Comparative report: main GAPs and some recommendations

Competence centres for the development of sustainable tourism and innovative financial management strategies to increase the positive impact of local tourism in Thailand and Vietnam

TOURIST

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Within the first Work Package of this project, "Comparative analysis of the tourism industry and sustainable tourism efforts in Thailand (TH), Vietnam (VN) and the EU", the comparative analysis between Thailand, Vietnam and the three European countries was the main deliverable underlining the main needs and gaps that these five countries face in regards to sustainable tourism and innovative financial management strategies. These aspects are described in the following pages and serve as a base for the next activities within this project.

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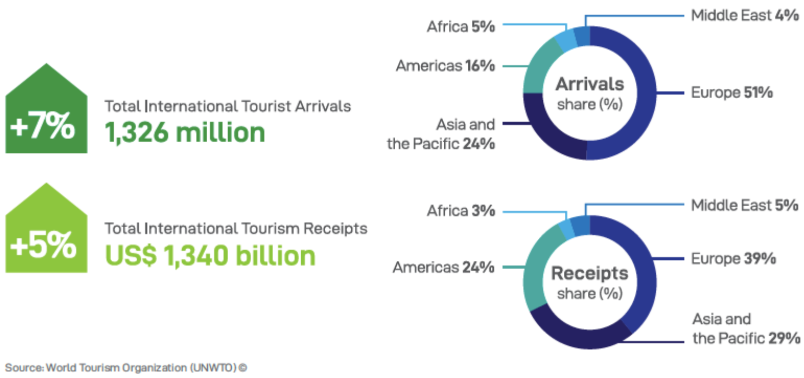
FOREWARD

Despite the fact that tourism was considered a non-productive sector for many years, with little impact on the economy due to the focus on leisure activities (Vanhove, 2011), in the last decades it become one of the largest and most fast growing industries (Kaiwa, 2017; WEF, 2017). Nowadays tourism is an economic and development factor of great significance in the world. In fact, the World Economic Forum states that the contribution of travel and tourism industry to the world gross domestic product (hereinafter GDP) is over 10% and is expected to get close to 12% by 2028 including direct, indirect and induced contribution. It is not that relevant if you do not think of the whole value chain involved in this sector. However, apart from its contribution to the GDP, the share attributable to industries that tourism generates involving a broad set of production sectors (Scarpato et al., 2014) and its great capacity of creating jobs, almost 10% of the total employment (WEF, 2017), makes tourism more relevant. Thus, tourism matters not just to its impact on the economy (jobs creation, revenues coming from tourism, participation to the gross domestic product or to the exports), but also on the social and cultural dimension (see figure 1).

Figure 1. Why tourism matters?

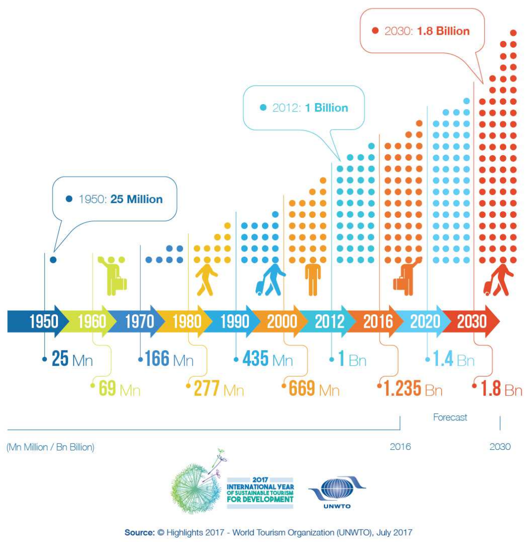
Even during the recent crisis travel and tourism industry had a very important role (Tang and Tan, 2018). It was during the Great Recession when (Campos-Soria et al., 2015)many tourists decided to cut back on tourism expenditures via fewer holidays, reduce length of stay, opting for cheaper means of transport, cheaper accommodation, travelling closer to home or changing period of travel, for example (Campos-Soria et al., 2015). On the other hand companies in the accommodation subsector started to focus on high quality, brand image and a loyal customer base in order to face the financial crisis of 2008-09 (Alonso-Almeida and Bremser, 2013). Some hotel chains had to renounce to real-estate assets in order to ensure availability of financial resources during the recent crisis (Brida et al., 2015). All in all, travel and tourism companies had to innovate at a faster rhythm for facing the reduction of financial resources and the tourism demand. Still, given the macroeconomic policies adopted by the governments aiming to recover their respective economies, tourism has also recovered accounting for over 1,300 billion US$ in 2017 (5% more than in 2016) and over 1.3 billion international tourists arrivals (UNWTO, 2018).

Figure 2. Evolution of international tourist arrivals and receipts 2017



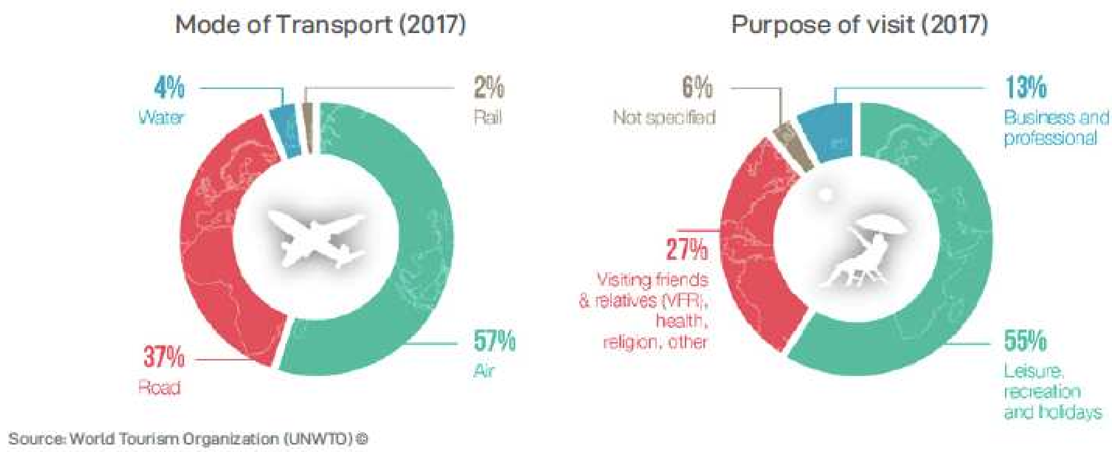
The dynamism of tourism is nothing now. International tourism arrivals have increased from 25 million globally in 1950 to 1.4 billion in 2018 and is forecasted to reach 1.8 billion by 2030 despite its each time more moderated speed (UNWTO, 2017). At the same time, revenues from tourism worldwide experienced a growth rate of over 10% since 1950 (figure 3).

Figure 3. Evolution of international tourist arrivals: 1950-2030



Its strength, on one hand, is due to the emergence of many new destinations, but also to the diversification of tourism and types of travel and the relevance of achieving each time a more personalized experience (Lee et al., 2018). By taking advantage of the evolution of the technology of information and communication, the each time more affordable air transport to exotic destinations or just destinations not easy to reach some decades ago, many people from all over the world started to move more often motivated by different purposes (see figure 4). Thus, it seems to be a consequence of globalization, as deepening globalization does not mean only economic increase and life standards improvements, it also implies improving purchase capacity.

