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Sustainable development and tourism: towards quality growth

Report
Committee on Economic Affairs and Development
Rapporteur: Mr José Mendes Bota, Portugal, Group of the European People's Party

Summary

Europe is the world's most visited region. As mobility and affordability of travel increase with globalisation, visitor flows will intensify. There is a real risk of overcrowding, congestion, strain on natural and cultural resources and stress to local communities beyond acceptable levels at major tourism hotspots across Europe. Moreover, large seasonal and geographical fluctuations erode employment conditions. At the same time, developing tourism in Europe's disadvantaged regions – off the beaten track – could bring more local prosperity, especially at times of painful economic restructuring.

Ensuring balanced development is both a challenge and an opportunity for European countries if they want to stay competitive long-term in the global race for welfare gains through tourism. They should therefore seek *not more but better* tourism, with emphasis on value rather than volume. Sustainable development, which relies on a synergy of economic, social, environmental and cultural goals, offers a way forward whereby growth and quality become mutually reinforcing. A long-term vision and a holistic approach to development are necessary for Europe to lead the way not only as the most popular but also the most successful tourist destination.

The report underscores the importance of authenticity and diversity as sources of quality growth in European tourism. It pleads for greater attention to be paid by European policy makers to the issues of safety and security, congestion management, the threat of climate change, accessibility and hospitality problems, as well as dialogue with the private sector, while proposing a series of targeted measures at pan-European, national, regional and local levels. Europe can either reap vast benefits from the sustainable development of tourism or face the consequences of unbridled growth.

A. Preliminary draft Recommendation

1. Europe has a long and successful history of attracting visitors: it remains the world's most visited region offering a wealth of experiences in distinct history, scenery, culture and lifestyles. Seven European countries – France, Spain, Italy, the United Kingdom, Germany, Austria and the Russian Federation – are among the world's ten most visited destinations. Overall, nearly half of all visitors globally (478 million) travelled in European countries in 2007, and tourist flows in Europe are expected to double in the next two decades as mobility and the affordability of travel increase with globalisation. This is both a development challenge and an opportunity, if European countries want to stay competitive in the global race for welfare gains through tourism.

2. People-to-people contacts generated through travel and tourism can facilitate mutual understanding and international diplomacy. They help to build a community of values in Europe which stands out as an example on the global scene. European countries, as represented by the Council of Europe, should put human beings and sustainability at the heart of their development policies, not least as regards tourism. A long-term vision and a holistic approach to development are necessary for Europe to lead the way as the most popular and successful tourist destination.

3. Expanding on average by 3-4% every year, tourism has grown into a major economic activity in Europe, directly accounting for some 24 million jobs, 4% of cumulative GDP and US\$ 374 billion in annual revenue. A quarter of all tourism is linked to business travel in support of wealth creation, skills and technology transfer, entrepreneurship and connections between markets. In the last few years, tourism development has been particularly dynamic, though uneven, in central and eastern Europe, enabling the region's countries to catch up with western Europe in terms of economic development and living standards but also leading to major socio-economic pressures due to swelling visitor flows. It is essential to concentrate efforts on promoting the development of *quality* tourism in these states and across all Europe to allow tourism to make a substantial and lasting contribution to overall balanced and sustainable development while avoiding the excesses seen at some mass tourism destinations.

4. The quantitative and qualitative aspects can and should be reconciled through the sustainable development of tourism based on a synergy of economic, social, environmental and cultural benchmarks. Promoting diversity, authenticity and quality in tourism is a key to lasting success. Thus economic viability, local prosperity, employment quality, social equity, visitor fulfilment, local control, community wellbeing, cultural richness, physical integrity, biological diversity, resource efficiency and environmental purity are imperatives that should be taken into account for shaping a long-term development vision and strategies.

5. Safety and security are major prerequisites for tourism and travel to prosper. Although Europe has a good reputation for safety, it is not immune to security threats. Council of Europe member states must stay vigilant and reflect on how security could further be upgraded at all levels in a discreet way and in full respect for human rights, ethical values and the rule of law. It is necessary for the Council of Europe member states to review their alert and crisis management systems, including evacuation plans, security communication with the public and cross-border cooperation arrangements. The Council of Europe and its Parliamentary Assembly should also study more closely the legitimacy of new security demands for transatlantic travel recently presented by the US Administration vis-à-vis European states.

6. With new technologies, evolving consumer behaviour and simplified travel planning, congestion is increasingly frequent in transport, accommodation and tourist sites in many European holiday destinations and business hubs while many peripheral or secondary locations, on the contrary, suffer from the lack of visitors' attention. The congestion causes stress to visitors, disruption to local communities and often a degradation of tourist sites and services. There is an urgent need to better manage tourist flows in order to optimise the use of facilities and resources geographically and time-wise.

7. Our lifestyles, wellbeing and economies will be gradually affected by climate change. In Europe, northern and southern regions and mountain, island and coastal areas likely to suffer the worst effects but all countries will have to face more intense and frequent climatic disorders and extremes, such as heat waves, droughts, heavy precipitation or storms, as well as related problems, such as forest fires, floods, effects on wildlife and biodiversity, coastal erosion, infrastructure damage, infectious diseases, water levels and lack of resources. As a highly climate-sensitive sector – like agriculture, energy, insurance and transport – tourism needs to adapt and contribute to global efforts to tackle climate change, essentially through cuts in greenhouse gas emissions from transport and accommodation.

8. Although holidays, and by extension travel, are a right, about 40% of Europeans do not leave on holidays owing to various forms of deprivation or disability. Families, senior citizens, immigrants, the young and people with disabilities are particularly concerned. Greater attention to the social aspects of tourism could help reduce the seasonality of demand and excessive geographical concentrations of travellers, as well as supporting more stable year-round employment and the development of disadvantaged regions, especially if more travellers could be persuaded to travel outside the main season and/or the busiest areas. Several important issues should be addressed: the physical accessibility of tourist destinations and sites, the economic affordability of holiday travel and better information on travel options for potential travellers with special needs.

9. Tourism enriches when it takes place in a balanced way resulting in a win-win situation for both visitors and hosts. If state authorities and international institutions are primarily responsible for providing political commitment and policies conducive to sustainability in tourism, the contribution of the private sector is critical to yielding results on the ground and providing feedback to policy makers. Public and private actors should work together to agree, implement and monitor the integrated quality management approach respectful of reference quality standards for tourism services and products. Whilst tourism and sectoral associations can act as information relays between state authorities and local actors, public-private partnerships might serve to realise pilot projects, promote corporate social responsibility and implement equitable employment schemes, improved pricing models, innovative destination marketing and investment planning compatible with environmental, cultural and social imperatives.

10. Tourism is first and foremost about people of all ages, interests and skills. Quality tourist services require dedicated and competent people involved as local inhabitants or tourism professionals. *Hospitality*, with a caring attitude towards people, traditions and heritage, and knowledge of foreign languages, plays an increasingly prominent role. It goes together with *sustainability* based on responsible consumption and production patterns to minimise resource waste and pollution, and emphasis on value rather than volume. These notions should be taught early at schools. A fair share of revenue from tourism should be reinvested in local development.

11. Sustainable development of tourism holds much promise for Europe and beyond. Growth and sustainability are compatible targets when properly managed. Development challenges, that stem from evolving lifestyles, economic growth and restructuring, demographic trends and globalisation, call for calibrated national, regional and local but also collective – pan-European – responses. In this context, the Assembly underlines the importance of studying the implications of tourism growth on infrastructure development in Council of Europe member states.

12. The Assembly therefore asks the Committee of Ministers

12.1. to incite national governments of the Council of Europe member states:

12.1.1. to ally long-term thinking, best practices and a sum of ambitious economic, social, environmental and cultural benchmarks for shaping national tourism development policies;

12.1.2. to screen the compatibility of national tourism legislation and policies with the principles of sustainable development and relevant Council of Europe conventions in the environmental and cultural fields;

12.1.3. to involve tourism in the implementation of existing commitments under the UN Framework Convention on Climate Change with its Kyoto Protocol and contribute to the preparation of the new package of measures for the post-2012 period;

12.1.4. to support the implementation of international co-development policies, including the Millennium Development Goals, environmental agreements, the UNWTO's Global Code of Ethics for Tourism, the Clean Development Mechanism, multilateral and bilateral aid programmes, in order to help the emerging economies to match their development needs with the drive for more tourism;

12.1.5. to promote domestic – intra-country and intra-European – tourism whereby distances travelled are shorter and means used can rely more on public transport;

12.1.6. to mitigate the impact of carbon emissions due to long-haul travel and transport, not least through the 'polluter pays' principle and a greater participation of European airlines in the

EU Emissions Trading System, as well as via tax incentives encouraging a shift from road to rail in goods transport on major European transit corridors;

12.1.7. to encourage responsible consumption and production patterns minimising resource waste and pollution (especially as regards water and energy use, recycling, waste management, forward planning, etc.) and propagating meaningful alternatives (such as greater recourse to renewable resources, public transport, sustainable construction, etc.) in providing tourism services;

12.1.8. to promote the sharing of knowledge and good practice on sustainable tourism development with other countries and regions;

12.1.9. to consider restructuring national tourism organisations to work as public-private partnerships;

12.1.10. to support the development of family-friendly travel and accommodation options;

12.1.11. to accelerate the implementation of the Council of Europe Plan 2006-2015 for people with disabilities;

12.1.12. to encourage and facilitate travel to various European destinations by niche travellers (the young, the elderly, families, the disabled and repeat/experienced visitors) as a means of ensuring a more even geographical and seasonal spread of visitor flows across European regions;

12.1.13. to carry out regular national and enterprise security audits;

