5.401.284	69,9%	47.700	3.122.182	65,5%

Die Freizeitinfrastruktur ist quantitativ und qualitativ veraltet und kann daher im internationalen Vergleich nicht standhalten. Einmal fertiggestellt, wurden die, im Schnitt 30 Jahre alten Küstenhotels den wachsenden Ansprüchen an Komfort, Gastronomie und Service, an Sport und Unterhaltung nicht mehr angepasst. Hinzu kommen eine unzureichende Instandhaltung während der 10 Krisenjahre und in Kroatien außerdem noch die übermäßige Beanspruchung durch die notwendige Flüchtlingsbelegung.

#### Touristisches Aufkommen in Montenegro 1989 und 2001 am Beispiel der Gemeinde Budva.

1989		2001 (Jan-Sept)	
Anzahl Gäste	Übernachtungen	Anzahl Gäste	Übernachtungen
315.893	2.807.302	184.862	1.376.884
davon ausl. Gäste	davon ausl. Gäste	davon ausl. Gäste	davon ausl. Gäste
147.295	1.391.999	43.701	290.552

Um die regionale Zusammenarbeit unter Beachtung ökologischer und ökonomischer Grundsätze zu stärken und zum dauerhaften wirtschaftlichen Aufschwung beizutragen, hat die Deutsche Bundesregierung im Rahmen des Stabilitätspaktes für Südosteuropa ein Cross-Border Projekt entwickelt. Unter dem Titel "Integrierter Gesamtansatz zur Restrukturierung und Förderung des Tourismus in Kroatien und Montenegro" wurden von deutschen Beratern Tourismus-Masterpläne für Kroatien und Montenegro entwickelt, die vom Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung (BMZ) in Auftrag gegeben und finanziert wurden. Dieser Masterplan wurde in Montenegro zur verbindlichen Planungsgrundlage der Regierung erklärt, und auch das kroatische Tourismusministerium wird dies in Kürze unterzeichnen.

Ein solch ambitioniertes Projekt bedarf zur erfolgreichen Realisierung fähiger Durchführungs-Organisationen. Die 'Deutsche Investitions- und Entwicklungsgesellschaft mbH' (DEG) - eine bundeseigene Entwicklungsgesellschaft - wurde vom BMZ mit der Umsetzung der Masterpläne beauftragt. Eingeschaltet sind außerdem:

- die Kreditanstalt für Wiederaufbau (KfW), eine international angesehene Entwicklungsbank im Eigentum des Bundes und der Länder
- das Centrum für internationale Migration (CIM), eine Tochterorganisation der GTZ, die Langzeit-Experten in lokale Strukturen entsendet.
- die Carl Duisberg Gesellschaft (CDG), eine Gesellschaft, die im Auftrag der Bundesregierung Manager-Wissen im Ausland vermittelt in Form von Praktika in deutschen Unternehmen und/oder Durchführung von Seminaren für vielversprechende Manager.
- Last, but not least wir, die Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH, die Entwicklungshilfe-Organisation des Bundes.

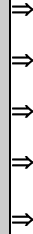
Zur Umsetzung ihres Teil-Projekts eröffnete die GTZ 2001 ein Projektbüro in Dubrovnik. Zu den Zielgruppen zählen kleine Beherbergungsbetriebe (bis 100 Betten), private Vermieter sowie kleine und mittelständische Unternehmen, die direkt oder indirekt im Tourismus tätig sind. Wir unterstützen diese mit individuellen Existenzgründer-Beratungen, erstellen Business-Pläne und helfen bei Kreditanträgen. Ebenso führen wir gemeinsam mit lokalen Wirtschafts-Organisationen (Wirtschafts- und Handwerkskammern, Unternehmerzentren) überbetriebliche Seminare zu betriebswirtschaftlichen Problemen durch.

