

SUSTAINABLE DESTINATION MANAGEMENT STRATEGIES IN THE OIC MEMBER COUNTRIES



Selected Case Studies, Main Challenges, Recommendations



13th Meeting of the COMCEC Tourism Working Group

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Presented by:

DinarStandard





Agenda

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Selected Case Studies, Main Challenges, Recommendations

1. **Case Studies**
2. **OIC Member States vs. Global Best Practices Comparative Analysis**
3. **Main Challenges**
4. **Policy Recommendations**

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The Maldives

Climate change threat spurs Maldives to focus on environmental sustainability



Sustainable Tourism Strategies

- Plan to achieve carbon neutrality by 2020
- “Increasing Climate Change Resilience of Maldives through Adaptation in the Tourism Sector Project (TAP)” developed standards to adapt to climate change
- Environmental regulations for beach resort development
- Annual visitor survey to ensure satisfaction
- Service diversification: resorts focusing on spas, in addition to traditional diving & snorkeling activities
- More locals were hired in tourism with Guesthouse tourism

Stakeholder Engagement

- Tourism Master Plan was developed with public and private sector stakeholders (meetings, workshops)
- Government worked with NGOs on coral reef protection policies
- Tourism industry implementing sustainability strategies (desalination plant, recycling factories as part of resort)
- Telecom provider Dhiraagu joined Parley’s “For the Oceans” campaign to reduce single-use plastic

The Maldives

Continuous monitoring, stakeholder involvement, and support from international organizations is needed



Funding

- Domestic and foreign sources
- Tourism taxes fund sustainability initiatives
- Funding from UNDP
- Tourism industry funds own projects (Kudadoo Private Island which is fitted with solar panels paid for by the property owners)

Monitoring & Evaluation

- Currently developing monitoring and evaluation tools and reporting with the support of the UNWTO
- Some resorts have Green Globe certification (recognizes commitment to environmental protection and local culture)

Lessons Learned

- Continuous monitoring is needed to ensure adherence to sustainability standards
- Tourism stakeholders needs to be more involved in development of tourism sustainability regulations
- Support from international organizations, such as the UNWTO in the Maldives' case, can be instrumental in developing destination-specific monitoring tools for sustainable tourism.

Oman

Efforts are underway to implement Oman's 2016-2040 Tourism Strategy



Sustainable Tourism Strategies

- Achieved 5 World Heritage site designations by UNESCO
- Oman Tourism Development Company: sustainability framework: Economy, Society, Environment, and Cultural Heritage
- All construction projects meet LEED certification criteria
- In low season, domestic tourism is encouraged through offers
- Create a Signature Experience Program (SEP) – planned program – affiliates deliver a superior tourism experience
- Oman Tourism Quality Assurance Framework will recognize achievement and quality improvements in the tourism sector
- Omanization program ensures Omani's are employed in all sectors
- Intajee connects farms with tourism resorts
- Zaree, an all women tour group shares local culture with tourists

Stakeholder Engagement

- Stakeholders will be invited to contribute to and support the Oman Tourism Strategy
- The industry is taking the initiative in implementing sustainable projects

Oman



Targeting sustainability minded tourists, benefiting the local community, efforts led by private sector

Funding

- The Oman Tourism Strategy calls for PPPs
- The required investment for the Oman Tourism Strategy is estimated at more than \$200 billion between 2016 and 2040, with an estimated 88% supplied by the private sector

Monitoring & Evaluation

- Return on Investment (SROI) Reports and Sustainability Reports are produced
- ISO 14001 environmental management system
- LEED building certification
- A national Tourism Sustainability Certification Program is planned for environmental and social/cultural sustainability

Lessons Learned

- Targeting the right tourists that are inline with its sustainability efforts
- Diversifying accommodation to include guest houses, homestays, camps, heritage lodges, green lodges allows the community to benefit
- Entry fees to wildlife reserves fund conservation efforts and raise awareness about ecosystems
- Private sector leading sustainability efforts, ahead of legislation