12.1.14. to establish or designate, as may be appropriate, multilingual national tourist safety focal points and emergency call centres;

12.1.15. to reassess their alert and crisis management systems, including evacuation plans, security communication with the public and cross-border cooperation arrangements;

12.1.16. to instruct a competent Council of Europe expert committee to study the compatibility of new security demands for transatlantic travel, presented by the United States authorities, with the Council of Europe's values and legal *acquis*, especially on personal data protection, with a view to presenting recommendations on the matter;

12.1.17. to make better use of new security and defence technologies for civil protection, including in the tourism sector;

12.1.18. to set up regulatory incentives and binding minimum targets for promoting sustainable construction and renovation of buildings;

12.1.19. to seek that a fair share of direct and indirect income generated from tourist visits be channelled towards the further development of cultural and natural assets;

12.1.20. to support the development of tourism as an alternative source of local income and jobs in areas undergoing economic decline and depopulation, especially in rural and mountainous regions;

12.1.21. to promote quality certification schemes for tourist services and products;

12.1.22. to study the feasibility of including hospitality and sustainable development concepts into school curricula;

12.1.23. to ensure the effective protection of tourists' consumer rights;

12.2. to invite the Congress of Local and Regional Authorities:

12.2.1. to study the impact and implications of low-cost travel on local development and employment conditions with a view to possibly formulating guidelines on the matter;

12.2.2. to carry out comparative studies of visitor management frameworks and prepare guidelines on the subject;

12.2.3. to ensure effective local oversight regarding the implementation of regulations on spatial planning;

13. The Assembly invites national parliaments to ensure that national legislation is in place with a view to orienting investors, tourists and other stakeholders and ensuring an appropriate government response to sustainable tourism development issues.

B. Explanatory memorandum by Mr Mendes Bota, Rapporteur

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Appendix: Global Travel and Tourism Competitiveness Index (extracts)

I. Introduction: tourism as a source of economic growth, human development, social cohesion and national prosperity in Europe

1. Europe is the world's most visited region. Its complex history, geographical diversity and cultural riches continue to attract ever more visitors. Out of 898 million tourist arrivals in the world in 2007, about 478 million (48%) were recorded in Europe – an increase of at least 19 million over 2006 as compared to a 52 million increase for the world. The preliminary data for 2007 shows a steady 4% growth in tourist arrivals in Europe compared to a 6% growth rate for the world. Seven European countries (France, Spain, Italy, United Kingdom, Germany, Austria and the Russian Federation) remain among the world's ten most visited destinations. Since this trend has been sustained over years and decades, tourism has grown into a major economic activity significantly contributing to welfare gains, cultural exchanges, social cohesion and overall development across Europe. According to the estimates of the World Tourism Organisation, tourist flows in Europe are expected to double over the next 15 years, accounting for about a half of some 1600 million international arrivals expected worldwide already in 2020.

International tourist arrivals by country of destination (Totals and % change between years)

Country and 2006 ranking	1995	2000	2004	2005	2006	04/03	05/04	06/05
	In millions					In %		
1. France	73.1	77.2	75.1	75.9	79.1	0.1	1.0	4.2
2. Spain	46.8	47.9	52.4	55.9	58.2	3.1	6.6	4.1
3. United States	48.5	51.2	46.1	49.2	51.1	11.8	6.8	3.8
4. China	27.0	31.2	41.8	46.8	49.6	26.7	12.1	6.0
5. Italy	36.5	41.2	37.1	36.5	41.1	-6.4	-1.5	12.4
6. United Kingdom	23.3	23.2	25.7	28.0	30.7	12.7	9.2	9.3
7. Germany	17.1	19.0	20.1	21.5	23.6	9.4	6.8	9.6
8. Mexico	19.0	20.6	20.6	21.9	21.4	10.5	6.3	-2.6
9. Austria	17.5	18.0	19.4	20.0	20.3	1.5	3.0	1.5
10. Russian Federation	n/a	n/a	19.9	19.9	20.2	-2.7	0.2	1.3
11. Turkey	6.9	9.6	16.8	20.3	18.9	26.1	20.5	-6.7
12. Canada	19.4	19.6	19.1	18.8	18.2	9.2	-2.0	-2.8
13. Ukraine	4.2	6.4	15.6	17.6	n/a	24.9	12.8	n/a
14. Malaysia	7.9	10.2	15.7	16.4	17.5	48.5	4.6	6.8
15. Hong Kong (China)	7.8	8.8	13.7	14.8	15.8	41.1	8.2	7.1
16. Poland	18.0	17.4	14.3	15.2	15.7	4.2	6.4	3.3
17. Greece	12.2	13.1	13.3	14.3	16.0	-4.7	10.9	8.6
18. Thailand	8.7	9.6	11.7	11.6	13.9	16.4	-1.4	20.0
19. Portugal	11.6	12.1	10.6	10.6	11.3	-9.1	-0.3	6.3
20. Netherlands	9.9	10.0	9.6	10.0	10.7	5.1	3.8	7.3
22. Hungary	2.8	n/a	12.2	10.0	9.3	n/a	-18.3	-7.2
23. Croatia	3.8	5.8	7.9	8.5	8.7	6.8	7.0	2.3
26. Ireland	6.4	6.6	7.0	7.3	8.0	2.8	5.5	9.1
28. Switzerland	7.2	7.8	n/a	7.2	7.9	n/a	n/a	8.8
30. Japan	4.4	4.8	6.1	6.7	7.3	17.8	9.6	9.0
31. Belgium	6.4	6.5	6.7	6.7	7.0	0.3	0.6	3.7
34. Czech Republic	5.6	4.8	6.1	6.3	6.4	19.4	4.5	1.6
36. Bulgaria	2.5	2.8	4.6	4.8	5.2	14.4	4.5	6.6
40. Denmark	2.0	3.5	4.4	4.7	n/a	27.3	6.3	n/a
46. Norway	3.2	3.1	3.6	3.8	3.9	11.0	5.4	3.2
50. Finland	2.5	2.7	2.8	3.1	3.4	3.0	10.6	7.5
<i>Other countries in Europe</i>								
Sweden	2.3	2.7	3.0	3.1	3.3	1.7	4.3	4.4
Cyprus	2.1	2.7	2.3	2.5	2.4	2.0	5.2	-2.8
Andorra	..	2.9	2.8	2.4	2.23	-11.0	-13.4	-7.9
Lithuania	0.7	1.1	1.8	2.0	2.2	20.7	11.1	9.0
Estonia	0.5	1.2	1.75	1.92	1.94	19.7	9.5	1.2
Latvia	0.5	0.5	1.08	1.12	1.54	11.2	3.4	4.3
Slovenia	0.7	1.1	1.5	1.55	1.62	9.2	3.7	4.0
Slovakia	0.9	1.1	1.4	1.5	1.61	1.0	8.1	6.4
Romania	0.8	0.9	1.36	1.43	1.38	23.0	5.0	-2.4
Azerbaijan	0.1	0.7	1.35	1.18	1.2	33.0	-12.7	1.4
Malta	1.1	1.2	1.2	1.17	1.12	3.4	1.3	-4.0
Luxembourg	0.8	0.8	0.87	0.91	0.91	1.2	4.0	-0.5.
Iceland	0.2	0.6	0.83	0.87	0.97	8.4	4.2	11.4
Serbia & Montenegro	0.2	0.2	0.6	0.73	0.5+0.4	20.5	25.0	3.5+39
Georgia	0.1	0.4	0.4	0.54	n/a	17.5	48.8	n/a
Europe	312	390	419	436	459	4.3	4.0	4.4
World	536	684	761	802	846	10.1	5.4	5.5

Source: UNWTO World Tourism Barometer 2007 and Tourism Market Trends 2006 Edition

2. Viewed narrowly, tourism is often seen in terms of tour operators, guides, travel agencies, recreation facilities, entertainment, food, transport and accommodation services. However, from a broader perspective tourism appears as a cross-cutting activity that affects many other sectors ranging from regional and local planning to retail trade. Globally, tourism represents some € 2.9 trillion (US\$ 4.2 trillion), or 10.4%, of cumulative GDP. In the European Union, tourism accounts *directly* for over 4% of GDP (ranging, in 2006, from 1.3% of GDP in Latvia to 13.2% of GDP in Malta) and about 11% of GDP if links with other sectors are considered. For non-EU European countries, tourism represents from 1.3% of GDP in Serbia and Montenegro¹ to 6.3% in Iceland and 6.2% in Switzerland. It involves directly some 1.4 million enterprises, essentially SMEs, and

¹ Based on estimates from the World Travel and Tourism Council (WTTC), TSA Research 2006. Data for Armenia, Azerbaijan, Georgia and Moldova were not available.

generates about 24.3 million jobs as one out of eight working Europeans is employed in the tourism sector² and jobs in tourism-related sectors are created faster than the average for the European economy. Tourism jobs are particularly important for the employment of young people who account for twice the share of the labour force in tourism than in any other sector. European tourism still accounts for a half of the global market well ahead of Asian countries (19.3%) and the Americas (16.5%), but global competition is stiffening and capacity problems are increasingly felt in a number of popular European destinations.

