Sustainable Tourism Development in the Baltic Sea Region

Testing sustainability in tourism projects:

Development of the agora Sustainability Check

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Wolfgang Günther
Bente Grimm
Karen Winkler

Overview

Content:	Development of the agora Sustainability Check for testing the sustainability in tourism projects
Client:	Prof. Dr. Wilhelm Steingrube Ernst-Moritz-Arndt Universität Greifswald Institut für Geografie Makarenkostraße 22 D-17487 Greifswald
Concept and development:	Institute for Tourism Research in Northern Europe, Kiel Wolfgang Günther, Bente Grimm, Karen Winkler
Developed in cooperation with:	Baltic Chamber of Commerce Association (BCCA) Coalition Clean Baltic (CCB) Social Hansa
Support:	This project is approved as a Baltic 21 Lighthouse project and part-financed by the European Union through the Interreg III B programme
Status:	February 2007

Development of the agora Sustainability Check

The agora project aims to enhance the sustainable development of tourism throughout the Baltic Sea Region, mainly by spreading information on tourism projects and initiatives throughout the region. The project is supported by Baltic21 and partly financed by the EU Community Initiative INTERREG IIIB (Baltic Sea Region). For further information about the agora project, the Baltic21 and INTERREG IIIB programme, see www.agora-tourism.net, www.baltic21.org and www.bsrinterreg.net.

The agora Sustainability Check is part of the agora work package 2.1 whose aim is - among others - to provide a tool for assessing the sustainability of tourism projects submitted for evaluation to organisations or programmes providing grants. The aim of the Sustainability Check is:

► to stimulate/encourage to develop (more) sustainable tourism projects,

► to avoid the granting of projects with negative impacts on society, environment and/or economy,

► to stem the arbitrary off the term 'sustainability',

► to serve as guidance for the search after best practices.

Within the agora project, the development of the Sustainability Check is the responsibility of the agora Sustainability Check Advisory Board which consists of representatives of three international networks standing for the three dimensions of sustainability:

► Baltic Chamber of Commerce Association (BCCA), Michael Zeinert, Björn Ipsen

► Coalition Clean Baltic (CCB), Jörg Schmiedel

► Social Hansa, Marion Woitschik

The Advisory Board receives assistance from the agora Toolbox (work package 2.2). To assure the manual's practicality, several steps are necessary to complete the final version (see Fig. 1). Details about each step are provided in the remainder of this document.

Fig. 1: The Sustainability Check (revised timetable)

Step	Procedure	Time period
I	**Inventory of existing tools** for testing sustainability in tourism and presentation of the results to the advisory board	Oct 2005 - Dec 2005
II	**Draft version of testing tool** based on inventory and requirements prepared by the advisory board (terms of reference)	Jan 2006 - Apr 2006
III	Small changes and feedback to the agora-network[1]	Apr 2006 - May 2006
IV	**Completion of preliminary testing tool**	May 2006 - Oct 2006
V	**Field tests** within the agora pilot projects (work package 3)	Oct 2006 - Dec 2006
VI	Integration of gained knowledge in consultation with advisory board and **finalisation of tool**	Jan 2007 - Aug 2007
VII	**Communication** (e.g. to policy)	Sep 2007 - Dec 2007

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[1] Mecklenburg-Vorpommern: use in case-study

Step I

During the first meeting for the agora Sustainability Check, the Advisory Board asked the agora Toolbox to provide them with an overview of existing check tools for sustainability in tourism. This compilation of existing guidelines and indicators was supplied in the 'State of the Art' report of the Sustainability Check[2]. This report was subsequently discussed with the Advisory Board and served as a basis for defining the terms of reference for the Sustainability Check.

The Sustainability Check Advisory Board agreed that the Sustainability Check should fulfil the following **general requirements**:
► It should illustrate what should be considered in assessing the sustainability of a project
► With little effort, flexible application
► Valid for the entire Baltic Sea region
► Transparent and easily comprehensible
► With equal consideration for ecology, economy and social issues
► Stimulating and not unnecessarily constricting
► Can be combined with already existing funding guidelines
► Internet availability and usability
  ▪ including introduction and explanations
  ▪ including evaluation tool
► Use for planning +/ implementation +/ final evaluation
► Application possibilities in different areas
► Input for reporting duty

The **form** of the agora sustainability check should fulfil the following requirements:
► Checklist with clear and unambiguous guidelines
► Where possible and reasonable: indicators
► Short explanations with practical examples
► Possibly multi-level, i.e. requirements may only be fulfilled to a certain extent and not fully, and/or point system
► Modular composition
► No fixed default values, i.e. no exclusion criteria or requirements for when a project is sustainable or not

The Sustainability Check shall be used for projects that focus on the support or implementation of sustainable tourism. These can be:
► Projects supported by EU programs like INTERREG (as e.g. agora), LIFE, LEADER+
► Projects supported by national and regional public/private funds or organisations.

Examples of possible projects include new or further development of public and private tourism infrastructure, product development, co-operations, concepts or marketing.