**INTEGRIERTER GESAMT-ANSATZ FÜR DIE FÖRDERUNG DES TOURISMUS  
IN KROATIEN UND IN MONTENEGRO**

**INTEGRATED OVERALL REGIONAL APPROACH TO DEVELOPING THE TOURISM  
IN CROATIA AND MONTENEGRO**

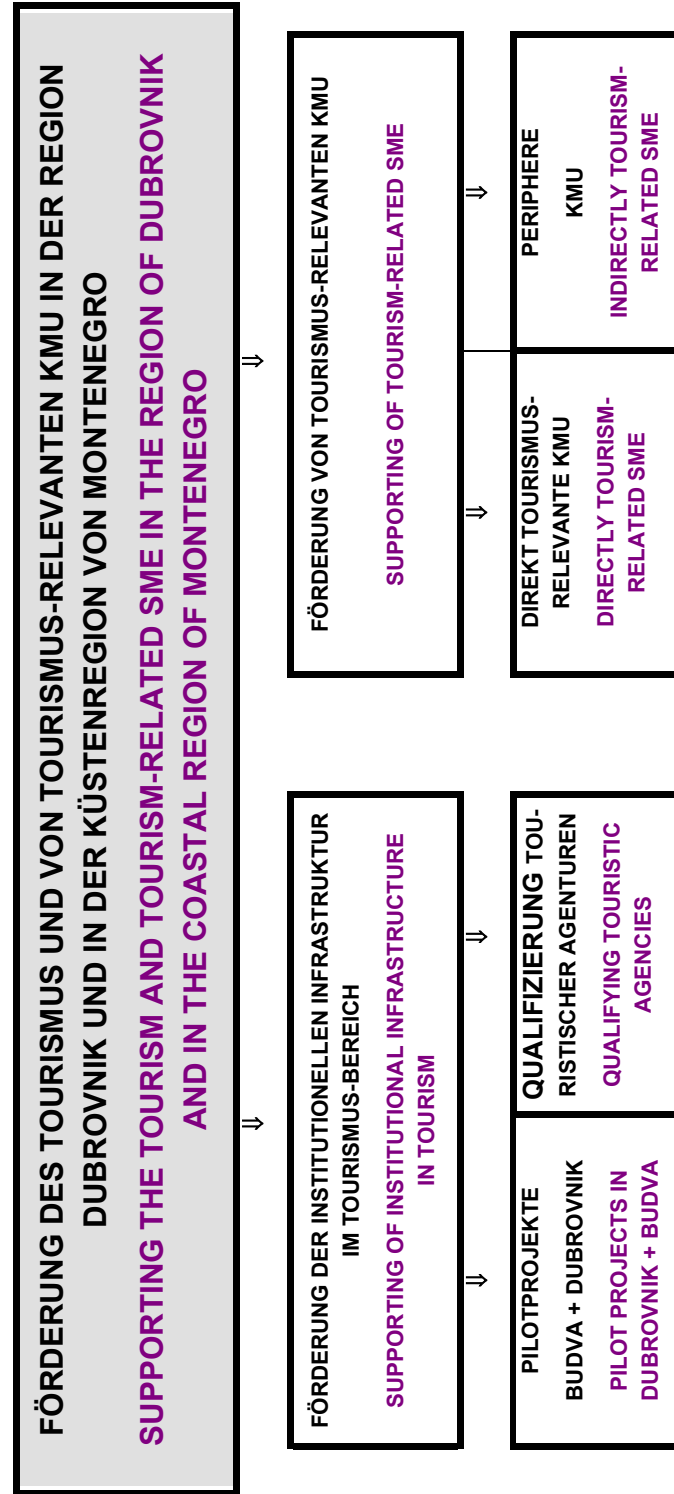


**TEIL-PROJEKTE  
SUB-PROJECTS**



CDG	DEG	KFW	GTZ
<b>ENTSENDUNG VON BERATERN IN LOKALE STRUKTUREN</b>  <b>SENDING CONSULTANTS INTO THE LOCAL STRUCTURES</b>	<b>INVESTITIONS-FÖRDERUNG IM TOURISMUS-BEREICH</b>  <b>INVESTMENT DEVELOPING IN TOURISM</b>	<b>KREDIT-LINIEN FÜR TOURISMUS-RELEVANTE KMU</b>  <b>KREDIT-LINES FOR TOURISM-RELATED SME</b>	<b>FÖRDERUNG DER INFRASTRUKTURELLEN INSTITUTIONEN + FÖRDERUNG TOURISMUS-RELEVANTER KMU</b>  <b>SUPPORTING OF INFRASTRUCTURAL INSTITUTIONS AND OF TOURISM-RELATED SME</b>
<b>AUS- UND FORTBILDUNG IM HOTEL-MANAGEMENT</b>  <b>EDUCATION, HOTEL-MANAGEMENT TRAINING</b>			