International tourist receipts by country (Totals and % change between years)

Country and 2006 ranking	1995	2000	2004	2005	2006	04/03	05/04	06/05
	In billion US\$					In %		
1. United States	63.4	82.4	74.5	81.8	85.7	15.8	9.7	4.8
2. Spain	25.3	30.0	45.2	48.0	51.1	3.8	6.0	5.6
3. France	27.5	30.8	45.3	44.0	46.3	12.6	-2.8	4.3
4. Italy	28.7	27.5	35.7	35.4	38.1	3.8	-0.7	6.7
5. China	8.7	16.2	25.7	29.3	33.9	47.9	13.8	15.9
6. United Kingdom	20.5	21.9	28.2	30.7	33.7	11.1	9.5	8.5
7. Germany	18.0	18.7	27.7	29.2	32.8	8.9	5.4	11.3
8. Australia	8.1	9.3	15.2	16.9	17.8	8.5	6.9	7.3
9. Turkey	5.0	7.6	15.9	18.2	16.9	20.3	14.2	-7.2
10. Austria	12.9	9.9	15.6	16.0	16.7	1.5	2.7	3.1
11. Canada	7.9	10.8	12.9	13.6	14.5	13.3	1.7	0.2
12. Greece	4.1	9.2	12.9	13.7	14.3	9.0	6.7	2.9
13. Thailand	8.0	7.5	10.0	9.6	12.4	24.3	-4.4	22.0
14. Mexico	6.2	8.3	10.8	11.8	12.2	15.3	9.3	3.2
15. Switzerland	9.5	7.8	9.5	10.0	10.7	6.1	5.1	6.3
16. Hong Kong (China)	7.8	5.9	9.0	10.3	11.6	26.1	14.2	12.9
17. Belgium	4.5	6.6	9.2	9.9	10.2	2.5	6.9	2.7
18. Netherlands	6.6	7.2	10.3	10.5	11.4	2.6	1.4	7.3
19. Malaysia	4.0	5.0	8.2	8.5	9.6	39.0	3.9	9.2
20. Sweden	3.5	4.1	6.2	7.4	9.1	6.3	21.5	21.1
21. India	2.6	3.5	6.2	7.5	8.9	34.5	18.7	21.3
22. Japan	3.2	3.4	11.3	6.6	8.5	19.3	-40.1	34.8
23. Portugal	4.8	5.2	7.7	7.7	8.3	5.9	0.1	7.3
25. Croatia	1.3	2.8	6.8	7.5	7.9	-1.2	9.0	4.9
28. Poland	6.6	5.7	5.8	6.3	7.2	34.8	4.9	10.7
30. Russian Federation	4.3	3.4	5.2	5.6	7.6	16.1	6.1	30.0
34. Denmark	3.7	3.7	5.7	5.0	5.6	-2.1	-6.5	4.6
35. Ireland	2.2	2.6	4.4	4.7	5.3	3.7	9.2	10.2
38. Czech Republic	2.9	3.0	4.2	4.7	5.0	6.9	4.3	1.1
40. Hungary	3.0	3.8	4.0	4.15	4.2	-8.7	1.2	2.0
44. Norway	2.4	2.2	3.1	3.5	3.8	12.6	6.5	7.1
45. Luxembourg	1.7	1.8	3.7	3.6	3.6	11.1	-1.2	-0.8
46. Ukraine	0.2	0.4	2.6	3.1	3.5	..	22.1	11.5
<i>Other countries in Europe</i>								
Bulgaria	0.5	1.1	2.2	2.4	2.6	19.3	9.3	5.4
Cyprus	1.7	1.9	2.25	2.33	2.4	2.4	2.5	1.8
Finland	1.6	1.4	2.1	2.2	2.37	0.8	5.3	7.6
Slovenia	1.1	1.0	1.6	1.8	1.9	13.0	10.7	3.7
Slovakia	0.6	0.4	0.9	1.2	1.5	8.6	29.1	19.8
Romania	0.6	0.4	0.5	1.1	1.3	2.5	109.9	21.4
Lithuania	0.1	0.4	0.8	0.92	1.04	105	18.4	11.8
Estonia	0.4	0.5	0.9	0.95	1.03	21.0	6.7	7.2
Albania	0.1	0.4	0.7	0.86	1.01	26.7	18.3	16.3
Malta	0.7	0.6	0.8	0.76	0.76	2.1	-1.6	0.7
Bosnia & Herzegovina	..	0.2	0.52	0.57	0.59	16.8	6.3	13.7
Latvia	0.02	0.1	0.27	0.34	0.5	13.5	33.6	44.8
Iceland	0.2	0.23	0.37	0.41	0.44	6.3	1.3	20.7
Europe	209	228	330	347	374	17.4	5.1	7.7
World	405	474	633	678	735	10.2	7.1	8.4

Source: UNWTO World Tourism Barometer and Tourism Market Trends 2006 Edition

² According to the World Travel and Tourism Council (WTTTC), tourism directly supports 74 million jobs globally and about 215 million (8.1% of the world total) if indirect economic effects of the sector are taken into account.

3. At the same time, tourism is penetrating central and eastern European countries and legitimate expectations are growing on the part of both visitors and host communities. Although the region's performance in terms of tourism growth is very uneven, several countries (such as Croatia and the Czech Republic) already face major socio-economic pressures due to rapidly swelling visitor flows. Special thought should be given to promoting the development of *quality* tourism in these states and across all Europe so that tourism could make a substantial and lasting contribution to overall development. Lessons should be drawn from the experience of highly popular tourist destinations with regard to mass tourism, management skills and tourist services. Your Rapporteur will therefore argue in this report that a long-term vision and a holistic approach are necessary for Europe to lead the way not only as the most popular but also the most successful tourist destination.

4. In the framework of the preparation of this report, the Sub-Committee on Tourism Development (of the Committee on Economic Affairs and Development)³ held extensive consultations with senior representatives of European, national and regional tourism authorities³, as well as delegates of this Assembly's Committees on the Environment and on Culture, notably during its meeting in Almancil (Algarve region of Portugal, 17-18 May 2007). This was an excellent opportunity to gauge the importance of tourism to the development of regions not only in Portugal but also in many other European countries. In particular, the role of tourism in stimulating local infrastructure improvements and the preservation of employment in areas of rural decline or undergoing rural regeneration was stressed. Moreover, with globalisation regions are becoming rather autonomous actors and have to compete more actively. Sustainable development offers a forward looking approach that can help local communities to make the best of tourism and development.

II. Reconciling quantity and quality aspects through sustainable development of tourism

5. Tourism development can be a powerful drive in overall development and many European regions have a large untapped growth potential. However, this does not mean that 'business as usual' or unbridled expansion to become a mass tourism destination is a viable option. Many 'sun, sea and sand' tourism hotspots in Europe already find it increasingly difficult to keep their market shares as visitors become more demanding and new destinations spring up elsewhere in the world. Crowds of visitors and significant fluctuations in visitor flows throughout a year may cause a non-negligible stress to local communities and deplete local resources, thus undermining the structure on which tourism rests. As earlier Assembly reports have rightly pointed out, too much tourism can kill tourism. Moreover, unbalanced or chaotic tourism development is not compatible with a long-term development vision for any community. The responsibility of policy makers therefore is to ensure strong affirmative action in favour of sustainable development, including for tourism.

6. The very concept of sustainable development aims to reconcile quantity and quality aspects of growth, as growth per se is no longer seen as a panacea or an aim in itself. Since the 1992 Rio Declaration on Environment and Development setting out Agenda 21, there has been a growing public awareness and adherence to the principles of sustainable development that seeks to preserve the planet's capacity to support life in all its diversity. This embraces broad concerns for environmental protection, social equity, the quality of life, cultural diversity and, of course, a dynamic vibrant economy that brings prosperity for all.

i. Economic, environmental, social and cultural benchmarks for balanced tourism growth

7. Tourism can serve to enhance the quality of life of visitors and host communities alike; making it more sustainable will boost the sustainability and cohesion of European society. The World Tourism Organisation (UNWTO) and the United Nations Environment Programme (UNEP) identified twelve benchmarks for sustainable tourism as follows:

- **Economic viability** (tourism destinations and enterprises need to be viable and competitive in order to continue to prosper and yield benefits long-term);
- **Local prosperity** (tourism should contribute as much as possible to the prosperity of the host community, including a fair share of tourist-generated revenue);
- **Employment quality** (the number and quality of tourism-supported local jobs must be strengthened, including remuneration, skills and terms of employment);
- **Social equity** (economic and social benefits from tourism should be widely spread through the recipient community);

³ Including the Secretaries of State for Tourism of Croatia and Portugal, the World Tourism Organisation's Regional Representative for Europe, and a representative of Bavaria's Ministry of Economic Affairs, Infrastructure, Transport and Technology responsible for tourism.

- **Visitor fulfilment** (visitors should have a safe, satisfying and fulfilling experience);
- **Local control** (local communities need to be fully engaged and empowered in planning and decision making about the management and development of tourism in their area);
- **Community wellbeing** (quality of life in local communities should be preserved and strengthened, notably as regards social structures and access to resources, facilities and essential services);
- **Cultural richness** (cultural heritage and authentic traditions of host communities should be respected and preserved);
- **Physical integrity** (landscapes, both urban and rural, have to be preserved against physical and visual degradation);
- **Biological diversity** (natural areas, habitats and wildlife must be used in a way that minimises damage to them);
- **Resource efficiency** (scarce and non-renewable resources must be handled parsimoniously in tourism facilities);
- **Environmental purity** (air, water and land pollution, as well as waste generation, should be minimised).

8. In short, economic, social, environmental and cultural concerns need to guide sustainable tourism development policies. A full range of parameters, impacts and interactions between human activities and the environment should be taken into account for a balanced and integrated approach to tourism development and relevant action must be sustained over time. In this context, we wish to strongly recommend that all who care about this issue read the report of the Tourism Sustainability Group (set up by the EU Commission in 2004), *Action for more sustainable European tourism*, published in February 2007.