Uganda

National park entry fees support conservation projects



Sustainable Tourism Strategies

- Community Conservation program implemented by Uganda Wildlife Authority (UWA)
- 20% of park entry fees to national parks supports conservation projects
- Supporting local community: another 20% goes to a local community fund
- Cultural Values Conservation Project benefits local communities
- Training is provided through the Hotel Training & Tourism Institute
- Focusing on recreation, sports and events to promote domestic tourism in low season

Stakeholder Engagement

- Stakeholders were consulted by the Ministry in updating regulations
- Uganda has launched the East Africa Tourism portal in 2017 with Rwanda and Kenya as a joint tourism promotional initiative
- Uganda Tourism Board (UTB) partnered with the government and private sector to promote tourism
- The Uganda Tourism Association acts as the umbrella for other organization
- Regional Tourism Clusters are destination-level committees involving public and private sector stakeholders

Uganda



Continuous monitoring, stakeholder involvement, and support from international organizations is needed

Funding

- Direct government funding is limited
- 24 taxes on tourism, including 18% VAT is levied on safaris and \$600/day gorilla permits
- The World Bank funded sustainable development plans for 4 districts
- Conservation NGOs in the region funded sustainability activities

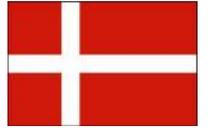
Monitoring & Evaluation

- Monitoring by Tourism Board focuses on visitor numbers
- Protected areas undergo regular evaluations through the Monitoring and Evaluation framework
- Sustainable Tourism Program and the Uganda Tourism Ecosystem Platform (UTEP) will support local industry
- Annual visitor exit surveys

Lessons Learned

- Limiting tourism in protected areas while increasing price can generate revenues while protecting local areas
- Rev. share w/ local communities helped community dev. and consrv. efforts, but utilization needs improvement
- Regional cooperation can play an important role in sustainable destination management.
- Improvement needed in monitoring of tourism impact on parks and local communities
- More incentives are needed to encourage investment in sustainable tourism projects

Denmark



Denmark ranked 3rd in the 2018 Environmental Performance Index Report, and 2nd in the 2016 Global Destination Sustainability Index

Sustainable Tourism Strategies

- Copenhagen has a comprehensive strategy to become the first capital to be carbon-neutral by 2025
- Wonderful Copenhagen (the DMO) has an internal sustainability committee
- Green Key program and certification, founded in Denmark, has 2900 members in 57 countries
- Wonderful Copenhagen raises awareness about sustainability among visitors and residents including training

Stakeholder Engagement

- Denmark has formal organizations that allow for collaboration between stakeholders. E.g.: The Danish Tourism Advisory Board
- Visit Denmark is digitalizing its value-chains to increase co-operation within the Danish tourism industry
- Through the Smart Insights initiative, the DMO provides data through a knowledge hub

Denmark

Sustainability performance is meticulously measured, stakeholders closely involved & business case for sustainability is expressed



Funding

- The Danish government contributed direct funding. In 2010 \$6.2 million was allocated to improve conditions for bicycle tourism
- Gov. allocated \$155,000 to raise awareness
- Denmark received funding from the European Regional Development Fund manage tourism in the Baltic region

Monitoring & Evaluation

- The annual DMO report includes sustainability performance
- An externally audited sustainability report using GSTC criteria is also provided
- Metrics include CO2 emissions/capita, % of energy from renewables, air pollution level, traffic congestion, green areas/ 100,000 inhabitants, % room inventor, congress venues w/ sustainability certification

Lessons Learned

- Strategies are more effective when part of wider sustainability efforts and strategies
- Important to identify sustainability issues and set a clear strategy to tackle them
- Presenting a good business case for sustainability can facilitate adoption. One of the motivations for adopting sustainable and environmentally-friendly policies for stakeholders is the financial benefit
- Regional projects can benefit from funding from regional organizations

Italy

Public and private stakeholders produced the National Strategic Plan for 2017-2022