Figure 4. Ways and reasons of traveling in 2017



It was since the beginning of 2000s when more attention started to be paid to the impact of tourism over economic growth. There is a vast amount of specialized literature underlining that tourism is a driving force of economic growth that might benefit development of the host countries through multiple mechanisms (Brida and Pereyra, 2009; Tang and Tan, 2018; Dogru and Sirakaya-Turk, 2017; Imran et al., 2014; Lanza et al., 2003; Lee and Brahmasrene, 2013; Li et al., 2018; Muganda, Sahli, & Smith, 2010; Raza and Shah, 2017; Schubert et al., 2011; Sinclair and Stabler, 1997; Shahzad et al., 2017; Suntikul, Bauer and Song, 2009): (1) the foreign exchange brought by tourists and the improvement of the current account balance; (2) the job creation, which helps alleviate poverty and reduce economic inequality between developed and less developed countries, and increase subsequent tax revenues; (3) the investment in infrastructure, human capital and technology; (4) the rising competition and productivity and thus, the efficiency promotion; and (5) the use and exploitation of economies of scale and scope boosted by tourism.

However, contradictory results were pinpointed by specialized literature; contradictions attributed to differences in country-specific factors, e.g., level of income and institutional qualities (Brida et al. 2016; De Vita & Kyaw, 2017). Thus, the effectiveness of tourism incentive packages for accelerating economic growth will depend especially on the income and institutional heterogeneity across countries as the contribution of tourism to economic growth is largely determined on the ability to attract genuine tourists (Tang and Tan, 2013) and the absorptive capacity (De Vita and Kyaw, 2017). Therefore, designing and implementing reasonable policy or recommendations for enhancing tourism, policies able to boost a positive effect, not just over the economic growth but also over a sustainable development is not an easy task.

In fact, Higgins-Desbiolles (2018) underlines that the addiction of tourism to growth might be a problem as tourism authorities continue to promote tourism development without considering sustainability goals as designed and agreed under the framework of the 2030 Agenda for Sustainable Development. This agenda set of 17 Sustainable Development Goals[1] and 169 associated targets as a global framework to end extreme poverty, fight inequality and injustice, and fix climate change until 2030. The potential to contribute directly or indirectly to all of the goals made tourism part of the targets in Goals 8, 12 and 14 on inclusive and sustainable use of oceans and marines resources, respectively. Achieving the 2030 agenda, a clear implementation framework, adequate financing and investment in technology, infrastructure and human resources is required (UNWTO, 2017).

[1] Based on the Millennium Development Objectives that were only partially achieved by 2015 and in a very reduce amount of target countries.

1. Introduction

The Comparative analysis report is part of work package 1 "Comparative analysis of the tourism industry and sustainable tourism efforts in Thailand (TH), Vietnam (VN) and the EU" of TOURIST Erasmus+ project. It aims to combine the input generated through the desk research, the focus groups as well as the GAP report conducted within the first deliverables of work package one. During these activities information was gathered on an academic and expert level in order to combine research data and the industry perspective in one output that will allow to compare the status quo of sustainable tourism both in European countries (Austria, Finland and Spain) and Southeast Asian countries (Thailand and Vietnam).

This comparative study aims to provide a brief analysis of the tourism industry focusing on sustainable tourism efforts and strategies following the "Travel and Tourism Competitive Index" in the partner and programme countries, to identify the main gaps which can be situational or competence based and to propose **recommendations** on how the **gaps** between the respective countries could be **minimized**, especially focusing on the **training sessions on sustainable tourism and innovative financial management strategies** which are the main part of the second work package "Capacity Building Trainings" and a cross-country good practice learning strategy which should be exploited and improved under the umbrella of work package five "Network for national and cross-country exchange".

As mentioned above, the main reference documents for the comparative report are the following:

a. TOURIST Status-Quo Analysis
b. TOURIST Focus Group Reports
c. TOURIST GAP Report
d. Input from Sustainable Tourism Expert within the consortium
e. Specialized literature in the area.

Tourism, as a resource-intensive industry, is interconnected with the natural, social and economic elements at multiple scales and time periods (Farrell and Twining-Ward, 2004) and must be accountable in terms of sustainability not just locally, but also globally (Lu and Nepal, 2009). Sustainable tourism (hereinafter ST) is a hot topic lately. Given that sustainability is defined, interpreted and implemented differently by individuals, stakeholders and social groups, for the development of work package 1, a common knowledge background was required including sustainability and sustainable tourism concepts.

Often there is confusion between sustainable tourism and ecotourism

While ***ecotourism*** refers to a segment of the tourism industry, with particular interest in nature and is based on principles of sustainability, ***sustainable tourism*** refers to sustainability criteria which must, however, be applied to all tourist forms, whatever their motivations (vacation, health, adventure, nature, work). In the tourism sector the concept of sustainability is reflected in the fact that all services, infrastructure, operations, management, development and planning must meet criteria of environmental, social and economic sustainability.

It is stated that sustainability is a complex concept, which requires more critical and comprehensive analysis (Butler, 1999). Consequently, ST is recommended to be considered as an "adaptive paradigm" (Hunter, 1997) or as "adaptive management" (Farrell and Twining- Ward, 2004) able to addresses issues of unpredictability and uncertainty of events, outcome and complexity of scale and times (Lu and Nepal, 2009). Four main basic principles that have been considered regarding sustainability were identified by Lu and Nepal (2009) as follows: (1) the idea of holistic planning and strategy-making; (2) the importance of preserving essential ecological processes; (3) the need to protect both human heritage and biodiversity and (4) development based on the idea that productivity can be sustained over the long term for future generations (WCED, 1987).

ST development is defined as meeting the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is foreseen that ST will lead to the management of all resources keeping in mind that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems (UNWTO, 1998).

However, many questions have been raised about the vagueness of ST definition as follows:

(1) Lack of specificity of human needs, time period to determine if human needs have been satisfactorily met and uncertainties in situations where needs may be conflicting (Butler, 1999).
(2) ST should be defined from a multisectoral approach, stressing growth under viability maintenance (Wall, 1997).
(3) Although ST has areas of shared concern with sustainable development, its own specific tourism-centric agenda might be alongside sustainable development (Hunter, 1995).

The definition of ST was broadened by transferring the principles of sustainable development into the context of tourism needs (Hardy and Beeton, 2002), and including environmental, economic, social and cultural issues, political power and social equality. Even though, the viability of sustainability remains a key issue in ST as it is unrealistic to balance opposite interests (e.g., environmentalists, public administration, practitioners, local community, tourists, etc.). So, trade-off decisions will unquestionably create priority for certain interests (Hunter, 1997).

This is where the role of policy makers must be underlined. There is no doubt that the 2030 Agenda offers tourism new opportunities under a shared responsibility It is therefore expected to have public authorities as the core of the decision-making process. But, leadership and collaboration among all stakeholders are essential in achieving sustainable tourism and, thus, sustainable development goals. Still, for accelerating the shift towards a more sustainable tourism implies aligning policies, business operations and investment with sustainable development goals. Unfortunately, there is clear scarcity in the implication of tourism policymakers, in both developing and developed economies, in national sustainable planning (UNWTO, 2017). Institutional initiatives via an active participation in designing and implementing national policies, strategies, action plans and processes are vital in the way towards a more sustainable tourism (Torres-Delgado and López-Palomeque, 2012).

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However, it is not all on policymakers even though they are the actors in charge of strengthening the links and communication between all stakeholders. Tourism private sector can also contribute significantly to achieving a more sustainable development; one way would be CSR activities, which among tourism sector are employed by accommodation, transport and tour operator industries, for example. Moreover, practitioners might contribute to boost “Responsible Consumption and Production”, “Climate Action”, “No Poverty”, “Quality Education” and “Decent Work and Economic Growth” sustainable development goals. According to the analysis carried out by UNWTO in this sense, some tourism practitioners underlined that by aligning business objectives with sustainable development goals increases efficiency reduces costs and increases competitiveness whilst boosting their social license to operate. This will at the same time facilitate product differentiation and reduce risk management. Another important role of practitioners is linked to its capacity of retaining profits locally as well as reinvesting in the local value chain.