9. The report lists key challenges for the sustainability of European tourism (reducing the seasonality of demand, mitigating the impact of tourism transport, improving the quality of tourism jobs, enhancing community prosperity and quality of life in the face of change, minimising resource use and waste production, conserving and giving value to natural and cultural heritage, making holidays available to all, and using tourism as a tool in global sustainable development) and reviews stakeholder responsibilities for action to meet these challenges. The action framework of the report advocates networking between different players, efforts to promote certification schemes and corporate social responsibility, advisory support services for policy development, national pro-sustainability campaigns, research on good practice, sustainability training for managers, improved land use planning and control, and profiling better targeted information for tourists. These measures were agreed to underpin the Commission's position, as stated in its renewed Tourism Policy (adopted in 2006), in favour of "improving the competitiveness of the European tourism industry and creating more and better jobs through the sustainable growth of tourism in Europe and globally".

ii. Personal and collective security as a top challenge for the tourism sector

10. Tourism is a major contributor to peace, freedom and international understanding: it brings people and countries closer together. At the same time, safety and security are major prerequisites for tourism and development as modern travellers are ever better informed and more demanding. Tourism and travel are the first economic activities to suffer when personal and collective security is perceived as deficient. Health crises, natural disasters and acts of terrorism, as well as problems of personal, legal and criminal insecurity have rapid and lasting consequences on travel choices and by extension can seriously hurt the prosperity of communities strongly dependent on tourism. The aftermath of 9/11 and the 2005 Bali attacks, the Middle East and Asian tsunami crises or criminal outbreaks in individual countries – all this illustrates the powerful negative effects of the fear factor on tourism even if a rebound in activity may be rapid when calm returns.

11. Although Europe has a good reputation for safety, it is not immune to security threats. It needs to stay on its guard and to reflect on how security could further be upgraded at all levels in a discreet and acceptable way. Facing up to global, regional, national and local security challenges requires drawing lessons from past experiences. A quick look at some salient events of the last few years offers valuable insight. Due to fear of travelling and drastic security measures in the US after 9/11, visitor flows to the US in 2002-2003 shrank by at least 20% and revenues from tourism fell over 25%. Outbound trips by air went down significantly with scores of cancellations in corporate, personal and convention travel, and there ensued a chain of bankruptcies among travel-related businesses. The disruption hit many sectors most severely in the three months after the attacks and growth in the US tourism sector returned slowly only from 2004, reaching pre-2001 level of arrivals in 2006. Globally, in 2001, international arrivals fell by 0.5% and receipts were down by 2% (or US\$10 billion), while domestic tourism increased in all countries. The following year global tourism was back to growth with a 3% increase in international arrivals.

12. Then the US-led prolonged war in Iraq (beginning in March 2003) plunged the Middle East region into a security nightmare. A study by the World Travel and Tourism Council (WTTC) showed that this war threatened over 3 million tourism and travel related jobs and billions of dollars worth of economic value, including in the tourism sector. The combined impact with the SARS⁴ scare temporarily depressed global travel (although world trade and economy resisted well), with major losses incurred in China, Taiwan, Hong Kong, Canada⁵ and Singapore but spillovers also to European countries. To some extent, the Americans' travel intentions to Europe, especially France and Germany, were negatively affected by political disagreements over Iraq⁶ and the strengthening of the euro against the dollar.

13. Additional tensions currently stem from the pressure of the US Administration on the EU governments to accept new security measures for transatlantic travel⁷. This includes the supply of personal data on all passengers overflying but not landing in the US so as to allow them gain or retain visa-free travel to the US and the demand to put armed guards on all flights between Europe and the US by American airlines. The US Department of Homeland Security is also pressing for a new permit system for Europeans flying to the US, which would compel all potential passengers to apply online for permission to enter the US before even booking a ticket, with procedure lasting several days. Moreover, the US Administration is asking European airlines to provide personal data on non-travellers assisting elderly, young or ill passengers to board US-bound flights. This is in addition to 19 items of information on every traveller from the EU to the US that EU countries have already accepted to supply. Not surprisingly, EU officials have qualified the US demands as 'controversial', 'difficult', 'absurd', 'fully unjustified' and 'blackmail'. These somewhat excessive security demands by the US raise legal problems in Europe over data protection and risk complicating transatlantic travel. This Assembly and the Council of Europe must study the problem more closely with a view to seeking a common European position on the matter.

14. *Environmental security* came to the forefront with the December 2004 Asian tsunami which killed 225 000 people, including nearly two thousand European travellers⁸, and devastated infrastructure in eleven countries. Despite heavy initial psychological shock on the victims' families, activities in the region, with the help of the international community, recovered to normal rather rapidly and so did visitor flows since the disaster was viewed as a one-off event. Repeated hurricanes take deadly tolls and cause massive infrastructure damage in the Americas. In 2005, Hurricane Katrina, the worst natural disaster in the history of the United States, caused direct economic damage of over \$81 billion and huge environmental losses, especially in coastal areas, thus undercutting tourism in otherwise very frequented regions.

15. In summer 2007, Greek authorities were criticised over their efforts to deal with massive forest fires; entire villages and landscapes were ravaged⁹ and the local population, as well as visitors, had to desert them. In fact, forest fires particularly affect the Mediterranean countries where 380 000 to 1 million hectares of landscape burn every year, according to the European Forest Fire Information System. All these disasters highlight the importance of alert and crisis management systems (including evacuation plans) which are in need of urgent and substantive upgrades or complete restructuring in many countries. They also expose policy failures¹⁰ in the strategic management of the delicate balance between the built-up and green areas. Environmental experts warn that climatic disorders and ensuing disasters, such as storms, fires and floods, may be related to global warming and could thus hit more frequently in future.

16. Unfortunately, security crises come, go and come again: the travel and tourism sector therefore has to constantly adjust and develop ways to minimise these threats and their knock-on effects. Although governments bear primary responsibility for security in guiding various actors, international organisations also have a role to play, especially as regards communication and cooperation. As part of its work on enhancing safety and security in tourism, the UNWTO has sought to launch an international network featuring basic safety information and contact points on countries and emergencies. Currently, some information can be found on www.sos.travel,

⁴ According to the World Health Organisation's report of 21 April 2004, SARS (Severe Acute Respiratory Syndrome) killed 774 people out of 8096 known infected cases in the period from November 2002 to July 2003, mostly in south-east Asia.

⁵ Canada saw tourist arrivals in 2003 drop by 13% but recuperated 9% in the following year.

⁶ "The image of Europe in North America", a report of the Research Group of the European Travel Commission (representing national tourism organisations in 33 European countries), June 2004.

⁷ "Bush clampdown on flights to US" in *The Guardian*, 11 February 2008

⁸ 552 from Germany, 543 from Sweden, 179 from Finland, 150 Britons, 106 Swiss, 95 French, 86 Austrians, 84 Norwegians...

⁹ Damage to the Greek economy was estimated at up to € 4 billion.

¹⁰ This also includes criminal acts by unscrupulous developers seeking the reclassification of forests and wetlands for construction and financial speculation purposes.

accessible also via the UNWTO's website, but this network needs to be further developed and better furnished with country profiles. The British "Know Before You Go" travel safety campaign launched in 2001 and run by the Foreign and Commonwealth Office together with travel industry partners provides a wealth of valuable advice to travellers at www.fco.gov.uk/travel. Structured by risk-themes, countries and travel formalities, it is a highly recommended site for use by all English-speaking travellers and could be emulated by other countries in Europe.

17. Pan-European efforts for information exchange, surveillance, risk assessment, crisis management, response co-ordination and preventive action are paramount and hinge on effective cross-border cooperation, including through European and international institutions such as the Council of Europe. In the area of personal safety, national and sometimes individual responsibility is crucial. From the Council of Europe perspective, concerted and focused action to fight violence and extremism of all sorts should go hand in hand with the work to uphold human rights, ethical values and the rule of law. The Council of Europe anti-terrorist treaties, such as the Convention on the Prevention of Terrorism and the Convention on the Financing of Terrorism, but also efforts to ensure parliamentary oversight of security services pursue this goal and deserve full support by member states.

18. It is reassuring that safety standards in various domains are being developed, harmonised and ever more vigorously implemented in many European countries. It is particularly important that enhanced safety be ensured for public areas, gatherings and cultural events, tourist sites, facilities and services, as well as transport networks. One hundred percent security is hardly feasible but one hundred percent effort and care should be devoted to this end. We have to ensure that a multilingual Europe does not become a 'tower of Babel' when it comes to agreeing safety standards and moving from voluntary to binding safety arrangements, as is more or less the case regarding fire safety.

19. On the practical side, the Rapporteur wishes to recall proposals voiced at the Almancil meeting of the Assembly's Sub-Committee on Tourism Development regarding possible improvements in local arrangements for visitor safety. They refer to fundamental communication between visitors, host communities, public authorities and private sector enterprises. Thus region-specific security policies, regular and independent security audits, crisis management strategies, clearer sign-posting for tourists, better lighting of public areas and round-the-clock multilingual police service should be considered as priority measures and a vital and urgent public investment. Special tourism police forces trained to offer assistance in several languages successfully operate in Argentina, the Dominican Republic, Egypt, Greece, Malaysia and Mexico, while some countries run call centres with multilingual operators to handle emergencies which involve visitors.

iii. Defining "carrying capacity" of tourist sites, especially in protected areas and coastal zones

20. With new technologies, evolving consumption patterns and simplified travel planning, visitor flows are not only growing but also become less predictable and hence more difficult to cope with. Crowding and congestion – in transport, accommodation and tourist sites – are more and more frequent, causing the disappointment of visitors, increased business costs, disruption to the local community and often a degradation of tourist sites and services, as well as possibly reduced earnings. Managing tourist flows to optimise the use of facilities and resources requires proactive policy steps meant to define the carrying capacity of tourist sites and a set of measures and incentives designed to result in a more even spread of visitors – geographically and time-wise. This should be a prime task of tourism authorities and other stakeholders in mass tourism destinations.