Sustainable Tourism Strategies

- Tourism Strategic Plan aims to better distribute visitor flows
- Ministry of Tourism and the Italian electricity and gas company will provide electric charging stations, to improve air quality and reduce noise
- The Ministry launched Cammini d'Italia atlas and website which offers travelers an intermodal infrastructure of green roads
- Ministry program to support and reward innovative business ideas in tourism
- In 2015, Italy introduced a tax credit system to incentivize renovation
- Ministry allocated a budget of €460 million until 2020 to support the restoration and upgrading of tourism structures

Stakeholder Engagement

- Public and private stakeholders came together in 2016 to produce the National Strategic Plan for Tourism 2017-2022
- Plan focuses on four major areas: 1) territory and heritage, 2) competitiveness and employment, 3) putting the tourist at the center, and 4) integration and interoperability

Italy

Destinations must plan to avoid over tourism before a crisis situation actually occurs



Funding

- Budget for the Ministry of Tourism in 2018 was €2.4 billion
- The Culture and Innovation 2014-20 Program financed by the EU Structural Funds provides a budget of €490 million
- A Tourism Investment Fund was created in 2014 managed by the National Investment Bank and has a ceiling of €250 million
- €9.5 million from the European Regional Dev. Fund, which supports 13 EU countries on sustainable maritime tourism
- Additional funding is provided from tourism taxes

Monitoring & Evaluation

- Impact analysis are carried out by universities, international organizations, and statistics agencies
- ENIT Monitoring is the national agency's tool to survey and observe the tourism sector nationwide
- Each region has its own agency to monitor tourism in its area

Lessons Learned

- Increase in # of visitors can have negative environmental and cultural impacts. Destinations must plan to avoid over tourism before a crisis situation actually occurs
- Good communication channels have to be established between the private and public sector
- Tourists' impact on the environment should be measured using quantitative as well as qualitative indicators

Jordan

Jordan's sustainable tourism strategies are supported by international organizations such as the USAID and UNDP



Sustainable Tourism Strategies

- National Tourism Strategy 2011-2015 w/ support of USAID focuses on 1) Marketing & Promotion, 2) Product Development, 3) Labor Market Development, and 4) Enabling Environment
- “The Meaningful Travel Map of Jordan” launched by the DMO ensures local population benefits
- The Mainstreaming Biodiversity in the Tourism Sector Development in Jordan (BITS) Project, launched by the UNDP and Ministry focuses on protecting biodiversity
- Non-profit “Experience Baraka” builds tourism micro-businesses to strengthen the local community

Stakeholder Engagement

- The Ministry of Environment partnered up with some of the main governing bodies at the national and regional level in tourism, including MoTA and PDTRA, to collaborate in project assessment and policy development to protect the environment.
- The private sector works to raise awareness among policy makers about the economic benefits of tourism and the importance of sustainable practices

Jordan

Financial and technical assistance from international bodies is instrumental for Jordan



Funding

- Both domestic and foreign sources are used to fund tourism sustainability activities
- Domestic funding is from the government and the industry
- Foreign funding is from bilateral and international organizations (USAID, UNDP)

Monitoring & Evaluation

- Performance indicators include arrivals, receipts, tourism's contribution to employment, services and facilities, visitors to main sites
- Indicators for UNDP Mainstreaming Biodiversity include % allocation for biodiversity conservation in new development projects, size of land where impacts on biodiversity are avoided, Management Effectiveness Tracking Tool

Lessons Learned

- Financial and technical assistance from bilateral donors and international bodies instrumental
- Jordan has taken steps towards sustainable tourism but needs further regulation
- Private sector is involved in strategy dev. at a national level, but local/ regional engagement can be improved

Palestine

The political situation poses a lot of stress on the tourism sector



Sustainable Tourism Strategies

- Sustainable activities are promoted by private stakeholders and humanitarian enterprises
- Code of Conduct for Tourism in the Holy Land, launched in 2008 by the Palestinian Initiative for Responsible Tourism (PIRT) contains guidelines for equitable tourism
- The UNDP launched a program with Al-Quds University to preserve Palestinian cultural heritage in Al Quds' Old City
- Other programs by the Alternative Tourism Group, the Jerusalem Tourism Cluster, and Eyewitness Palestine, focus on protecting Palestinian identity and culture, and promoting responsible and politically-aware tourism