It is worth mentioning the importance of residents´ and tourists´ behaviour as well in line with sustainable tourism linked to all sustainable development goals. A process of sustainable tourism development should balance the well being of the local population with the well being of visitors and the economic well being with the conservation of environmental quality (Romei, 2008). In other words, ST should include all types of tourism development through the preservation of natural and cultural resources, respecting the integrity of the ecosystem in the long run (not just the use of ecosystems) and being socially equitable and economically efficient.

Several additional aspects are to me mentioned: measuring the progress of economic, social and environmental impact of tourism, enhancing private sector investment by creating a proper environment as well as financing of tourism sector embracing innovative financing mechanisms (e.g., Green bonds, impact investment, energy efficiency loan facilities, blended finance, smart incentives for eco-certification, voluntary contributions).

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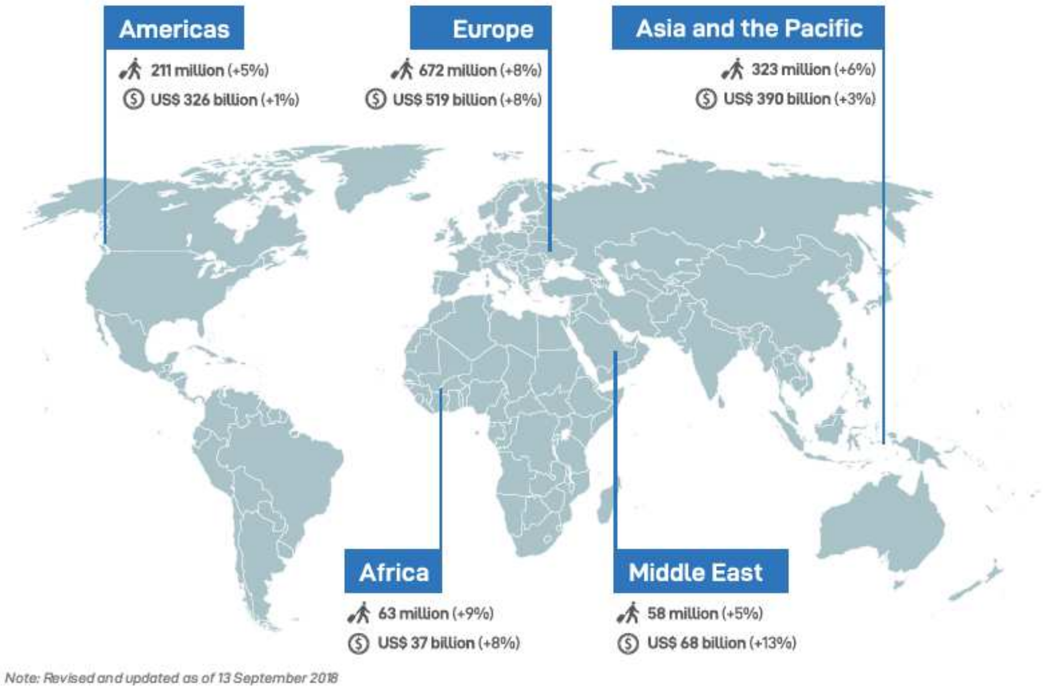
2. Europe and Sustainable Tourism

2.1. European Tourism Industry in a Nutshell

2.1.1. General insides

More than 50 % of international tourist arrivals are in Europe, which leads us to think that is the preferred destination worldwide. However, while maintaining the highest number of international arrivals, the European market recorded the lowest growth rates, as it has in place a redistribution of market shares in favour of international tourist emerging areas. In particular, over the last decade, the annual growth rate of tourist flows in developing countries has been higher than the world average (UNWTO, 2013). It is especially in developing countries where tourism can be an opportunity for economic development, an opportunity to conserve and protect natural heritage, arts and culture, but also an important mechanism for combating poverty.

Map 1. Distribution of tourism by regions 2017



Source: UNWTO (2018).

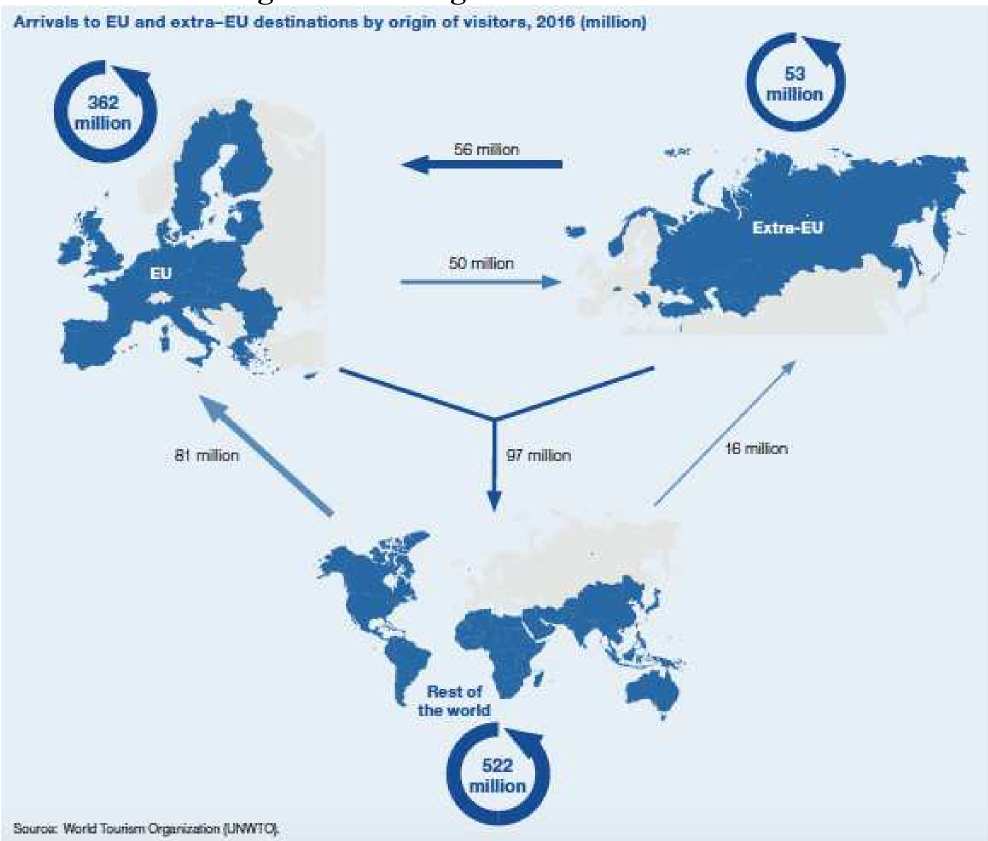
Europe is maintaining its leadership in the global tourism market. Despite the recent events (e.g., recent crisis, geopolitics, economic and political uncertainty, etc.), tourism managed to maintain its position and given its remarkable flexibility it become one of the fastest-growing sectors in the European economy.

In order to face increased competition from destinations outside the European Union (hereinafter EU), boosting investment, supporting small and medium enterprises (hereinafter SMEs), exploiting the opportunities of the digital economy and collaborative economy, and equipping tourism professionals with the right skills are some of the aspects that the EU has in the spotlight. Under a continuously changing environment, designing and implementing appropriate and forward-looking policies is he path the EU takes aiming at boosting the potential of European tourism taking into consideration the challenges and trends of the sector.