**STRUKTUR DES GTZ TEIL-PROJEKTS  
STRUCTURE OF GTZ'S SUB-PROJECT**



Im öffentlichen Sektor arbeiten wir mit den Tourismus-Ministerien beider Länder zusammen und beraten die lokalen Tourismus-Büros der nationalen Tourismusverbände. Eines unserer Ziele ist es, auf beiden Seiten Tourismus-Infopunkte mit Evidenz- und Reservierungssystemen für lokale Bettenanbieter jeder Größenordnung – vom 5-Sterne-Hotel bis zum kleinen privaten Vermieter – zu schaffen. Wie moderne Reservierungs-Systeme, Marketing und Service funktionieren können, haben wir gemeinsam mit Partnern aus Kroatien und Montenegro auf einer Studienreise durch Bayern und Tirol erkundet.

Anders, und weitaus komplizierter als bei grenzüberschreitenden Infrastruktur-Projekten (Wasser-/Abwasserversorgung, Elektrizität), die von beiden Seiten akzeptiert werden, erweist sich die Situation bei der Annäherung der Region Dubrovnik und der montenegrinischen Küste im Tourismus. Hier braucht es einen längeren Atem, um zu Regelungen zu kommen, von denen beide Seiten profitieren. Dass es aber möglich ist, zeigt beispielsweise der sogenannte „kleine Grenzverkehr“, der nach dem 2. Weltkrieg zwischen Bayern und Österreich wieder begann. Bereits im Sommer 2000 besuchten 9.000 Tagesausflügler aus Dubrovnik mit dem Bus die historische Altstadt von Kotor in Montenegro. So ist zu hoffen, dass in naher Zukunft auch wieder Ausflugsschiffe von Dubrovnik in die Bucht von Kotor fahren können, und umgekehrt.

Nach den längerfristigen Aussichten gefragt, vertritt die GTZ für beide Seiten die gleiche Meinung. Es stellt sich zunächst das typische Henne-Ei-Problem: Was muss eher da sein, der zahlungskräftige und anspruchsvolle Tourist oder das ihm entsprechende Hotel Angebot und die touristische Infrastruktur der Orte?

Für die Region Dubrovnik und die Küste von Montenegro ist die Antwort ganz klar: die Privatisierung der staatlichen Hotels muss intensiver als bisher vorangetrieben werden, unter Aufgabe der oft irrealen Preisvorstellungen. Nur die Umstrukturierung in eine privatwirtschaftliche Hotellerie kann das Tor aufstoßen zu Sach- und Personal-Investitionen, die qualitäts- und service-orientierte Gäste der Welt zufrieden stellen und an sich binden.

Erst ab dieser Initialzündung wächst auch der Markt für das tourismus-orientierte Kleingewerbe. Vom Bootsbauer bis zum Restaurant, von Hotel-Wäschereien bis zum Hersteller lokaler Spezialitäten. Ohne sie wird dieser Sektor in seiner marginalen Existenz verharren.

Mit den beiden Tourismus - Masterplänen für Kroatien und Montenegro ist der Weg aus dieser vielschichtigen Problemlage aufgezeigt. Wie alle Wege, so beginnt auch dieser mit einem ersten Schritt. Wenn es soweit ist, wird die GTZ, so hoffe ich, noch vor Ort sein und mit Stolz und Zufriedenheit auf eine positive Entwicklung zurückblicken, bei der gemeinsam mit kroatischen, montenegrinischen und deutschen Partnern ein Rad in Bewegung gesetzt wurde.

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## **Ecotourism in Russia: perspective regions, resources, achievements of international projects, possibilities for cooperation**

**Alexander Drosdov, E. Y. Ledovskikh, N. V. Moraleva  
Russian Ecotourism Association and Ecotourism Development Fund »Dersu Uzala«**

### **Ecotourism potential in Russia**

Ecotourism, with an objective of promoting the conservation and sustainable management of unique nature resources, has great potential in Russia. The international tourist attractions of the country are its landscapes and species diversity, unique network of nature-protected areas, a number of rare and endemic species, presence of vast massifs of almost untouched nature, unlike most of the European countries. There are still many areas of traditional, aboriginal type of nature use, which are of great environmental and cultural significance. At present, the ecotourism is being mostly developed in nine regions of Russia, which possess the remarkable natural beauty and a well-developed infrastructure.