Stakeholder Engagement

- The absence of a national umbrella
- Palestine's tourism laws fail to efficiently regulate the sector since basic elements such as the relationship between private-public players, the protection of sites, and the responsibilities of stakeholders, are unregulated.
- The Jerusalem Tourism Cluster brings together stakeholders in order to enhance competitiveness through economic growth

Palestine

The political situation has limited public funding as well as restricted monitoring and evaluation



Funding

- Public funding is minimal
- Foreign funding is provided from international organizations (e.g. UNDP)

Monitoring & Evaluation

- Indicators used for Al Quds are from Israeli institutions and focus on standard indicators such as visitor numbers, expenditure, job creation, contrib. to GDP

Lessons Learned

- The political and social circumstances of a destination condition it and directly affect its growth
- The improvement of human resources through guide training programs, education, and language teaching has to be established in order to preserve Palestine's historical, cultural, social, and religious heritage in the city of Al Quds and to protect it

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Sustainable Destination Management Parameters

Comparing OIC practices across sustainable destination management parameters with global best practices



Parameter 1: Supportive Regulatory Environment

In non-OIC countries, governments develop and enforce policies, while private sector and NGOs implement sustainable practices

Non-OIC Countries

- Developing and enforcing sustainable tourism strategies and policies is the government's responsibility
- Public, private, and non-governmental organizations are involved in sustainable destination development; umbrella organizations are established to ensure coordination
- Policies used to enforce the adoption of sustainable practices including setting sustainability targets such as maximum carrying capacities, land use planning regulations, and environmental taxes and incentives.

OIC Countries

- Mainly government and, in some instances, non-governmental organizations, are involved in promoting sustainable tourism practices
- There's an absence of umbrella organizations facilitating coordination

Sustainable Destination Management Parameters

1	Supportive Regulatory Environment
2	Stakeholder Engagement
3	Effective Tourism Sustainability Strategies
4	Access to Financing Tools
5	Monitoring Destination Sustainability

Parameter 2: Stakeholder Engagement

In non-OIC countries, umbrella organizations ensure coordination among public, private and non-governmental organizations

Non-OIC Countries

- High level of formal engagement with industry stakeholders
- Organizations are established that allow for collaboration and coordination
- Engagement and support initiatives are in place to encourage stakeholders to adopt sustainable tourism practices

OIC Countries

- Have some formal structure that aligns the broader tourism industry with sustainability efforts, but falls short on the process of ongoing engagement and consultation

Sustainable Destination Management Parameters

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Parameter 3: Effective Sustainable Tourism Strategies

Strategies in non-OIC countries are comprehensive; Jordan has strong initiatives supported by international donors

Sustainable Destination Management Parameters	
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5	Monitoring Destination Sustainability

Non-OIC Countries

- Have well-defined goals
- Have comprehensive initiatives covering sustainable tourism strategies
- Tourism sector is encouraged through incentives to adopt sustainable practices

OIC Countries

- Many of the initiatives are still emergent
- Jordan has strong initiatives due to the support of bilateral and international donors

Sustainable Tourism Goals	Impact Area			
	Economic	Social	Environmental	
Economic Vitality	Managing Demand and Seasonality			
Local Prosperity	Managing Demand and Seasonality			
Employment Quality	Ensuring Local Community Well-being			
Social Equity	Ensuring Local Community Well-being	Ensuring Local Community Well-being		
Visitor Fulfilment		Ensuring Tourist Satisfaction		
Local control		Ensuring Local Community Well-being		
Community Wellbeing		Ensuring Local Community Well-being		
Cultural Richness		Protection of Cultural Heritage		
Physical Integrity			Increasing Awareness	
Biological Diversity			Protection of Natural Heritage	
Resource Efficiency	Managing Environmental Impact (Non-Renewable Resources Usage)		Managing Environmental Impact	
Environmental Purity				Ensuring Tourist Satisfaction