21. Minimising the adverse effects of visitor flows requires an accurate assessment of the upper limits to the acceptable number of visitors and a subsequent monitoring of data on real visitor flows. We should distinguish between visitor and host destination perceptions of what is 'acceptable'. As it were, for certain places, such as landscapes of great natural beauty, sites with rich wildlife or places of worship, most visitors seek 'peace and quiet'; while for other places, for instance markets, festivals, sporting events or public squares, some crowding is expected and even desired. Local people might resent large and noisy traveller groups, especially when these outnumber the local population; local officials will get worried about the impact on traffic, infrastructure and public spaces; and local companies might lose control of their ability to meet excessive short-term demand. All these perceptions and expectations have to be weighed against potential benefits and threats in order to devise appropriate management solutions.

22. In practical terms, carrying capacity in tourism can be evaluated for the ecological, socio-cultural, psychological, infrastructural and management domains. It has been studied in a number of countries and proved very useful for subsequent policy adjustments, such as in the case of Malta where a carrying capacity

assessment and a resulting policy line have remained the cornerstone of the country's tourism strategy and are now used for the application of European Structural Funds to improve the quality of tourism facilities and the conservation of heritage. An alternative approach to manageable growth in tourism is expressed in the 'Limits of Acceptable Change' concept which is more flexible and is based on a real assessment of impacts of concern, but is also more permissive and reactive rather than proactive.

23. If all natural and cultural sites are precious tourism assets, then protected areas, unique monuments, islands and coastal zones can be likened to 'crown jewels' that have to be handled with special care. In fact, about 63% of holiday makers tend to choose coastal areas, compared with 25% who would choose mountains, cities or countryside. In some countries (Croatia, Greece and Cyprus) coastal tourism dominates the tourism offer and generates the majority of tourism spending. National strategies with regard to special treatment of vulnerable sites have to be adopted, allowing tourism to be incorporated in the picture via the integrated management of protected sites, enforcing stricter spatial planning controls and systematic impact assessment and promoting sustainable development principles across different sectors of human activity. As a source of practical advice we could recommend the know-how compiled in *Sustainable Tourism in Protected Areas: Guidelines for Planning and Management* published by the World Commission on Protected Areas (WCPA) together with the UNWTO and the UNEP. These guidelines promote a long-term vision with short and medium-term goals that seek to optimise economic benefits from tourism in protected areas while ensuring sufficient returns and incentives for conservation purposes.

24. Over 200 natural habitats in Europe are targeted for protection. Many of them are too fragile to be open to tourism but those that are have experienced rapid increases in visitor numbers in the last two decades. It is the primary responsibility of national authorities to determine, through appropriate legislation, the degree of protection sought and the extent of economic activities, including housing and tourism, permitted in protected areas. Research proves that site-specific environmental protection measures and regulations designed to discipline visitors and service providers do not constitute a constraint on tourism. For instance, Switzerland, where nearly 30% of the territory counts as protected areas, has environmental regulation that is among the toughest and most effective in the world but it also ranks as the most competitive country according to the global Travel and Tourism Competitiveness Index elaborated by the World Economic Forum (see the Appendix and <http://www.weforum.org/en/initiatives/gcp/TravelandTourismReport/index.htm> for more details on European countries).

25. Many countries in central and eastern Europe have highly attractive but underdeveloped natural and cultural resources which come increasingly under pressure from economic expansion. They need to secure sufficient funds, consistent regulations and unfailing enforcement in the effective protection of strategic natural and cultural sites, and their good use for tourism purposes. Illegal constructions¹¹ must be immediately stopped and removed, including when they are a consequence of unethical behaviour by some officials exercising oversight functions (the Rapporteur is aware of many such cases in Albania, Bulgaria, Lithuania, Poland, Romania, etc.).

iv. *Mass tourism – a threat and an opportunity?*

26. Mass tourism is often criticised and stereotyped as the extreme form of tourism. However we should recall that, in its early days, it was cherished for the multiple socio-economic benefits it brought to society at large and was perceived as a sign of the democratisation of travel and holidays. Clearly, the growth of tourism is a natural development as more people accede to higher living standards and can thus more easily afford to travel. This trend is welcome but it also creates new challenges for the tourism sector in order to avoid a suicidal expansion. It is precisely in mass tourism destinations that sustainable development strategies can make the most spectacular and sizeable contribution to progress.

27. We should bear in mind numerous examples in southern Europe where a critical level of development has been reached such as in many Spanish, Portuguese, Greek and Cypriot Mediterranean 'holiday clusters'. Torrevieja in Spain, for instance, had a stable population of 9200 inhabitants in 1960 which grew to 70 000 in 2001 and reaches about 400 000 in August with a peak of holiday-makers. Urban sprawl added some 90 000 buildings of which 75 000 are used exclusively as summer homes, leading to increased but fluctuating demand for employment, goods and services, as well as massive speculation in real estate and a huge pressure for new

¹¹ See also 4/2001 South-East Europe Review, pages 123-150, article on "Housing in south-eastern Europe: Between state and market" by Iván Tosics and József Hegedüs, with Michael Remmert; and the Council of Europe Development Bank and the World Bank study "Housing in South Eastern Europe" of March 2004.

construction. Additional income was used to enhance water systems and cultural services but scores of poor architectural quality buildings have radically transformed the local scenery. Local authorities are now looking into ways to promote more value-added investment that would foster competitiveness through quality, diversification and environmental sustainability. Determined to move from mass tourism to more high-end development, the Bulgarian Government has devised an ambitious investment strategy, worth € 3.3 billion, to improve transport infrastructure and waste treatment facilities – in partnership with the European Investment Bank and multiple public and private entities.

28. The World Tourism Organisation forecasts that most of the increase in European tourism receipts over the next decade will come from alternative forms of travel that do not involve standard 'sun, sand and sea' stays. Market surveys show that travellers are becoming more selective and searching for new experiences; they are more mobile and active, take shorter but more frequent holidays throughout the year, live longer and are increasingly concerned about the environment. Scenery, climate, cost, historical interest, environment, a complete change and gastronomic discovery are what motivate a modern traveller. Looking from an entrepreneurial position, this is an opportunity that calls for more diversified tourism offer but also a challenge because investment planning becomes more complex.

29. Even when local development relies exclusively on mass tourism, efforts to diversify the local economy should be made in order to attenuate problems linked with seasonal fluctuations in visitor flows and the related pressure on local resources, infrastructure and employment. This requires policy- and decision-making structures bringing together tourism, environment, community and national interests. Commitment to sustainability and a regulated quality-oriented approach should guide long-term infrastructure planning in particular: the potential impact of tourism growth on infrastructure should be studied and policy strategies should link tourism with overall development. The Rapporteur wishes, in this context, to underscore the importance of sustainable (re)construction, as described in the next section, and the need to pursue it more vigorously through affirmative action.

30. The low-cost flight boom has opened up new travelling opportunities but also created new problems for air traffic control and capacity management in transport and accommodation. The phenomenon of 'overbooking' that originally emerged in air travel is now spreading to the hotel sector, especially in popular urban and holiday destinations or during major public events. While adding extra capacity in hotels may prove difficult and economically irrational, local tourism authorities should explore options for 'emergency' accommodation and put in place customer help-lines. All officially licensed hotels must honour their booking commitments or provide adequate assistance and financial compensation to customers in cases where the original contract cannot be fulfilled.

v. *An integrated approach to congestion management and spatial planning*

31. Avoiding excessive and counterproductive concentrations of tourists requires early and well thought-out action. When permanent congestion occurs, it is a sign of failure in forward planning and the damage caused may be irreversible while fluctuating congestion may be slightly easier to tackle. However the market alone cannot solve the problem that needs a creative local approach and involvement of multiple actors from both the private and public sectors. The UNWTO's *Guidebook on Tourism Congestion Management at Natural and Cultural Sites* offers a most comprehensive and useful insight into the issue.

32. Permanent congestion occurs in tourist destinations and sites due to large and continuing levels of visitors. To alleviate the situation, major upgrades may be required on various aspects of the site itself and surrounding infrastructures. This includes access, parking and arrival areas, entry and ticketing, public spaces and viewing sites, interpretation and visitor facilities, as well as improvements in management, staff training, information flow and financial back-up.

33. Fluctuating congestion is mostly seen at well-marketed periodical events (such as school holidays, weekends, festivals, celebrations, sport competitions, etc.) that generate massive visitor flows within relatively short periods of the year. Although additional staff, transport, security, food, beverage, sanitary services and extended working hours are required occasionally, these are nonetheless critical to meeting the expectations of visitors and sustaining the attractiveness of sites. Temporary or permanent pricing incentives can be helpful as a means of regulating seasonal visitor flows if visitors can be informed early and holiday-taking outside the 'high season' should be encouraged. The hosting of the 2012 Olympic Games in London represents a huge investment, sustainable development and security challenge for both the local authorities and the private sector. It will also test the creativity of tourism officials in appealing to visitors with a view to luring them to come again to discover the country as a whole beyond Greater London.

34. A hotel performance study by Deloitte¹² shows that hotel occupancy rates in the major cities of Europe are improving but remain on average considerably lower than in other parts of the world. Hotel performance in other towns and especially in rural areas could be as low as 20%, essentially due to seasonality and geographical factors. The European Parliament report on the new European tourism policy (Rapporteur: Paolo Costa) also reiterated the need to implement a dedicated European tourism programme for retired people in low season which could improve the quality of life of senior citizens, job creation, demand management and prospects for economic growth.