The UNWTO underlined some key aspects to be taken into consideration regarding EU tourism and its trends as follows:

(1) Europe is the world's largest source region for outbound tourism. In fact, in 2017 the European Union received 538 million international tourist arrivals, i.e. 40% of the world's total.
(2) EU destinations counted 608 thousand accommodation establishments in 2016 with a total capacity of 31 million bed-places, 44% of which were in hotels. Around 1 billion guests spent 3.1 billion nights in EU accommodation establishments.
(3) Tourism generates 10% of GDP and represents 9% of total employment in the European Union. International tourism accounts for 6% of EU overall exports and 22% of services exports.
(4) EU destinations received in 2016 about 139 million arrivals from outside the Union, of which 56 million from European source markets outside the EU. They received 83 million arrivals from outside Europe, of which 47% from the Americas, 40% from Asia and the Pacific, 7% from Africa and 6% from the Middle East.
(5) Guests from Extra-EU source markets spent 137 million nights in EU accommodation establishments in 2016, and guests from interregional source markets, 276 million. The United States is the top source market outside the EU with 74 million nights, followed by Switzerland (44 million nights), the Russian Federation (32 million nights) and China (25 million nights).
(6) Within the EU, Southern and Mediterranean Europe is the most visited group of countries, followed by Western Europe (12% less visitors), Northern Europe (53% less visitors) and Central and Eastern Europe (50% less visitors).

Figure 5. Main figures of the EU tourism



Source: UNWTO (2018).

2.1.2. European agenda on tourism

The tourism policy of the European Union aims to maintain Europe's leading destination while maximising the industry's contribution in the following aspects: (1) growth; (2) employment and (3) promoting cooperation between EU countries, particularly through the exchange of good practice. Consequently, it is intended to encourage a coordinated approach and define a new framework for action to increase its competitiveness and its capacity for sustainable growth.

In this line, since the beginning of the 21st century, the European Commission has promoted important public policies in tourism that have as main purposes the following aspects:

- Promote **competitiveness and sustainability** of European tourism,
- Develop the **environmental regulatory framework** for tourism;
- Support the activities of **promotion of the tourist destinations** of the Community.

Even though the EU is supporting coordination in tourism to supplement the actions of member countries, some challenges are faced:

- **Security and safety** - environmental, political, and social security; safety of food and accommodation; and socio-cultural sustainability threats.
- **Economic competitiveness** - seasonality, regulatory and administrative burdens; tourism related taxation; difficulty of finding and keeping skilled staff.
- **Technological** – keeping up to date with IT developments caused by the globalisation of information and advances in technology (IT tools for booking holidays, social media providing advice on tourism services, etc.).
- **Markets and competition** - growing demand for customised experiences, new products, growing competition from other EU destinations.

The EU implemented several initiatives that incorporates the concept of sustainable tourism, summarized in table 1. More details regarding these initiatives and their impact are described by Torres-Delgado and López-Palomeque (2012).

Table 1. Institutional initiatives in Europe incorporating the concept of sustainable tourism

Year	Principal references
1990	European Parliament: — *Resolution on the Resources Necessary to Protect the Environment from Potential Damage Caused by mass Tourism*
1992	Council of the European Union: — *European Action Plan to Assist Tourism (1993–1995)*
1993	European Commission: — *5th Community Programme of Policy and Action in relation to the Environment and Sustainable Development (1993–2000)*
1995	European Commission: — *Green Paper. The Role of the Union in the Field of Tourism*
1997	Conference on Employment and Tourism, Luxembourg (EC): — Creation of a High Level Group on Tourism and Employment 1st European Conference on Sustainable Development on Islands, Menorca (UNESCO-INSULA-Council of Menorca): — *European Island Agenda*
1999	Europarc Federation: — *European Charter for Sustainable Tourism in Protected Areas*
2001	European Commission: — *Sustainable Tourism and the Natura 2000 network* European Commission: — *A Framework for Cooperation for the Future of European Tourism* — Creation of the European Tourism Forum
2002	European Parliament: — *Resolution for a Framework for Cooperation for the Future of European Tourism* Council of the European Union: — *Resolution on the Future of European Tourism* 1st European Tourism Forum, Brussels (EC): — *Agenda 21—Sustainability of the Tourist Sector in Europe*
2003	European Commission: — *Basic Orientations for the Sustainability of European Tourism* European Environment Agency (EEA) Report 3/2003 Global Environment Outlook: — *European Environment: The Third Evaluation*
2004	Founding of the Group for Sustainable Tourism (GST)
2005	European Parliament: — *Resolution on Tourism and Development* — *Resolution on New Perspectives and New Challenges for Sustainable European Tourism*
2006	European Commission: — *A New Tourism Policy for the EU: Towards Greater Collaboration in European Tourism*
2007	GST Report: — *Action for More Sustainable and Competitive European Tourism* European Commission: — *Action for More Sustainable and Competitive European Tourism* 5th Eurometting Conference, Florence: — *Towards a European Network of Sustainable and Competitive Tourism* — Founding of the European Region Network for Sustainable and Competitive Tourism (NECSTour)
2009	8th European Tourism Forum, Brussels (EC): — *Tourism in the European Union and Economic Recession New opportunities for a Sustainable and Prosperous Future?*

Source: Torres-Delgado and López-Palomeque (2012).

Based on the research carried out by Umbelino et al. (2014), in 2010 the European Union adopted a new political framework for tourism setting out a new strategy and action plan for EU tourism emphasizing four action cornerstones:

(a) Stimulate **competitiveness** in the European tourism sector.
(b) Promote the **development of sustainable, responsible, and high-quality tourism**.
(c) Consolidate Europe's **image as a collection of sustainable, high-quality destinations**.
(d) Maximise the potential of EU **financial policies for developing tourism**.

The major initiatives to be implemented within the strategy are updated regularly through the implementation of a rolling plan[2] counting with the collaboration of public authorities, tourism associations and other public/private tourism stakeholders.

Out of the actions that were set out through the strategy and action plan adopted in 2010, the majority has been implemented successfully keeping in mind the following priorities:

- Increasing tourism demand, from within the EU and beyond
- Improving the range of tourism products and services on offer
- **Enhancing tourism quality, sustainability, accessibility, skills, and ICT use**
- **Enhancing the socio-economic knowledge base of the sector**
- Promoting Europe as a unique destination
- Mainstreaming tourism in other EU policies.

2.1.3. Travel and tourism competitiveness

By improving the competitiveness of tourism it is expected that the sector will register a more dynamic and sustainable growth. The strong connection of tourist destinations´ quality and their natural and cultural background and their integration into a local community highlights the link between competitiveness and tourism sustainability (EC, 2010). For that, the EU considers several aspects:

(a) Developing **innovation** in tourism,
(b) Reinforcing the **quality** of supply in all its dimensions,
(c) Improving **professional skills** in the sector,
(d) Attempting to **overcome the seasonality of demand**,
(e) **Diversifying the supply** of tourist services and
(f) Helping to **improve statistics and analyses** on tourism.

Counting with a vast presence of small and medium-sized enterprises (SMEs), tourism has significant potential for the development of entrepreneurial activity. Furthermore, there are important synergies with the arts and craft trades, which can help to preserve the cultural heritage and develop local economies.

The sustainability of tourism covers a number of aspects: the responsible use of natural resources, taking account of the environmental impact of activities (waste, water, land and biodiversity, etc.), the use of 'clean' energy, protection of the heritage and preservation of the natural and cultural integrity of destinations, the quality and sustainability of jobs created, local economic fallout or customer care. These principles are largely reflected in tourism strategies introduced at national and regional level, although they find insufficient expression in specific actions.