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[2] Günther, W., Winkler, K. and Zahl, B. (2005): Sustainability Check (WP 2.1): Testing sustainability in tourism projects: State of the Art (download at www.agora-tourism.net)

The Advisory Board defined the term 'tourism project' as a plan to achieve a defined goal within a defined time span. Furthermore, the Sustainability Check is based on the Baltic21 definition of sustainable development and the definition of sustainable tourism by the European Commission; these definitions can be found in the document 'Implementation Manual' (available at www.agora-tourism.net).

Step II

In this second step, the *N.I.T.* (on behalf of the agora Toolbox) developed a draft check list according to the adopted terms of reference. The content of the draft checklist is mainly based on the compilation of existing guidelines and indicators illustrated in the 'State of the Art' report of the Sustainability Check[3].

Furthermore, the checklist is structured along nine objectives that were used by the partners of the INVENT project to assess the sustainability of marketing strategies and tourist products (see Fig 2)[4]. This first draft version of the checklist was also tested by several practioners in order to make the tool as user-friendly as possible.

Fig. 2: Main objectives of sustainability[5]

Economy	Society	Environment
(1) Strengthen local/regional economic structure	(4) Satisfaction of most stakeholders impacted by project	(7) Minimise resource use
(2) Employment of local people	(5) Participation of local people in decisions	(8) Reduce environmental load
(3) Sustainable capacity planning	(6) Respect for local/regional culture	(9) Preserve biodiversity

The draft checklist contains 27 questions to be answered for the assessment:

      1 to 5 questions on selected aspects for each objective
plus   involvement of professional expertise for each dimension.

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[3] Günther, W., Winkler, K. and Zahl, B. (2005): Sustainability Check (WP 2.1): Testing sustainability in tourism projects: State of the Art (download at www.agora-tourism.net)

[4] For further information about the INVENT project see also Günther, W. & Zahl, B. (2005): Sustainable Tourism Development in the Baltic Sea Region. An overview of market research activities and education for sustainable tourism (available at www.agora-tourism.net)

[5] Source: INVENT (2005) Traumziel Nachhaltigkeit. Innovative Vermarktungskonzepte nachhaltiger Tourismusangebote für den Massenmarkt, p. 7 (translated and slightly adapted).

Steps III to V

Next, the draft Sustainability Check was communicated within the agora network to benefit from the wide span of experiences of the various agora partners. Many comments and recommendations were collected by phone or mail and in particular during the 2nd agora project meeting on June 14 and 15, 2006 in Jurmala, Latvia.

The updated 2nd draft of Sustainability Check was then presented to the agora pilot projects at the 3rd agora meeting (October 2006 in Lithuania). This was done in order to prepare the participants for the field test of the Sustainability Check. More feedback on the draft document was gained at this meeting, so that a newly updated 3rd version was sent out afterwards. This was then used to run the field test with the agora pilot projects from October to December 2006.

As a further result of the 3rd agora meeting, the agora Strategy Factory (WP 2.3) adopted the twelve aims for sustainable tourism developed by the World Tourism Organisation and the United Nations Environment Programme (see Fig. 3 on the next page). As these aims overlap with the objectives chosen for the Sustainability Check (see Fig. 2) to a very large extent, it was decided to adopt these twelve aims for the Sustainability Check as well. Nevertheless, the Sustainability Check will remain structured according to its present nine objectives as the close agreement between the different sets of aims and objectives allows for this.

Step VI

As a result of the field test, a 4th version of the Sustainability Check was produced. This version incorporated all the feedback gained from the field test and was discussed with the Sustainability Check Advisory Board in February 2007. Afterwards, the Sustainability Check was finalised.

Step VII

The last and final step in developing the Sustainability Check is to disseminate and communicate the tool. Therefore, various measures were discussed with the Sustainability Check Advisory Board during the meeting in February 2007; these will be implemented in the near future.

Fig. 3: Aims for an agenda for sustainable tourism

Aims for an agenda for sustainable tourism	Reflected in the following objectives from Fig. 2:
1) Economic Viability: To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.	Objective 1, Objective 3
2) Local Prosperity: To maximise the contribution of tourism to the economic prosperity of the host destination, including the proportion of visitor spending that is retained locally.	Objective 1
3) Employment Quality: To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.	Objective 2
4) Social Equity: To seek a widespread and fair distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.	Objective 1, Objective 2
5) Visitor Fulfilment: To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.	Objective 4
6) Local Control: To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.	Objective 5
7) Community Wellbeing: To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.	Objective 1, Objective 6
8) Cultural Richness: To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.	Objective 6
9) Physical Integrity: To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.	Objective 7, Objective 8
10) Biological Diversity: To support the conservation of natural areas, habitats and wildlife, and minimise damage to them.	Objective 9
11) Resource Efficiency: To minimise the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.	Objective 7, Objective 8
12) Environmental Purity: To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.	Objective 7, Objective 8

Source: WTO-UNEP (2005): Making Tourism More Sustainable: A Guide for Policy Makers.