Hotel performance by region

	Occupancy in %			Average Room Rate, US\$			Revenue per available room, US\$		
	2006	2007	Change	2006	2007	Change	2006	2007	Change
Europe	62.7	63.6	1.3	125	146	16.6	78	93	18.1
Middle East	71.1	72.9	2.5	140	156	12.1	99	114	14.8
Asia and the Pacific	71.2	71.7	0.7	120	134	11.9	85	96	12.7
Central and South America	67.1	68.0	1.3	104	111	13.2	69	80	14.7

35. Sustainable tourism development practices combining environmental, socio-cultural and economic parameters are applicable to all forms of tourism in all types of destinations, including mass tourism and niche segments. As a continuous process with constant monitoring of impacts and implementation of preventive or corrective measures, it constitutes a global tool for balanced development. Popular tourism destinations like the Russian Federation and Ukraine currently face hotel capacity constraints and need to invest urgently in quality accommodation.

36. Throughout Europe, especially countries of central and eastern Europe, rapid economic growth, urban development and real estate speculation have led to extreme pressures on landscape planning and often unsustainable construction decisions akin to architectural pollution. It is becoming urgent for local authorities to review policies with regard to the scale, density and design of new buildings. From a sustainable tourism point of view, traditional designs and local building materials should be used as much as possible so as to preserve authenticity and attractiveness of sites.

37. Moreover, there is growing public concern over the degradation of their living environment and the need for change in the direction of responsible consumption. The sustainable construction, use and management of buildings are especially important for our lifestyles in general and tourism in particular. As the 'polluter pays' principle is more systematically taken into account, "smart" buildings make increasingly more economic and environmental sense. A *sustainable construction* approach aims to adapt buildings to use low-environmental-impact materials and less energy, cause less pollution and less waste (with better heating, insulation, aeration, lighting and water systems), minimise running costs and optimise comfort and benefits to the community. While new buildings in Europe tend to be more efficient, the adjustment-renewal rate (at some 1% a year) of older ones is far too slow to expect massive improvements anytime soon – unless our governments put in place the right incentives towards that end.

38. European countries could also make better use of the European Landscape Convention¹³ (which came into force on 1 March 2004) designed to promote landscape protection, management and planning, and the organisation of European co-operation in this area. The Convention is the first international treaty to be exclusively concerned with all aspects of European landscape. It can also be used for enhancing rural heritage and facilitating the development of green tourism.

39. A number of popular European destinations are currently testing the European Eco Management and Audit Scheme to improve their land use planning. Some countries (Bulgaria, the United Kingdom, Italy, Spain and others) are experimenting with various eco-tax, congestion charging, differentiated payment, eco-certification and 'green grants' assistance schemes to influence consumption patterns and consumer choices. Moreover, Austria, Denmark, France, Italy, Latvia, Luxembourg, the Netherlands, Spain, Switzerland and the

¹² HotelBenchmark™ Survey by Deloitte.

¹³ More information on <http://www.coe.int/EuropeanLandscapeConvention>

Nordic countries are participating in the EU-funded VISIT initiative linking 12 eco-labelling schemes for tourism enterprises. Since 2002, sustainability reporting is mandatory for the largest companies in France and efforts are underway to implement the Tourism Quality Plan for improving tourism supply and marketing of tourism services. The Hungarian tourism authorities have introduced the national Tourism Quality Award – a voluntary system aiming to increase the quality of services and the competitiveness of the industry.

vi. Improving accessibility of tourist destinations, sites and facilities

40. The social dimension of tourism is a major factor for sustainable development as social inclusion and equity are important goals. Although holidays are a right thanks to a generalisation of paid leave, making holidays available to all is an important challenge - and opportunity - for the tourism sector. Expert studies show that about 40% of European citizens do not leave on holidays, mainly due to various forms of deprivation or disability (families, pensioners, immigrants, the young and people with disabilities are particularly concerned).

41. This implies a broader strategic aim for sustainable tourism: development policies seeking to maximise revenues from the sector with moderate or no increases in volume should go hand-in-hand with social inclusion principles. Moreover, greater attention to the social aspects of tourism could help reduce the seasonality of demand and excessive geographical concentrations of travellers, as well as support more stable year-round employment and the development of disadvantaged regions, especially if more travellers could be persuaded to travel outside the main season and/or the busiest areas. The “Bavaria in all seasons” campaign, for instance, pursues multiple objectives in seeking to support family travel, solidarity schemes sponsored by the public and private sectors, as well as resource efficiency, off-peak travel and the ‘rain or snow experience’ to visitors from extremely dry and hot countries.

42. For all people to have access to tourism, two important issues should be addressed: the physical accessibility of tourist destinations and sites and the economic affordability of travelling on holidays. A relevant priority action should therefore focus on better designed and adapted tourism facilities to meet the requirements of travellers with special needs (such as amenities for families with children, senior travellers and those with disabilities); improving the frequency, inter-modality and comfort of public transport links; encouraging price and tax incentives and related information for travel outside the high season and crowded destinations; pursuing policies to facilitate holiday-taking by people with low income, including through holiday voucher schemes (such as those run in France and Hungary) and other solidarity operations; and, importantly, aiming to earmark part of the income from tourism (via specific charges on tourists and tourism enterprises or voluntary arrangements) to tackle social issues.

vii. Tourism and climate change

43. Climate change is now widely recognised as a major global issue, with a series of implications for economic activities in general and more specifically tourism. Because climate and nature are essential resources for tourism, changing climate patterns and landscapes will inevitably have an impact on travel choices, tourism businesses and host societies, including significant side effects on related sectors (such as agriculture, crafts, construction, etc.) as well as on public health. The phenomenon cannot be considered as a distant occurrence as it already affects the sector, notably certain destinations, for instance mountain, island and coastal regions. In the longer term, changing climate patterns¹⁴ might considerably alter major tourism flows, notably in northern Europe and the Mediterranean.

44. The UNWTO estimates that tourism contributes about 5% of global man-made greenhouse gas emissions, essentially through transport (90% share of the total contribution). With the explosion of low-cost air travel¹⁵ in recent years, some 43% of travellers world-wide use air transport. This trend is amplifying and air travel remains one of the fastest growing sources of emissions (up by 4% a year). We should also note that 44% of travellers use road transport but road use is growing on average more slowly than air travel, respectively by 2.3% and 3.3% each year. It is hoped that a recently signed US-EU ‘open skies’ agreement will improve transatlantic air traffic while the arrival on the market of new generation aircraft – the Airbus A380 and Boeing 787 Dreamliner – will generate less pollution and noise due to higher fuel efficiency, multiple technological improvements, higher capacity and lighter weight.

¹⁴ By 2100, temperatures world-wide could rise by up to 5.8 degrees and the sea level could go up by 88 centimetres, while the frequency of exceptional climatic events such as storms, floods, droughts and fires would also increase.

¹⁵ Currently there are 62 low-cost airlines in Europe. Most of them sell their tickets directly via the Internet or the phone and are not available via travel agents.

45. With the liberalisation of European air policies in the 1990s, low-cost airlines brought a near-revolution in travel by putting cheap flights and multiple destinations within reach of most holiday makers or even job seekers. Peripheral locations in Europe have thus become more or less popular tourism destinations, yielding new prosperity to local communities and more variety to travellers. Low-cost companies now carry over 100 million passengers a year and account for a third of all flights. Lately, their expansion has been particularly strong in eastern Europe where cities like Prague, Sofia, Vilnius and Warsaw have opened new terminals to cope with the soaring passenger flows. It is estimated that every additional million travellers in the air generates some 3000 jobs on the ground. However the large flows of state subsidies needed to prop up secondary airports could be questioned from the point of view of fair competition.

46. Moreover, busier skies in Europe also mean more noise for local inhabitants and, according to the 'green' parties, more pollution. Luckily, the security of flying in Europe is not yet affected by soaring air traffic but air control capacity problems may soon appear. The apparent cheapness of low cost flights can be challenged on the basis of the 'polluter pays' principle: so far, European airlines have been exempt from the 'carbon tax' through the EU emissions trading scheme and have no obvious incentive to lower their greenhouse emissions. Factoring all the relevant environmental costs into air travel prices could well mean that many low cost operators might run out of business and generate negative reactions down the chain in the localities that rely heavily on low-cost travel for their development. The real cost of no-frills travel should be weighed against the tangible benefits to medium-term local development.

47. The sustainable tourism concept translates long-term environmental and development concerns into policy objectives aimed at concerted action on the part of national authorities but also competent international institutions. The main challenges include the need to:

- involve tourism in the implementation of existing commitments under the UN Framework Convention on Climate Change (UNFCCC) with its Kyoto Protocol and contribute to the preparation of the new package of measures for the post-2012 period;
- mitigate the impact of long-haul travel and transport emissions (In Europe, tourism transport currently accounts for about 8% of CO₂-equivalent emissions, with air transport generating half of that amount and cars about 41% of those emissions), not least through a 'polluter pays' principle and a greater participation of European airlines in the EU Emissions Trading System;
- encourage responsible consumption and production patterns minimising resource waste (tourists tend to use several times more water than local inhabitants) and pollution (especially as regards water and energy use, recycling, waste management, forward planning, etc.) and propagating meaningful alternatives (such as greater recourse to renewable resources, public transport, sustainable construction, etc.) in providing tourism services, notably accommodation;
- support the implementation of international co-development policies, including the Millennium Development Goals, environmental agreements, the UNWTO's Global Code of Ethics for Tourism, the Clean Development Mechanism, multilateral and bilateral aid programmes, as Europe has a moral duty to assist the emerging economies to match their development needs and the drive for more tourism;
- promoting the sharing of knowledge and good practice on sustainable tourism development with other countries and regions.