[2] More details available at http://ec.europa.eu/DocsRoom/documents/10155/attachments/1/translations

The last Travel and Tourism Competitiveness report developed by the World Economic Forum underlines that Europe and Eurasia is once again the region with the strongest overall T&T competitiveness performance, with six economies in the top 10. Its cultural richness, excellent tourism service infrastructure, international openness as well as its perceived safety, despite slightly declining security perceptions in Western and Southern Europe are the main reasons of its leading position. There are many differences among sub-regions, including the prioritization of the sector, environmental sustainability policies and an enabling business environment.

Spain, counting with over 7 million more international arrivals in 2017, has the leading position also in the last report. Austria is located in position 12 while Finland is in position 33.

Table 2. Travel and tourism competitiveness components: European sub-regions

		Enabling Environment				
Country/Economy	Global rank	Business environment	Safety and security	Health and hygiene	Human resource and labour market	ICT readiness
SOUTHERN EUROPE						
Spain	1	4.4	6.2	6.3	4.9	5.5
Italy	8	3.9	5.4	6.2	4.6	5.4
Portugal	14	4.6	6.3	6.3	5.2	5.2
Greece	24	4.1	5.6	6.6	4.8	4.9
Croatia	32	4.0	6.1	6.4	4.4	5.0
Malta	36	4.7	5.9	5.4	4.8	5.4
Turkey	44	4.5	4.1	5.4	4.3	4.3
Cyprus	52	4.6	5.8	5.8	4.9	4.8
Southern Europe Average		4.4	5.7	6.2	4.7	5.1
WESTERN EUROPE						
France	2	4.7	5.4	6.5	5.1	5.9
Germany	3	5.3	5.6	6.9	5.6	5.8
United Kingdom	5	5.9	5.3	5.8	5.5	6.2
Switzerland	10	6.0	6.4	6.5	5.7	6.4
Austria	12	5.0	6.3	6.7	5.5	5.8
Netherlands	17	5.5	6.1	6.2	5.5	6.1
Belgium	21	4.9	5.9	6.7	5.3	5.7
Ireland	23	5.5	6.1	5.7	5.5	5.7
Luxembourg	28	5.8	6.3	6.3	5.3	6.2
Czech Republic	39	4.5	5.9	6.7	5.0	5.6
Western Europe Average		5.3	5.9	6.4	5.4	5.9
NORTHERN EUROPE						
Norway	18	5.6	6.4	6.3	5.6	6.3
Sweden	20	5.5	6.2	6.1	5.5	6.3
Iceland	25	5.3	6.6	6.1	5.8	6.1
Denmark	31	5.5	6.1	6.1	5.7	6.4
Finland	33	5.6	6.7	6.3	5.6	6.2
Estonia	37	5.2	6.3	6.3	5.2	6.1
Latvia	54	4.6	5.8	6.4	5.0	5.3
Lithuania	56	4.6	5.7	6.8	5.0	5.5
Northern Europe Average		5.2	6.2	6.3	5.4	6.0

Colors are determined by the relative position of each score in the global distribution of each pillar, taken individually.

Source: WEF (2018).

Table 2. Travel and tourism competitiveness components: European sub-regions (continues)

Country/Economy	T&T policy and enabling conditions				Infrastructure			Natural and cultural resources	
	Prioritization of T&T	International openness	Price competitive-ness	Environmental sustainability	Air transport infrastructure	Ground and port infrastructure	Tourist service infrastructure	Natural resources	Cultural resources & business travel
SOUTHERN EUROPE									
Spain	6.9	3.9	4.5	4.6	6.0	6.2	6.7	4.9	6.9
Italy	4.6	4.1	3.9	4.6	4.4	4.7	6.0	4.8	6.6
Portugal	6.6	4.2	4.8	4.3	3.9	4.2	6.4	3.9	3.9
Greece	6.6	4.1	4.7	4.5	4.3	3.7	6.7	4.1	3.1
Croatia	4.6	4.2	4.4	4.7	3.0	3.9	6.3	4.6	2.8
Malta	6.2	4.0	4.4	4.1	3.9	4.6	6.6	3.1	1.5
Turkey	4.3	3.9	4.9	3.7	4.7	3.5	4.7	3.0	4.1
Cyprus	5.7	3.8	4.3	4.0	3.1	3.7	6.6	2.9	1.8
Southern Europe Average	5.3	4.0	4.5	4.3	4.0	4.2	5.9	3.9	3.8
WESTERN EUROPE									
France	6.1	4.2	4.1	4.8	4.9	6.6	6.7	4.8	6.7
Germany	4.8	4.3	4.2	6.2	4.9	6.8	6.0	4.0	6.3
United Kingdom	6.0	4.2	2.8	4.7	6.2	6.4	6.2	4.6	6.0
Switzerland	5.6	4.1	2.8	6.8	4.9	6.9	6.2	3.7	2.9
Austria	6.3	4.0	3.9	6.6	3.9	5.2	6.7	4.1	3.1
Netherlands	4.7	4.3	4.1	5.1	6.0	6.1	4.9	2.2	3.4
Belgium	4.5	4.1	4.4	4.6	3.7	5.7	5.3	2.2	4.1
Ireland	6.4	4.6	4.0	4.7	4.2	4.7	6.8	2.8	2.9
Luxembourg	4.8	4.3	4.6	6.5	3.6	6.6	6.9	2.7	1.7
Czech Republic	4.2	4.2	4.9	4.9	3.1	4.9	6.1	2.5	2.4
Western Europe Average	4.9	4.2	4.0	5.1	4.3	5.5	5.8	3.4	3.9
NORTHERN EUROPE									
Norway	6.2	4.0	3.7	6.6	5.3	3.5	5.4	4.1	2.2
Sweden	4.6	4.1	4.0	6.3	4.6	4.6	6.0	3.1	3.0
Iceland	6.0	4.4	3.6	4.8	4.7	4.0	6.8	3.5	1.5
Denmark	4.4	4.4	3.8	6.2	3.5	6.4	4.8	3.3	2.3
Finland	4.6	4.1	4.3	5.4	4.0	4.6	4.7	2.9	2.1
Estonia	5.5	3.7	5.1	4.9	3.0	4.4	5.5	2.4	1.6
Latvia	4.5	4.0	5.2	4.9	3.1	4.0	4.6	2.4	1.4
Lithuania	4.3	4.0	5.4	4.4	2.4	4.4	4.4	2.2	1.5
Northern Europe Average	4.9	4.1	4.4	5.1	3.8	4.4	5.0	3.0	1.9

Colors are determined by the relative position of each score in the global distribution of each pillar, taken individually.

Source: WEF (2018).

Despite the good position in the competitiveness ranking some challenges are to be tacked. For example, in Austria the participants of the focus group mentioned the following aspects:

- Subsidies are over-represented in the financial structure of the tourism industry in Austria and also in the regions.
- International investors are only seen as minor sources for financing, as efforts and guarantees that are requested are high.
- Challenges are definitely connected with the current level of interests, which are very low. If in the next 5-10 years interests increase again, then this will cause big problems and challenges when it comes to the repayments of the loans

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- Through international pricing pressures, it will become more and more difficult to generate marginal returns and own capital, which might increase difficulties when it comes to the request for loans.

Ways of promoting tourism competitiveness: the Spanish example

Spain, through the Nacional Turismo Plan (Plan National e Integral de Turismo) planned the implementation of a set of measures for the period 2012-2015 aiming at boosting competitiveness of companies and destinations, renew the global leadership for the coming decades and contribute to the generation of wealth, employment and welfare of citizens.