Parameter 4: Access to Funding

Both public and private domestic sources are used to fund sustainable tourism initiatives in OIC and leading non-OIC countries

Sustainable Destination Management Parameters	
1	Supportive Regulatory Environment
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Non-OIC Countries

- Domestic funding is from both public and private sources
- Receive international funding, including from regional organizations

OIC Countries

- The ability of the private sector to finance sustainability initiatives is hindered by the shortage of resources of tourism businesses and their inability to get loans
- International funding is mainly from international and bilateral organizations

Funding Sources



Parameter 5: Monitoring Destination Sustainability

Sustainable tourism indicators cover economic, socio-cultural, and environmental tourism impacts as well as sustainable destination management performance

Sustainable Destination Management Parameters	
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5	Monitoring Destination Sustainability

Non-OIC Countries

- Have formal procedures in place for continuous monitoring and reporting on destination sustainability
- Indicators used are internationally recognized and comprehensive

OIC Countries

- Focused on measuring the economic impacts of tourism and to some extent are measuring environmental impacts
- Lack formal procedures for continuous monitoring and reporting on destination sustainability - this is changing due to various initiatives supported by both bilateral donors and international organizations

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OIC Member Countries Main Challenges

Challenges exist under each of the sustainable destination management parameters

Supportive Regulatory Environment

- Not enough policies to promote sustainable tourism
- National and local tourism development plans at odds with sustainability needs
- Lack of coordination among government departments

Stakeholder Engagement

- An absence of umbrella organizations facilitating coordination
- Shortage of ongoing engagement and consultation of stakeholders

Effective Sustainable Tourism Strategies

- Strategies in early phases of development
- Lack of awareness
- Prioritization of economic objectives

Access to Funding

- Insufficient resources allocated to sustainability
- Shortage of resources for the tourism industry

Monitoring Destination Sustainability

- Lack formal procedures for continuous monitoring and reporting on destination sustainability