According to expert estimations, the most perspective regions for Russian ecotourists (mostly from Moscow and St.Petersburg) are the Caucasus (absolute leader), Baikal, Altai and Far Eastern regions, where, unfortunately, the ecotourism development in the Caucasus now is seriously hampered due to the current political situation. The Volga-Urals, North and Central European regions are on the medium level, and the Kamchatka and Arctic regions have the least perspectives.

The classification of these regions in terms of their popularity among the foreign ecotourists is different: The leading regions at present are the European North of Russia (first of all, because of the tourists from Finland coming to Karelia), Baikal region (extremely popular in the whole world), and Kamchatka (because of the tourists from the USA, Japan and China).

### **Especially protected nature areas as an optimal ground to start ecotourism development**

One of the peculiar features of the ecotourism development in Russia is its close connection with the especially protected nature areas (NPAs) – national parks, zapovedniks (strict nature reserves), and others.

The Russian system of zapovedniks, the standards of primordial landscapes untouched by the economic activity, has no analogues in the world. A network of zapovedniks and national parks covers practically all the unique and most interesting landscapes and ecosystems ranging from Arctic tundras to sandy deserts and subtropics.

In comparison with excursions in many foreign national parks, the advantage of ecotours is Russian zapovedniks is being tête-à-tête with primordial nature and without signs of presence of other visitors. Our experience made us believe that, in present social and economic conditions, the national parks and buffer zones of zapovedniks can provide an optimal ground to start development and introduction of the principles of sustainable tourism in Russia.



This is caused by several reasons:

- At present, in most regions the NPAs seem to be the only structures, which are able to monitor and control the environmental and social impacts of nature tourism. When the increase of tourist visitation takes place in other nature areas, without proper management and control this can cause their quick degradation.
- Experienced researchers and rangers, which monitor the wildlife, all the year round form a whole network of research institutions in different nature zones. This makes the Russian zapovedniks especially interesting for the organization of scientific tours and summer field training courses for the foreign students.
- Many NPAs now have visitor centres and specialized environmental education departments. This greatly enhances the effectiveness of nature interpretation programs.
- In the new economic and political conditions, the NPAs realize that success of their activity is impossible without the public support, involvement of local communities in conservation activities. Therefore, the NPAs are actively involved in ecological education. If properly organized, ecotourism can be an important tool for environmental education.
- In the conditions of great economic and political changes in the country, faced with high unemployment rate, local population was forced to return to traditional economic activities, as cattle grazing, hay making, hunting (poaching) and gathering. Performed in an unsustainable way, it inevitably increases the conflicts between local communities and nature-protected areas and leads to the destruction of important nature complexes. Ecotourism can provide for the local population the economic incentives for conservation, change their attitude towards protected areas and ensure their collaboration.
- The zapovedniks have serious potential to start playing an important role in the local economies, promote attraction of international attention and investment capital to the region, creation of additional employment for the local population. This, in its turn, will make it possible to attract wide public attention to the issues of environmental protection and build strong public support for the protected areas.

For dozens of years, the zapovedniks were closed not only for foreigners, but also for most of the Russian citizens, as, according to the official conservation ideology, protection of nature cannot be compatible with any kind of use. In the new political and economic conditions in Russia, the budgetary funding for nature reserves had been reduced dramatically. The very survival of the unique network of nature-protected areas is threatened. Destruction of these unique ecosystems would cause negative consequences not only on the regional, but also on the global scale. To survive and provide for their further sustainable operation, the nature reserves have to look for new, alternative sources of additional funding. The policy of government regarding zapovedniks has also changed. At present, it welcomes all activities which do not contradict with their major activity and generate additional income.

In this respect, ecotourism development in the buffer zones of the nature reserves can be extremely important, as it is one of the very few (if not only) kinds of economic activities of zapovedniks, which corresponds to their primary conservation, scientific and educational goals.

### **Problems of ecotourism development in Russia**

At present, Russia's great ecotourism potential is used to a very little extent. A complex of problems, which hindered the ecotourism development in the country until recently, causes it. These problems, which are more or less typical for most of regions in the country, lay in the following spheres.