As a response to the tourism sector main needs, the following fundamental aspects were highlighted:

- Leadership of the Government to align wills of actors and resources in a common project.
- Public-private collaboration.
- Design of transversal policies for decision-making and the establishment of strategies.
- Establishment of a framework and institutional structure that stimulates competitive improvement in companies.
- Spain, as a touristic destination, must function in an aligned manner, with an innovative vision in the design of policies. In other words, Spain should be designed as a destination with a tourist/consumer focus.

2.1.4. Tourism development

Austria

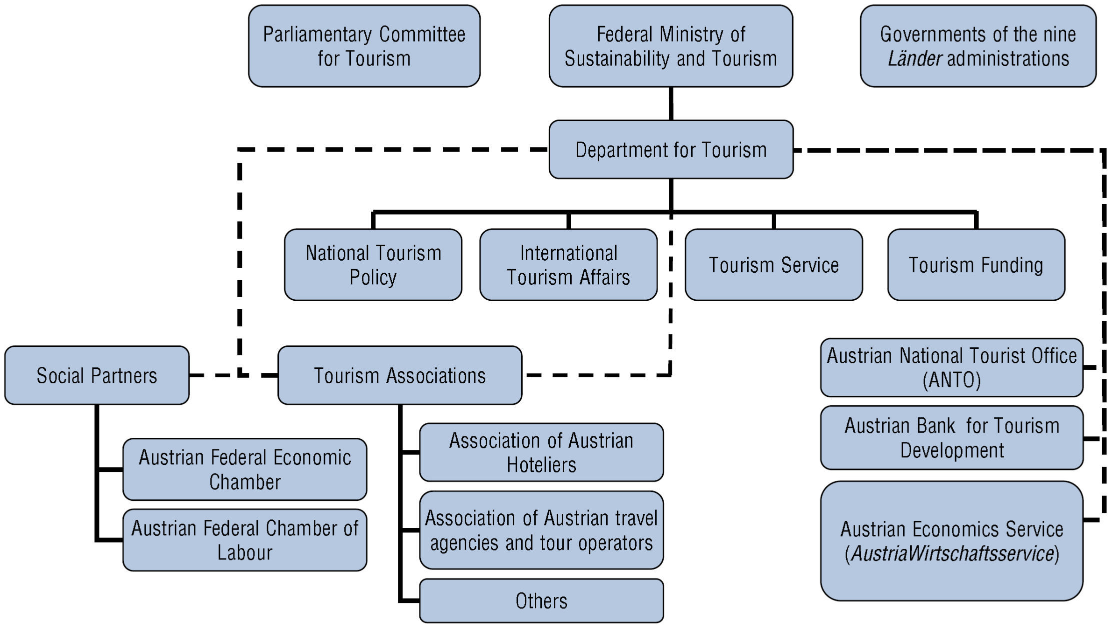
Major touristic products and services focusing on the most promising on terms of growth

There are almost all different types of touristic products and services available in different regions of Austria, but also on a national basis except of sea/beach holidays. The actual highest growth is pointed out in city, trekking and mountain bike tourism. The strategic importance needs to be laid out to health tourism because an essential future growth will be expected in this sector. One recognizable trend is the merger of two different products in one as for example the combination of mountain bike and spa tourism in one business.

Main stakeholders and actors involved in the tourism industry and responsible for strategic development

At national level, the stakeholders are the Ministry for Tourism and Sustainability and the Austrian Tourism Association (Österreich Werbung). On the regional level there is, in each province of Austria, a regional tourism association. For the development and implementation of strategies regional economic partners, regional governments and their politicians and destination managers are essential.

Figure 6. Austria: Organisational chart of tourism bodies



Source: OECD (2018).

In 2015, there were 337,400 self-employed and normally employed persons and 293,100 employees (calculated in full-time equivalents) working for the tourism industry, meaning that the portion of the whole employment is 7.5% for all the employments and 7.9% of the employments calculated in full-time equivalents. The most important sector for jobs within the tourism industry is the hotel industry with employing 172,600, or 58.9% of the full-time equivalents. Out of that portion, 61.7% of those employees are working within the area of gastronomy and 38.3% are working in hotels. Around 20% of the full-time equivalents were employed within the transportation industry, 14.8% worked for travel agencies and organizers and 7.8% worked within the cultural and entertainment sector. Therefore, by adding the indirect employees relatable to the tourism industry, there were 376,000 full time jobs within this sector in 2015. Additionally, leisure activities of Austrians generated 337,600 further jobs, which means that almost every fifth job in Austria is connected to the tourism and leisure industry (Federal Ministry of Science, 2017.).

Additionally, in the Austrian tourism sector, 57.4% of the employees are female and a growing employment of foreigners, as well as a growth in marginally employed people characterizes the Austrian tourism industry. The employment of foreigners increased by 5.8% in 2016, compared to 2015 and of the 99,173 foreign employees, 48,562 (almost 50%) came from the new EU member states like Romania, Bulgaria, etc. Furthermore, since 2008, the number of marginally employed people raised by 59% to 56,834 persons. Another characteristic of the tourism sector is the rather young personnel, as 19.1% of the employees are younger than 25 and 29.8% of the employees are younger than 45 years. The unemployed quota was with 17.7% relatively high in the tourism sector in 2016, compared to the average quota of 9.1%. The seasonality in the tourism industry has a decisive influence on unemployment regarding short periods of employment and short employment periods. In tourism, only 45.9% of the people were employed for a constant period of over one year and the average duration of unemployment was 100 days (Federal Ministry of Science, 2017).

Main strategies for tourism development

Austria is currently associated worldwide as a natural jewel and a natural country, which supports to strengthen the concept of sustainability.

Based on the key issues and challenges to be faced by the Austrian tourism, national strategic initiatives are trying to cope with them. Among these barriers it is worth mentioning: diversify core markets; co-ordinate marketing efforts; encourage investment and innovation; combat seasonality; improve accessibility and connectivity; address employment and labour market issues; coordinate the administrative and regulatory environment; and consider sustainable development and digital transformation (OECD, 2018). Therefore, actions are taken in regards to marketing, investment, quality and innovation, employment, education and training, connectivity and transport, accessibility, climate change, crowdfunding and digitalisation.

Finland

Main stakeholders and actors involved in the tourism industry and responsible for strategic development

In Finland several actors are involved in strategic development of tourism at different geographical level (Figure 7).

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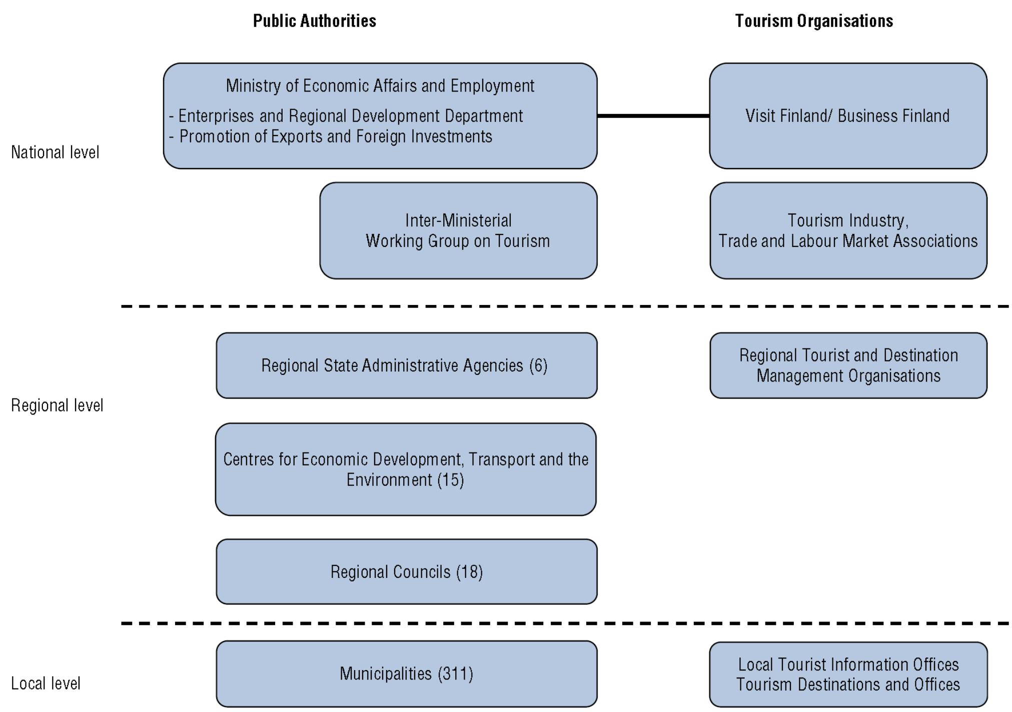
Figure 7. Finland: Organisational chart of tourism bodies



Source: OECD (2014).