Agenda

SUSTAINABLE DESTINATION MANAGEMENT STRATEGIES IN THE OIC

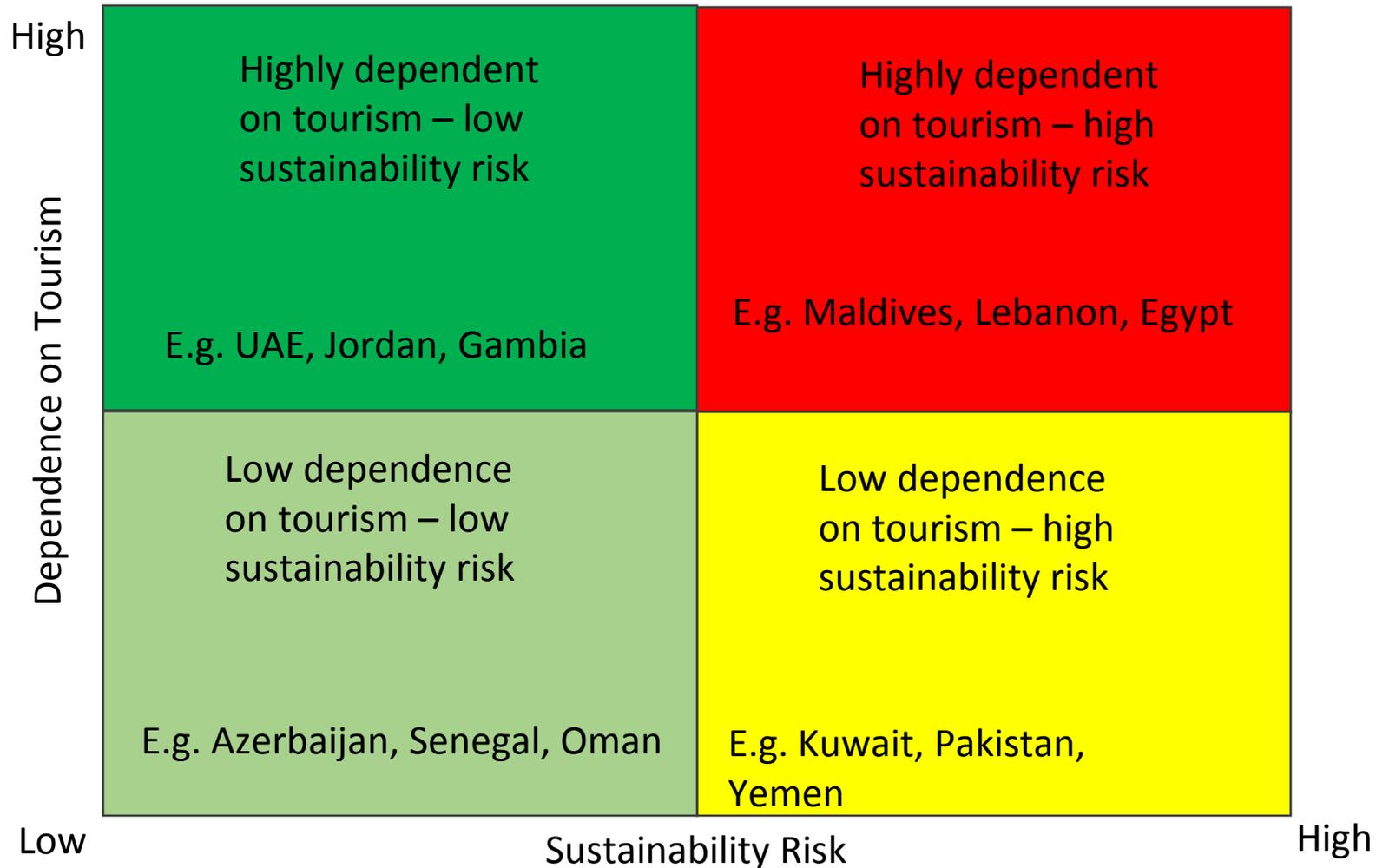
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Policy Recommendations for the OIC Member States

Segmentation Of OIC Tourist Destinations

Destinations can be segmented by their dependence on tourism and their sustainability risk



Source: WEF Travel & Tourism Competitiveness Report 2017 and DinarStandard Analysis

Policy Recommendations for the OIC Member States

Policy Recommendations Framework

Recommendations address both Sustainable Destination Management Parameters as well as Sustainable Tourism Strategies



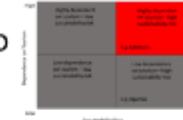
Policy Recommendations for the OIC Member States

Policy recommendations re: sustainable destination management parameters

Sustainable Destination Management Parameters

1. Supportive Regulatory Environment

- Governments to establish and enforce policies that promote the adoption of sustainable tourism practices
- Governments to impose sanctions and incentives conducive to sustainable tourism practices



2. Stakeholder Engagement

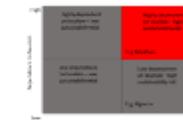
- Establish an umbrella organization that encompasses government sectors, DMOs, tourism businesses to streamline sustainable tourism efforts
- Form strategic alliances with airlines and other entities



3. Effective Tourism Sustainability Strategies

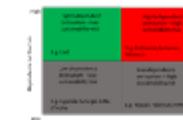
4. Access to Financing Tools

- Apply for international funding for sustainable tourism projects
- Establish regional organizations to support sustainable tourism efforts and provide funding
- Facilitate green finance
- Encourage private sector financing and investment in sustainable tourism