**Policy, legislation:**

- Imperfection of legislation, especially the tax policy, visa system, land use regulations.
- The mechanisms of ecotourism development at the federal level are not worked out. There is a lack of complex approach and coordination of this activity at the federal level.
- There is no unified concept, which integrates the aims of tourism development, agriculture and forestry development, culture, mining, fishery, traffic, sports, spa and health, accommodation and gastronomy, and waste management.

**Infrastructure:**

Lack or low quality of necessary infrastructure (living facilities, transport vehicles, a set of equipped ecological trails and routes, etc.).

**Geography, climate**

In many regions, the tourist season is limited only to 2-3 months per year.

**Human resources**

- The NPAs personnel have little training and experience in marketing, standards of accommodation and service and other fundamental skills, which would make their tour product competitive on the world market.
- Conservativeness of thinking, lack of motivation, low responsibility of the local personnel in many cases
- Lack of understanding of the customer interests
- Lack of specialized tour operators
- Isolation of participants of ecotourism activity, lack of information.

**Information, marketing**

- Absence in many nature reserves of ecotourism product meeting the standards of the international travel market (sets of routes and programs for different tourist categories, etc.)
- Lack of marketing information and skills is one of the most serious factors hampering ecotourism development in Russia. World community has little knowledge about Russia's natural heritage, ecotourism possibilities
- There is no stable demand for ecotourism product in the domestic market
- Influx of foreign visitors to Russia remains quite low and unstable
- Lack of detailed pre-trip and specialty information (lists of fauna and flora, rare species, etc.) for the travellers, lack of nature interpretation programs targeted to different categories of visitors in Russian NPAs.

**Ecology**

- Mechanisms are not in place to determine carrying capacities for NPAs and thoroughly monitor tourism impacts. This makes them vulnerable against possible ecological problems of tourism organized without proper planning and control.
- Very few tourism programs provide for active involvement of visitors in the conservation activity. More often, an excursion or tour is aimed to demonstrate exotic "wonders and beauties" of nature rather than to better understand environmental problems.

**Management, economics**

- Low diversity of the services and products do not provide adequate means for tourists to spend money, so nature protected areas are not in the position to gain financially from tourism

- No unified civilized standards of pricing tourist services rendered by the NPAs. Many NPAs keep incredibly high, or, to the contrary, under-estimated prices.
- Absence of specialized and qualified structures able to organize and coordinate the ecotourism development processes at the regional scale.
- Expensive transportation resulting from carrier monopoly inherited from the previous non-market economy and vast expanse of the country.
- Inadequately high prices for accommodation and food, caused to a certain extent by the inefficient national tax policy.
- The largest portion of the economic benefits accrue to individuals and organizations outside the host country (international airfares, outbound tour operators, etc.)
- There is no assurance that a portion of the financial gains from ecotourism benefits the local communities. Most of the NPAs seriously underestimate the necessity of participation of the local population in the ecotourism development.

### Ranging of various regions of Russia

All the parameters of each region are estimated according to the 5-point scale and summarized; the range of the region is identified according to the total value. Table 1: Ranging of various regions of Russia. Values of parameters: 1 – worse indicators, 5 – best indicators. Ranges: 1 – highest, 4 – lowest. Protected areas: concentration of nature protected areas; Accessibility means the accessibility related to the transportation cost.

Range	Region	Protected areas	Diversity of landscapes	Accessibility	Infrastructure	Ecological and climatic conditions	Popularity during the last years	total
2	Altai	5	4	3	2	5	3-4	2-3
4	Arctic	1	2	2-3	1	5	1	1
2	Baikal	5	4	3	2	5	3	2-3
2	Far East	4	4	2	3	4-5	4	2
4	Kamchatka	1	4	1	1	5	2	1
1	Caucasus	3	5	3-4	4	3-4	5	4-5
3	Volga-Urals	2	3	3-4	3	2	4	3
3	N European	2	3	3-4	3	3	3	4
3	C.European	2	1	5	5	1	4	3

### Achievements of the ecotourism development in Russia

During the last years some serious steps had been made towards solving many of these problems, minimization of the negative impacts of ecotourism and maximization of its potential benefits for nature conservation and local development. This was mostly connected with the implementation of a number of ecotourism development projects, aimed to introduce the international concept of ecotourism in Russia and provide conditions for its sustainable and effective development just in the very beginning.