48. Just as the problem transcends the borders of different human activities, practical solutions will require cross-sector action plans and sector-specific action programmes. Today's politicians have a key responsibility for developing and implementing strategies to attenuate future disorders due to climate change. Part of the answer could come also through a greater attention to promoting domestic¹⁶ – intra-country and intra-European – tourism whereby distances travelled are shorter and means used can rely more on public transport. Regional tourism promotion schemes, such as "the theme beats the destination" in Bavaria or the "European Destinations of Excellence" (EDEN) pilot project of the European Commission, reflect the willingness to combine proximity tourism with quality and sustainability.

viii. The role of public-private partnerships in promoting sustainable tourism

49. If state authorities and international institutions are primarily responsible for providing political commitment and policies conducive to sustainability in tourism, the contribution of the private sector is critical to the achievement of results on the ground and providing feedback to policy makers. Public and private actors

¹⁶ According to OECD study (Tourism in OECD countries 2008: trends and policies), domestic – intra-country – visits represent 80% of tourism business in the UK and nearly 85% in Germany.

should work together to agree, implement and monitor the integrated quality management approach respectful of reference standards and quality labels for tourism services and products. Whilst tourism and sectoral associations can act as relays of information between state authorities and local actors, public-private partnerships might be considered for the realisation of pilot projects, the promotion of corporate social responsibility and the development of equitable employment schemes, improved pricing models and investment planning compatible with environmental and social imperatives.

50. Research shows that there are many cases where large investments in tourism infrastructure and marketing have not translated into desired and sustainable growth. The key finding is that most difficulties stem from the shortcomings in collaboration of the public and private sectors in identifying target population groups and tailoring effective communication to reach them. It is therefore particularly important to use the synergies of public and private institutions for innovative destination marketing. Turkey, Croatia and the Czech Republic are among the countries that have succeeded very well in this respect. OECD research shows that tourism is increasingly seen as a sector in which public investment can be particularly relevant, such as for infrastructure development, SME support, programmes underpinning quality improvements in tourism facilities and services, and licensing schemes for tourism professionals.

ix. Hospitality: the importance of skills and communication

51. Tourism is first and foremost about people of all ages, interests and skills. For some it means job opportunities and sustainable livelihoods, for others it represents contacts, cultural exchanges, learning experience or recreation. As a customer-minded service industry, it is increasingly subject to global and local competition pressures and labour mobility that call for enhanced attention to competences and added value orientation. To put it simply, when we travel, we want to feel welcome wherever we go; we count on quality experience and hospitality to match our expectations.

52. Quality services require good infrastructure but especially dedicated and competent people involved in tourism as hosts, be they local inhabitants or tourism professionals. Hospitality needs a smiling and caring attitude and, inevitably, some linguistic skills. The latter is becoming a particularly relevant professional requirement for many jobs and careers. Hospitality could be included in school curricula already at primary level and tourism should be viewed as a means of providing essential learning experience. Facilities for language teaching should be provided and promoted to meet the needs of people of different ages, backgrounds and interests. Public support schemes, such as the 'language-cheque' system successfully used in Belgium, may prove helpful in underpinning both language learning and employability. Tourism companies, sites and facilities should seek appropriate levels of staff qualification and training, including on sustainability issues. Motivating staff to perform at their best implies also an effort on the part of employers to provide good employment conditions, including sufficient salary levels, social security provision, long-term contracts, flexible but consistent working hours and career development.

53. The spread of the low-cost phenomenon has affected not only tourism-related travel and accommodation but also jobs. Downward pressure on remuneration and working conditions in the tourism sector is leading to situations where, despite higher demand, tourism companies find it increasingly difficult to recruit suitably qualified staff. Quality tourism requires quality staff, and human resources are not just a cost but also a vital investment. Your Rapporteur believes that tourism authorities and professionals should bear this important consideration in mind when adjusting their strategic development plans. We should seek *not more but better* tourism.

54. Stringent security requirements at visitor arrival points should not serve as an excuse for failures in hospitality and welcome, as has been the case for a number of years in the United States after the 9/11 events. Visitor flows and income from tourism fell not only because of the fear of flying which was short-lived; an unsmiling attitude of immigration officials caused lasting damages to US-bound tourism. Whereas people-to-people contacts generated through travelling are one of the best marketing and diplomacy tools, the recent Visit USA programme consisting of promotion committees in selected countries (UK, Canada, Mexico, Germany and Japan) and a website (currently under development) is a surprisingly meagre effort to win the hearts and minds of the people around the world. This gives some food for thought also to European countries, especially in eastern Europe, that could unleash their largely untapped potential for tourism development with a caring attitude. Russia, for instance, could become one of the world's leading tourism economies over the next decade, according to the WTTC,- provided the country modernises its infrastructures, hospitality services and human resource management.

III. Promoting diversity, authenticity and quality in tourism as a key to long-term success

i. Lessons to be learned from national successes and failures

55. We have seen that tourism has considerable power to influence the identity and prosperity of the areas where it unfolds. Such changes affect both established European tourism destinations and emerging ones, with the advantage for the latter that they are able to draw lessons from the former in order to avoid or at least minimise mistakes. Multiple development pressures stem from evolving lifestyles, economic growth and restructuring, demographic trends and globalisation. They call for measured national, regional and local but also collective – pan-European – responses.

56. The rise of tourism as a principle economic activity for vast areas and regions in Europe involves ever more people and makes the well-planned development of tourism a precondition for its lasting success. The economic, social, cultural and environmental pillars of tourism fit together through sustainable development whereby they become mutually reinforcing. Any excess, especially in economic expansion, risks exacerbating the cost of tourism to society at large and ultimately undermining the benefits. We should view sustainability as a means of improving the competitiveness of the tourism sector and a source of quality growth.

57. The Spanish example is often cited to illustrate the excesses caused by mass tourism in coastal areas. In the last decades, many coastal strips have thus experienced rapid urbanisation often associated with overexploitation of land space and resources, visual pollution and disturbed social balance. Similar examples can be found in Italy and other Mediterranean countries while many other resort areas in Europe (including urban destinations and mountain areas) are increasingly confronted with massive visitor inflows, poorly managed spatial planning and the related consequences.

58. Luckily, it is also in Spain that we have some good examples of how tourism-related socio-economic and environmental decline can be reversed. For instance, in Calvià, a major coastal resort area of Mallorca Island, local authorities undertook a major policy shift in the mid-1990s towards a more balanced tourism model based on restoration, contained growth and sustainability. Their action programme centred on spatial planning, quality infrastructure and services, cultural and natural heritage, resource management review and investment. The quality of life of local people was put forward as an overarching objective resulting in a win-win situation for both visitors and host community.

59. Another interesting case comes from Croatia, whose tourism policies were discussed by the members of our Sub-Committee on Tourism Development with Croatia's Secretary of State for Tourism in May 2007. This country has seen a rapid resurgence of tourism since the end of the war that followed independence. Tourism now accounts for 23% of GDP and is essentially concentrated in coastal zones. Confronted with a major challenge of urbanisation on the coast, driven by a booming real estate market, Croatia opted for sustainability in its tourism strategy with emphasis on value rather than volume. Strict spatial and investment planning regulations were introduced in 2004 for zones within one kilometre of the coast, 300 metres offshore and all islands. Scores of illegal construction sites were demolished, existing ports, facilities and camp sites were modernised, water management systems were upgraded and the state-sponsored programme 'new life for old buildings' assisted the creation of family-run heritage hotels, reducing the environmental impact and improving services offered to visitors. "The Mediterranean as it once was" – the logo chosen – illustrates well the aspiration to excel. Further attention is now given to the conversion of underdeveloped regions and abandoned industrial sites into high-value tourism destinations.

60. The dynamism of tourism is not hurt but rather stimulated by policy indications to orient investors. The aim being to optimise benefits for visitors, host communities and entrepreneurs, all stakeholders need to show a responsible attitude and behaviour. We see a major challenge for tourist authorities across Europe to ensure that sustainability- and quality-oriented strategies for tourism policy, especially as regards spatial development and demand management (seasonality), are in place and duly implemented at national, regional and local levels. Changes stemming from globalisation should be accommodated in a way that responds to the need for restructuring in local economies as a result of decline of certain activities (notably heavy industries and farming) whereas properly managed tourism can provide a healthy alternative source of local income and jobs.

61. Respect for cultural diversity is a key principle of sustainable development and an important opportunity for the tourism sector. As well as providing a source of inspiration for visitors and income to host communities, cultural tourism can serve as a major force for the conservation and rehabilitation of the historic and cultural heritage, underpin artistic events (theatre, music, dance, exhibitions, artists' villages, etc.), stimulate local crafts and folklore, promote local traditions (including gastronomic and spiritual experiences) and foster an attachment

to fundamental cultural values. More than 200 cultural settings across Europe feature as UNESCO World Heritage Sites.

62. Local and regional authorities should seek to safeguard the authenticity of local cultural distinctions in the way these are presented to visitors and to protect cultural sites against any “collateral damage” due to visitor pressure. A fair share of direct and indirect income generated from tourist visits should be channelled towards the further development and interpretation of cultural assets. We should also stress, in this context, the importance of many ‘cultural routes’ launched in various countries on the Council of Europe’s initiative, as well as the designation of ‘cultural capitals’¹⁷ under EU auspices.