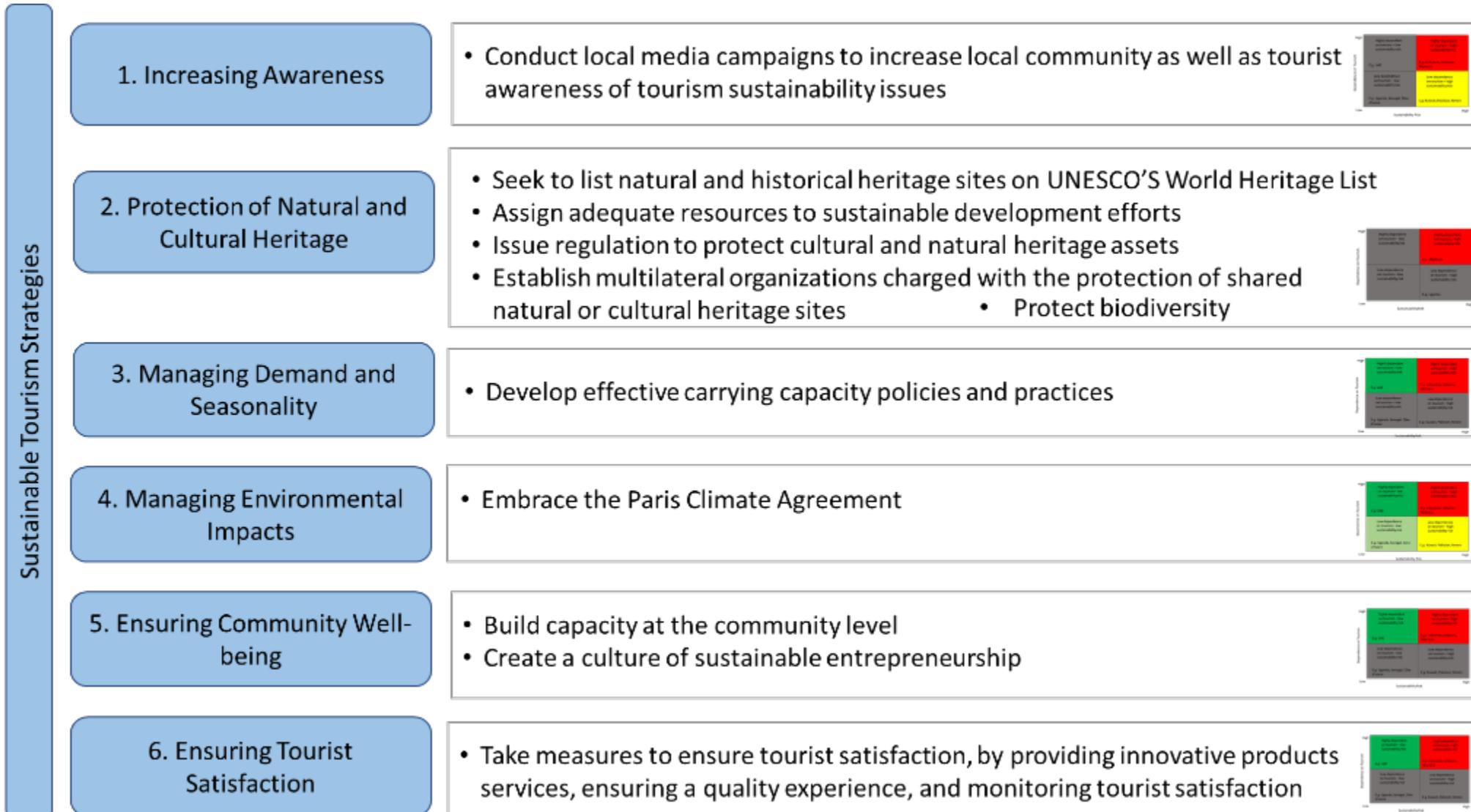
5. Monitoring Destination Sustainability

- Monitor Performance
- Translate and implement Agenda 2030 in a sustainable tourism context
- Align science, policy, and capital in pursuit of sustainable tourism
- Develop Key Performance Indicators (KPIs) for sustainability
- Establish an OIC-level sustainable tourism monitoring system
- DMOs to play a role in monitoring performance



Policy Recommendations for the OIC Member States

Policy recommendations re: Sustainable Tourism Strategies



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We look forward to hearing from you.

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