### **Ecotourism development projects in Russia implemented in the last years:**

- Development of the ecotourism foundations in the nature reserves of the Primorye Region, the Russian Far East” (1996-1998, funded by the US Agency for International Development, USAID, and WWF)
- Ecotourism development in the Altai-Sayans Ecoregion (1999-2000, funded by the USAID-ISC in the framework of the ROLL program)
- Development of ecologically sustainable Tourism in the North Caucasus” (2000-2001, funded by the ROLL program)
- Ecotourism development in Baikal (1997-1998, World Bank; 1999-2000, ROLL program)
- Ecotourism development in the North-West of Russia (1998-2000, funded by TACIS, continued in 2001-2002)
- Project of the WWF Denmark for ecotourism development in a number of Central European Nature Reserves (2001).

### **What was done in Russia for ecotourism development?**

- More than 150 ecotourism programs for various categories of visitors are developed in the Russian Far East, Altai, Baikal, Khakassia, Sayans, Tuva, Krasnoyarsk Region, Caucasus, European North, etc. They include general cognitive ecotours, adventure ecotours (rafting, trekking, horseback riding), specialized programs (bird watching, botanical, archaeological and ethnographic), scientific tours and student practices, weekend excursions, etc.
- Recreation capacities are assessed for ecotourist routes in more than 30 nature reserves and national parks
- Tourism development programs and management plans are worked out for several nature reserves
- Environmental education centres are organized, equipped and work successfully in the nature reserves of the Far East, Altai-Sayans ecoregion, European North, etc.
- A complex of lectures and excursions is developed for the NPAs visitors
- Infrastructure is improved, a number of ecological trails are equipped in the nature reserves
- Ecotourism training workshops had been conducted for the personnel of nature reserves, representatives of administrations and tour operators in the Altai-Sayans ecoregion, Caucasus, etc.
- A series of publications had been prepared, including the booklets for many nature reserves, illustrated books presenting the NPAs and ecotourism possibilities in various regions of Russia; web site [www.ecotours.ru](http://www.ecotours.ru) had been developed.
- A complex advertising and marketing campaign had been organized in Russia and abroad;
- The experience of cooperation with local population is obtained (sociological reviews were carried out in the Altai-Sayans ecoregion, development of local crafts was supported in the Caucasus, local guides are trained, etc.)
- The program for ecotourism development had been included in the regional Tourism Development Program in the Republic of Karachaevo-Cherkessia (Western Caucasus), approved at the governmental level.
- The Ecotourism Development Concept had been developed and included in the “Major Directions of Activity for the period until 2010” for the state nature reserves and national parks, approved by the Russian Federation Ministry for Environmental Protection.
- In 2001, volumes of ecotour operating increased 3 times compared with the previous years.

By the end of 2000, 76 nature reserves (79%) have developed different types of excursion and ecotourist activities. 22 of them (24%) had already equipped or were in the process of equipping the ecological trails. Organized tourist groups had visited 64 (67%) of the nature reserves. Foreign ecotourist groups had visited 47 (49%) of the nature reserves. In 1999, the total number of visitors to the nature reserves was 140 643, including 5057 foreign tourists. Respectively, 612 301 tourists had visited the national parks, including 41 399 foreigners.

### **Russian Ecotourism Association**

In September 2001, the Russian Ecotourism Association was founded on the initiative of the Ecotourism Development Fund “Dersu Uzala” with the support of the WWF-USAID ecotourism development project. It was the first time when different stakeholders– protected areas, governmental structures, NGOs, representatives of the tourism business– united their forces to work together. As a result, we have now a Russian structure, which aim to coordinate the ecotourism development in accordance with international principles and guidelines. The founders of the Associations are: the zapovedniks and national parks; their regional associations from the North-West, the Central Russia, the river Yenisey, the Far East; non-governmental organizations, RATA (Russian Association of Travel Agencies). The Board of Trustees includes the Department of Nature Protected Areas of the Ministry for Natural Resources, Tourism Department of the Ministry for Economic Development, WWF, Russian Geographical Society, etc. The objectives of the Association are:

- Unite and coordinate efforts of Russian nature reserves, travel agencies, educational establishments, NGOs and other organizations in developing ecotourism as an effective form of social-economic activity;
- Provide for the informational exchange between Russian nature reserves and international ecotourism organizations; consulting and methodological support; creation of databases and information systems on the ecological tourism in Russia;
- Prepare publications to inform the Russian and international community about Russian natural and cultural heritage and ecotourism possibilities;
- Market and promote the Russian ecotourism product on the domestic and international market;
- Develop the programs and organize training courses for the personnel working in the sphere of ecotourism at different levels;
- Elaborate a national system of voluntary certification of the ecotourism services in accordance with the international principles of sustainable tourism;
- Promote development of small business associated with tourism.
- Introduction of the mechanisms of monitoring and control of tourist activities in order to avoid environmental damage;
- Promote the development of ecologically sound infrastructure;
- Involve of the local population;
- Introduction of the unified and civilized standards of pricing the ecotourism products and services;
- Preparation of proposals for the development of federal, regional and local normative documents related to the rational use of natural resources, preservation of natural and cultural heritage, sustainable tourism development;
- Development and implementation of the international projects for conservation and development of ecologically sustainable tourism in Russia.

The foundation of the Russian Ecotourism Association is an event of great importance and the first step of the country towards the International Year of Ecotourism. Also it is our first step in putting into practice the International Guidelines for Sustainable Tourism and Biodiversity of the Convention on Biological Diversity (CBD).

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## **Role and Position of a Tourism Information Office in the Promotion of Ecotourism – the Case of Cameroon**

**Robert Tchabda, Director of the Tourism Information Office of Cameroon in Europe**

In fact, a tourism information office settled in countries of tourists potential can be defined as a structure to enhance promotion actions of tourism administrations for countries, which have made the tourism industry to a prior branch of their economical sector.

As far as Cameroon is concerned, tourism is a main issue among five other priority sectors, for both the Head of State and his Government. Thus, the first Cameroonian National Tourism Office was opened 1999 in Paris.

How can this office contribute to the development and the promotion of the Cameroon ecotourism product? Before answering to that question, let me briefly present the Cameroon ecotourism concept to you.

Cameroon benefits from important natural, human and cultural resources, which can enable the development of a wide range of ecotourism categories:

- Seaside tourism
- Mountain tourism
- Safari tourism
- Cultural tourism
- Ecological tourism.

Actually, Cameroon presents a high tourism potential, from the dense equatorial forest in the South, to the desert savannah of the North, through the mountain chain in the West (much compared to the French Auvergne), and to the vast Adamaoua plateau which is the transition between the southern dense forest and the northern savannah, towards the Atlantic ocean coast with the Mount Cameroon, 2<sup>nd</sup> high summit of Africa. The wide dense forest is wild and shelters an extraordinary flora and fauna where the pygmies live, the people, which are considered to be the first inhabitants of Cameroon.

It is easy to compare Cameroon with other ecotourism and ethno- cultural destinations. Namely with the South equatorial forests of Amazon and South-East Asia. Yet, Cameroon has more other natural gifts: a full range of the African fauna, such as lions, elephants, giraffes, black rhinoceros, buffaloes, hippopotamus, gorillas, gazelles, etc.... Furthermore it has more than hundreds types of birds and rivers, lakes full of fish, out of which some are not even indexed.

As far as we are concerned, ecotourism must bear the required aspect of Ethno-Culture. Cameroon is proud to be one of the rare countries, which has more than 250 ethnic groups, many languages and a cultural diversity with numerous traditional kingdoms.

When we present this offer to tourists, the most frequent question is about the main characteristic of the product in comparison to the others? The answer: "Cameroon presents two characteristics":

- Its diversity in terms of landscapes, climate, fauna, population and traditions, which is the reason why tourism specialists talk of Cameroon as Africa in a country.
- Ecotourism sites unique in the world: the Kapsiki summits in the far North and direct falls in the Atlantic Ocean in Kribi.

### 1- The Cameroon problematic ecotourism

Although Cameroon presents lots of tourism resources with a variety of products, it is still difficult to sell them for the following reasons:

- Most of the ecotourist sites are not exploited because it is difficult to get there, hard to observe animals, and there is a lack of accommodation.
- Insufficient tourism culture.