Even if the actors of the public sector presented in figure 6 have the main responsibility of tourism development, the private sector is taken into decision-making as much as possible. As already stressed, Lapland and Helsinki are the two most important tourism destination in Finland, though Helsinki far ahead of Lapland. In these two regions, also the number of actors involved in the tourism development is big. Both in Lapland and in Helsinki tourism service supply (especially accommodation and restaurant sector) is partly dominated by chains. In Helsinki more international chains while in Lapland domestic chains. In Lapland the chains can own both hotels and safari companies. Especially in Lapland, the biggest part of the supplier is rather new companies, dating back e.g. 1990's. Of course, there are individual, perhaps more family-run companies that are older. Helsinki has also a few traditional tourism suppliers in the accommodation and food sectors.

Lakeland and Archipelago are characterised by small family-run businesses with sometimes a longer history in tourism business. In most of the towns in the regions national hotel chains dominate accommodation supply.

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Major touristic products and services focusing on the most promising on terms of growth

Tourism is not organised in Finland in a very structured way. Visit Finland's preferred regions (Helsinki, Archipelago, Lakeland and Lapland) don't cover all the country. There is no tourism minister or tourism ministry, nor tourism has ever had a special role in the national development. At a regional level, tourism might be noted in regional strategies, but not as something mandatory. In municipality, town and city level tourism is often seen as an important and attractive sector of service industry to develop especially as more traditional industrial activities have been in decline. Tourism brings in income, raises the service level also for local people and strengthens the brand.

Tourism services are available to some extent in most of the localities in Finland especially during the main tourism season. The year-round supply is available in towns and cities serving mainly business tourists from autumn to spring. Other localities with concentrated service supply and demand almost year-round are ski resorts in Lapland. Lapland's ski resorts have a rather long history. The first visitors came there already in 1930's especially for cross-country and downhill skiing. The service level was that time non-existent. Local farmers rented beds and catered the visitors from Southern Finland who reached resorts by train and bus. At the same time, some beach resorts on the Gulf of Finland hosted thousands of holidaymakers during the summer months of June, July and August. Their service supply was much wider and tourism history longer. Beach resorts' golden age in Finland was in the 1930's, and they lost their popularity I the 1960's after a long decline. Spain, Italy and other Mediterranean destinations replaced the national resorts. Ski resorts development was the opposite. The service level in them started to rise in the 1970's and 1980's along with Finnish visitors.

Ski resorts in Lapland are perhaps the only resorts that approach destinations in Finland with a covering service supply of international quality and individual brands. When talking about tourism destinations in Finland with a brand, Helsinki is, of course in the list. The first international winter tourists came to Lapland in 1980's and the flow has grown since. Now, there are direct charter and regular flight routes from several European cities to various airports in Lapland. Helsinki airport is as well an important hub of flights to Lapland especially for tourists coming from Asian countries.

Ski resorts in Lapland offer accommodation from hostels to five-star villas. The restaurant supply is from hamburger restaurants to fine dining. Activities like reindeer and husky safaris are popular. Ski tracks and ski slopes are kept open from early November until early May. Shops, super markets, spas, beauty parlours, gyms, event halls, night clubs, to name a few are available in ski resorts far away from bigger towns and cities. The ski resorts serve also local people who otherwise should look for them much further away. It is hard to find in Finland other resorts outside towns and cities with as high service supply as in Lapland's ski resorts.

The roadmap for tourism development 2015-2025 is stressing cooperation, i.e. "Achieving more together" and its strategic focus areas are:

(1) Strengthening the theme-based collaboration of tourism centres and networks of tourism related companies, as well as new openings in product development, sales, and marketing
(2) Developing competitive and versatile offerings from the interfaces of tourism and other fields.
(3) Increasing the effectiveness of marketing activities and making the travel services offering easier to buy
(4) A competitive operational environment for tourism that supports growth and renewal.

During 2015-2018, the Ministry of Employment and the Economy has supported three thematic product development programmes, considered as strategic focus areas of the roadmap.

1. Finrelax – Turning Finland into a top country of wellbeing tourism
   It is a development programme with focus on wellbeing tourism product development. Wellbeing products in Finland are based on pure nature and air, which requires a special sustainable code of conduct[3].
2. Making the Finnish archipelago internationally known
   The emphasis of the second development programme has been on marketing and sales of Finnish archipelago. It's a unique destination with nature and culture based products.
3. Stopover FINLAND – making Finland a leading stopover country
   SopOver Finland –development programme, aims to build Finland an attractive stopover destination for international tourists travelling via Helsinki airport. Helsinki airport is already a hub between Asia and Europe, thanks to on Finnair's business strategy. Creating appealing tourism services from a few hours' stay to a few days' stay in Finland, tourism income growth would be remarkable.

These programmes were executed by Visit Finland.

Main strategies for tourism development

In Lapland, Lakeland and Archipelago tourism development is in the hands of local development agencies and regional councils. Furthermore, universities and especially universities of applied sciences join actively in the development work. The role of the companies varies. Sometimes the domestic hotel chains are not that interested in the development work, because they are centrally steered with the headquarters in Helsinki. The same applies also to the units of international chains. The participation of individual companies and entrepreneurs depend always their attitude to co-operation and joint development work. In Helsinki, tourism development is mainly in the hands of region's municipal tourism offices and development agencies. Units of international service chains are not always that interested in the work.

The organisation responsible for the Finnish tourism brand is VisitFinland. VisitFinland works to develop Finland's image as a destination and helps Finnish travel companies to internationalize as

[3] Examples of products are available at https://www.visitfinland.com/finrelax/

well as to develop, sell and market high-quality travel products. VisitFinland cooperates with travel destination regions, businesses in the travel industry and other export promoters and embassies. Visit Finland is part of Business Finland. VisitFinland works closely with ministries, travel businesses, transport companies and Finnish regions. This cooperation involves research, product development and, above all, marketing of leisure tourism to Finland from abroad." (VisitFinland, 2018).

Visit Finland is responsible for the tourism strategy, the current in Finland referred to as the tourism road map 2015-2025. The road map summarises a joint vision, mission and key strategies to reach them for Finnish tourism. Even though Finland's tourism pull factors are mostly related to nature and culture, sustainability is not emphasised in the road map. The key focus is on strengthening business networks, development of interesting supply, marketing actions and creation of a competitive operational environment. Finland's strengths in the road map are listed as following: unpolluted nature, circumstances enhancing wellbeing, original culture and functional infrastructure. Experiential and interesting tourism supply includes themes like Outdoors Finland, Culture Finland, water tourism, wellness and health services, physical exercises and sports, food production, national parks and culture heritage. As already stated sustainability is not any key issue in the road map even if most tourism products in focus for development are strongly dependent on the physical environment, the road map only highlights that Finland must improve the knowhow in sustainable tourism including sustainable business models. As Finland's tourism's road map is a long-term work paper, it allows Visit Finland and other stakeholders to elaborate it during the strategy period of 10 years.