63. Moreover, regional cooperation in running joint and targeted tourism promotion campaigns for overseas markets is an effective, rational and commendable course of action. Some examples of this include the joint marketing effort of the Czech Republic, Hungary, Slovakia and Poland vis-à-vis China, Japan, the USA and other countries under the slogan “European Quartet, one melody” (see www.european-quartet.com for more information on this initiative). In October 2007, Portugal and Spain launched an integrated cooperation programme to promote the Iberian Peninsula as “a must see destination” in Europe (see www.portugalspainboth.com), insisting on two distinct cultures in one. There is also the Scandinavian Tourist Board promoting Denmark, Norway and Sweden in the Asia-Pacific region and the Scandinavia official website (www.goscandinavia.com) as a gateway to Denmark, Finland, Iceland, Norway and Sweden aimed at North American travellers.

ii. Regulatory tools, policies, cross-sector coordination and monitoring

64. Once the vision and strategic orientations for tourism are defined, important choices have to be made to reflect, via regulatory tools, the level and nature of tourism sought and local specificities. Key reference tools for influencing tourism development are: land use planning and development control through formal regulations (covering physical benchmarks and impact evaluation) and less formal guidelines (including on ethical aspects for tourism authorities, companies and tourists); economic instruments (such as tax incentives and charges, marketing options and certification requirements); capacity building to assist smaller communities and enterprises (sharing experience, knowledge and good practice could be particularly helpful); targeted infrastructure improvements; and continuous monitoring of trends. Effective communication and information services are crucial to ensure broad public awareness and acceptance of sustainability-oriented regulations.

65. The search for sustainability in tourism would be meaningless without an objective assessment of whether its underlying principles are being respected. Measuring progress is essential and should rely on the use of measurable sustainability indicators. Such ‘accountability’ can be used to analyse the current state of affairs (e.g. occupancy rates, tourist satisfaction), stresses on the system (e.g. water shortages, crime levels, site rehabilitation needs), the impact of tourism (e.g. variations in income levels, resource allocation and community wellbeing) and management effort (e.g. pollution changes, quality of jobs). Baseline sustainability indicators should be agreed in consultation with stakeholders from various sectors so as to allow for valid cross-sector comparisons and co-ordination.

66. There are also several aspects of tourism development that should be subject to obligatory controls. They concern the minimum requirements for the protection of the environment, communities, visitors and businesses. We wish to single out location-specific development regulations, rights and conditions for employees, rights of access to services and infrastructures, visitor health and safety (notably food hygiene and fire safety), fair trading practices, serious environmental impact (including pollution, noise, waste and resource abuse) and ethical misconduct by visitors or hosts (such as child prostitution). Because these concerns are of universal character, they should be covered by a basic legal framework in all countries and should apply to all forms of tourism.

67. The body of legislation relating to sustainability in tourism is thus quite considerable and it would not be feasible, nor desirable, to consolidate it all in a single law. However, a supportive national tourism law with cross-references to other relevant laws is necessary. It should underpin the long-term strategy for sustainable tourism development and enable due controls, co-ordination and compliance. In some countries, establishing priority development zones may prove useful for promoting tourism in protected areas or underdeveloped

¹⁷ Future European Capitals of Culture include Linz (Austria) and Vilnius (Lithuania) in 2009; Istanbul (Turkey), Pécs (Hungary) and Essen (Germany) in 2010; Turku (Finland) and Tallinn (Estonia) in 2011; Guimarães (Portugal) and Maribor (Slovenia) in 2012. Stavanger and Sandnes (Norway) and Liverpool (United Kingdom) are Capitals of Culture in 2008.

regions. This practice is now being tested in the Russian Federation to stimulate tourism development in the Siberian part of the country, notably the Baikal region and the Far East.

iii. Political responsibilities for development options

68. Wisely managed tourism enriches society in many different ways. It can stimulate the business environment, competitiveness, innovation and investment, thus becoming a gateway to accelerated overall development. Placing sustainability at the centre of tourism development is now widely recognised as the right way towards fully realising the potential of the tourism sector and a key to its long-term success. National authorities have an important role to play in promoting sustainable development in general and that of tourism in particular¹⁸. To this end, political will, policy coherence and technical competence are necessary at all levels of government. Moreover, governments should work together and facilitate joint approaches whenever possible in order to tackle transboundary, regional and global challenges of sustainability. This is a major field of action for competent international organisations, including the Council of Europe.

69. As the World Tourism Organisation rightly points out in its Guide for policy makers¹⁹, sustainability is the responsibility of all those involved in tourism, but governments should lead the process if substantial progress is to be achieved. Parliaments similarly can assist, primarily at national and local levels, in providing a legal environment that orients the private sector, tourists and other stakeholders and fosters their response to sustainability issues. Your Rapporteur hopes that this report will have contributed to demonstrating that a holistic approach to tourism development should be sought, and how various public policies may affect or be affected by tourism.

¹⁸ Very few countries have dedicated tourism ministries (such as in Croatia, Greece and Mexico) or departments (Italy). Tourism matters are in most cases attached to economy, industry, trade or SME ministries (for instance in Armenia, Austria, Bosnia and Herzegovina, Bulgaria, Canada, Cyprus, Denmark, Estonia, Finland, France, Georgia, Germany, Lithuania, the Netherlands, Norway, Portugal, Romania, the Russian Federation, Slovakia, Slovenia, Spain, Sweden, Switzerland and the United States). In some countries, the tourism portfolio is linked to regional development (Czech Republic, Hungary and Latvia), culture and sports (Albania, Andorra, Azerbaijan, Ireland, Malta, Poland, Turkey, Ukraine and the United Kingdom), environment (South Africa), foreign affairs (Iceland) or transportation and communications (Japan and China).

¹⁹ Making Tourism More Sustainable: a Guide for Policy Makers

Appendix

Global Travel and Tourism Competitiveness Index (extracts)

Based on the evaluation of 13 factors (Policy rules and regulations; Environmental regulation; Safety and security; Health and hygiene; Prioritization of travel and tourism; Air transport infrastructure; Ground transport infrastructure; Tourism infrastructure; ICT infrastructure; Price competitiveness in the travel and tourism sector; Human resources; National tourism perception; Natural and cultural resources) in 124 countries

	Overall Index		Regulatory Framework		Business environment and infrastructure		Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	5.66	2	5.8	2	5.36	2	5.81
Austria	2	5.54	3	5.79	12	4.97	1	5.86
Germany	3	5.48	6	5.62	3	5.23	6	5.61
Iceland	4	5.45	5	5.69	8	5.04	5	5.61
United States	5	5.43	33	5.06	1	5.74	12	5.50
Hong Kong (China)	6	5.33	4	5.75	14	4.81	14	5.44
Canada	7	5.31	15	5.31	4	5.22	16	5.40
Singapore	8	5.31	1	5.81	11	5.01	42	5.11
Luxembourg	9	5.31	17	5.28	9	5.04	8	5.60
United Kingdom	10	5.28	21	5.20	6	5.08	10	5.58
Denmark	11	5.27	8	5.46	16	4.76	9	5.59
France	12	5.23	13	5.34	5	5.10	28	5.27
Australia	13	5.21	16	5.28	10	5.04	26	5.30
New Zealand	14	5.20	10	5.44	20	4.57	7	5.60
Spain	15	5.18	25	5.15	7	5.05	19	5.34
Finland	16	5.16	7	5.61	18	4.68	33	5.18
Sweden	17	5.13	19	5.25	13	4.88	27	5.27
United Arab Emirates	18	5.09	18	5.28	19	4.68	24	5.31
Netherlands	19	5.08	22	5.17	15	4.77	25	5.30
Cyprus	20	5.07	29	5.09	23	4.50	3	5.62
Belgium	21	5.07	24	5.16	29	4.41	4	5.62
Portugal	22	5.05	11	5.40	22	4.50	30	5.23
Norway	23	5.04	9	5.45	21	4.56	40	5.12
Greece	24	4.99	20	5.21	32	4.36	15	5.41
Japan	25	4.99	28	5.10	17	4.71	38	5.15
Malta	26	4.96	23	5.16	31	4.37	21	5.33
Ireland	27	4.93	14	5.32	26	4.44	46	5.03
Estonia	28	4.90	32	5.07	25	4.45	34	5.18
Italy	33	4.78	42	4.77	30	4.38	32	5.18
Czech Republic	35	4.75	40	4.80	37	4.13	22	5.32
Slovakia	37	4.68	37	4.86	45	3.81	18	5.37
Croatia	38	4.66	58	4.37	40	4.06	11	5.55
Hungary	40	4.61	26	5.15	51	3.71	51	4.98
Slovenia	44	4.58	44	4.74	38	4.11	53	4.88
Lithuania	51	4.34	57	4.39	43	3.84	61	4.79
Turkey	52	4.32	53	4.45	63	3.49	48	5.00
Latvia	53	4.31	60	4.32	41	4.00	77	4.63
Bulgaria	54	4.31	66	4.17	56	3.64	41	5.11
Serbia & Montenegro	61	4.18	79	3.99	80	3.09	13	5.47
Poland	63	4.18	63	4.22	62	3.50	60	4.81
Georgia	66	4.13	55	4.44	98	2.77	31	5.18
Russian Federation	68	4.03	100	3.64	49	3.75	65	4.71
Armenia	74	3.93	65	4.21	96	2.80	62	4.77
Azerbaijan	75	3.92	77	4.01	70	3.29	88	4.45
Romania	76	3.91	87	3.86	74	3.20	71	4.68
Ukraine	78	3.89	76	4.01	73	3.21	89	4.45
former Yugoslav Republic of Macedonia	83	3.81	114	3.34	82	3.01	44	5.07
Albania	90	3.75	94	3.70	114	2.49	43	5.07
Moldova	95	3.65	99	3.65	100	2.75	83	4.54
Bosnia & Herzegovina	104	3.51	101	3.59	94	2.82	108	4.14

Source: World Economic Forum, The Travel & Tourism Competitiveness Report 2007

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Members of the Committee:

N.B. The names of the members who took part in the meeting **are printed in bold**.

Secretariat of the committee: Mr Newman, Ms Ramanauskaite and Mr de Buyer.