### 2- The European demand for the ecotourism Product

The here above mentioned reasons show that the demand for our ecotourism is still very low. In fact, Cameroon records less than 200 000 tourists per year. The demand is rather higher for safaris and cultural tourism and other discovery trips. More and more consumers ask for an intelligent tourism where they can learn while travelling: (for example: learning the pygmies ways of life over a visit to their camps).

### 3- Role and position of the national Tourism Office in Ecotourism promotion

The principal role of the National Tourism Office in the promotion of ecotourism is first of all to inform, present and communicate Cameroon on potential ecotourism markets in order to boost tourists and European investors to visit and invest in Cameroon.

The national Tourism Office also contributes to the creation of a promotion and development tourism partnership with European and Cameroonian operators.

We therefore have a central position between the different operators of that sector:

We must not only provide **Tour Operators** with information on destinations, but also contribute to finance the product (selling catalogues). Moreover, we must guarantee the follow up of permanent contacts with them, as their main concern is the quality of both, the product and the service.

**The media** are the communication links with the public and the professionals, and we provide them with articles, films, etc. We also organize trips to inform the press and give them the opportunity to make documentaries or brochures on specific topics.

### 4- Information material

The information support is designed in order to meet the needs of consumers (clear and articulated information) divided in four categories:

- Professional brochures
- Selling material designed for Tour operators and others
- Press books for journalists
- Folders and leaflets for the public
- Posters
- Visual support: Video cassettes, photos

Our brochures are issued in the languages of the countries where we dispatch them: e.g. in French, German, English, Italian and Spanish.



Generally speaking, the national tourism information office plays the role of an ecotourism promoter in countries with potential tourists. In a certain way it is a link of information gathered by the Ministry of Tourism and other Cameroonian administrations.

### **5- Some of the achieved actions**

After one year and a half following its opening, our office achieved the following actions for the ecotourism promotion:

- a workshop with tour operators, European journalists and Cameroonians professionals in Paris on 22nd March 2001 on the theme: "Discovery of the natural Cameroon".
- The national tourism office took part to ten tourism events:
  - The Utrecht holiday grant
  - The Madrid FITUR
  - BIT/Milano
  - ITB/Berlin
  - World Tourism Salon/ Paris
  - Top Resa/ Drauville
  - Mahama/Lyon
  - International Fair/ Paris
  - MIT-International/Paris
- organization of press trips and ecotours to discover Cameroon as an ecotourism destination
- organization of external presentations, such as the open door day on 13<sup>th</sup> December 2001 in Orly (France)

The here above mentioned actions created an increase of 20% of the ecotourism demand over the 2000/2001-tourism season. Concrete development ecotourism projects are being carried out by private European operators in the regions of Kribi /Campo /Ma'an. One of them is the "Untamed wildlife safaris" of a Dutch promoter.

### **6- Some difficulties**

In our mission, we come across the following problems:

- Insufficient qualitative and quantitative human means
- Insufficient financial means to cover our action programs
- The lack of professionalism among Cameroonians operators
- The high cost of Cameroon destination in comparison to its competitors
- Lack of fittings in most sites
- Lack of direct flights from important departure airports such as Germany, Holland, Spain.
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### **7- Some proposals**

The solutions for these problems are the ongoing efforts of the Cameroonian government on one hand, as far as promotion is concerned to introduce local actors to the problem of high quality tourism. On the other hand, international cooperation plays its part, and we want to take this opportunity to thank on behalf of the Cameroonian Ministry of Tourism, the German cooperation mission for the technical and financial assistance, including the promotion of international ecot-

ourism at the FORUM INTERNATIONAL. In fact, we think that building a new image for Cameroon as a destination at the international scale can only be done thanks to cooperation of intellectual, physical and financial efforts of public and private actors as well as foreign partners.

## **8- Prospects**

The following actions are essential for the development and promotion of ecotourism in Cameroon in order to increase the number of tourists:

- identification of target markets, in particular the ones, which represent a high yield potential for Cameroon.
- identification of local ecotourism products representing a genuine originality in comparison to competitor destinations
- the elaboration of a global marketing plan (that study is in progress)
- the mobilization of support to carry out the promotion of development tourism projects
- the definition of clear objectives as well as of a long- lasting development tourism strategy
- as ecotourism has definitely become the product of this third millennium, which contributes to the well being of human kind, we wish that this bilateral and multilateral development promotion of lasting tourism further intensifies.

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