Visit Finland as the main DMO categorizes Finland to four different tourism regions. The four regions are Lapland, Lakeland, Helsinki and Archipelago. All the four regions have their own profiles, partly own season, customers and tourism supply.

Lapland is in numbers the second tourism region in Finland after Helsinki (-Uusimaa region). Lapland is a destination for both domestic and international visitors. It has two main and two shoulder seasons. Winter and summer are the main seasons and autumn and spring the shoulder seasons. Winter season offers tourists nature-based activities like cross-country and down-hill skiing, reindeer and Husky safaris and Northern lights. Snow season continues until the middle of May especially in the ski resorts in the north of the region. Summer is for hiking, sightseeing, fishing, canoeing and midnight sun. Additionally, it is also consider autumn for hiking and autumn foliage. International tourists come to Lapland from all over the world, but the most important visitor groups are from UK, Russia, Germany, France, Japan and China. Especially British tourists use package holidays when coming to Finland.

Helsinki or Helsinki-Uusimaa region is an all-year around destination with a peak in the summer. As Helsinki is the largest city in the country, it is a business tourism destination. Its attractions are culture-based. Helsinki is also a popular event destination with the biggest universities in Finland. On the top of culture, Helsinki offers urban wilderness, food, street and nightlife and shopping. Visitors are domestic and international, especially from neighbouring countries, Europe and Far East.

Lakeland is a traditional tourism region is Finland with only one main season – summer. In summer, the visitors are domestic and Germans, Russians and more Chinese. Finnish visitors stay a lot in the own summer houses/cottages (second homes). The service supply can be partly limited, and the attractions are nature and lake-based. Furthermore, small towns and villages and their culture supply and way of living attract visitors.

Archipelago is a new destination for international visitors in Finland. It also has one and very short season: summer. Archipelago has traditionally been a destination for domestic visitors with own summerhouses and sailing or motorboats. Archipelago attracts also bikers and motor bikers and smaller groups in coaches. The service supply and accessibility of the archipelago is limited; thus, it can't host mass tourism. Germans and Swedish visitors have found archipelago for summer breaks.

Finland's most popular tourism regions/destinations are Helsinki-Uusimaa region and Lapland. Helsinki-Uusimaa region is more important in number of visitors and tourism income. Lapland builds well the country brand with Santa Claus, Northern Lights, Sami culture, snow and winter. Both regions emphasise sustainability in their tourism strategies.

The starting point of tourism development in Lapland is the sustainable and responsible utilisation arctic nature and culture. It is also a linked to Finland's arctic strategy and the competitiveness of arctic tourism. Lapland's tourism vision in 2025 is: Lapland is a vital, international, easily accessible and all year around destination. The values in Lapland's tourism strategy are sustainable and responsible business, innovativeness and hospitality. Sustainable and responsible business is interpreted as living saving resources and in nature's terms. People respect nature and culture and understand their importance as competitive advantage in tourism. Tourism development is based on social, cultural, ecological and economic sustainability. Tourism as an industry emphasises energy saving, material efficiency, heating solutions, waste management, local food and follow-up of coal footprint. Lappish identity and arctic circumstances give ideas to experiential and international service innovations and profitable business models. Crucial elements in Lappish hospitality are nature and people. Lappish people are open and honest and eager to help. The strategies to reach the vision are accessibility, product development and marketing. Accessibility means smooth and in price competitive transport connections to Lapland by air and by land. In product development Lapland offers diverse and internationally attractive tourism products and services all year around. In marketing Lapland has already a strong tourism image. It is seen as an attractive tourism destination in current and new target regions.

Helsinki-Uusimaa region is by far the most visited region in Finland. It is also the economic engine and the home region of the capital of the country. The further development of the region will be based on economic, ecological, social and cultural sustainability. The strategic focuses are healthy and capable people, successful and responsible business and climate savvy and diverse region. For the first time, Helsinki-Uusimaa region includes tourism in its strategic programme (Helsinki-Uusimaa programme 2.0 – 2018-2021). Tourism is emphasised in climate savvy and diverse region strategic focus. The aim linked to tourism is experiences and care from nature. Helsinki-Uusimaa region as an urban environment looks forward to conserving the rich and versatile nature in the region. Furthermore, the management of man-made green areas like parks and gardens is vital for the well-being of the inhabitants: green areas have positive impacts in health and quality of living. Green areas strengthen the attractiveness of the region among new inhabitants, businesses and tourists. Advantages of future tourism are e.g. nature-based and experience trips. Nature, architecture, and UNESCO's world heritage sights tempt international visitors to Helsinki-Uusimaa region. The forest area and archipelago surrounding the capital area is developed to a well-known whole that serves inhabitants, tourists and entrepreneurs in a sustainable way.

Spain

Major touristic products and services focusing on the most promising on terms of growth

- Leisure tourism (sun, sea and sand)

Historically, leisure tourism has been the engine of the Spanish tourisms´ leading position at world tourism. The evolution of this type of tourism will undoubtedly be determined by its ability to adapt to the new demands and enhance its sustainability. It seems to be a mature service given its age, the continued growth of the supply -provoking the congestion of certain destinations-, the emergence of new competing countries with a competitive leisure product and, finally, the development of residential tourism linked to the real estate development of recent years.

- Golf tourism

Spain is the main European tourist destination for golf, with a market share of around 35% - well ahead of the closest competitor, Portugal. The golf tourism market in Europe represents some 1.6 million trips per year, of which more than half have an international character. It is possible to foresee a significant increase in competition in this segment where sun and beach competitors are making a decided bet favoured by the improvement of accessibility to destinations.

- Nautical tourism

This product includes different types of nautical activities (sailing, cruising, windsurfing, jet skis, etc.). Nautical tourism is one of the fastest growing Spanish tourism segments in recent years, increasing the number of registered vessels, as well as moorings and marinas steadily year after year. It is a segment with strong competition, in which Spain, except for certain very specific destinations, is not well positioned internationally. The greatest sensitivity of society for environmental issues and problems is also applicable to nautical tourism.

- Health and wellness tourism

Health and wellness tourism is at a time of growth, where the inaugurations and reopening of these establishments do not stop happening, be they spas or thermal stations, thalassotherapy centers or SPA. One of the opportunities that are opened for its development is the configuration of a combined offer associated with tourism for meetings, congresses and incentives.

- Rural and active tourism

The development of rural tourism in recent years has been spectacular and has mobilized and boosted a significant number of destinations. We must not lose sight of the quality-price (value for money), since the competitive environment is important.

Main stakeholders and actors involved in the tourism industry and responsible for strategic development

As figure 8 suggests, tourism comes under the Ministry of Energy, Tourism and Digital Agenda through the offices of the State Secretariat for Tourism, which is in charge of defining, developing, coordinating and implementing national tourism policy, as well as institutional relations at national and international level.

The Spanish Tourism Institute (*Turespaña*) is the administrative unit of central government responsible of promoting Spain abroad as a tourism destination operating in the following areas:

- Planning, developing and carrying out activities aimed at promoting Spain as a tourism destination in international markets.
- Supporting the marketing of Spanish tourism products abroad in co-operation with regional and local authorities and the private sector.
- Undertaking research to determine the different influences on tourism, gathering statistical information and data on the tourism sector, and creating, disseminating and co-coordinating knowledge and intelligence on tourism generated by the various administrative units.
- Establishing the strategy, plan of action and investments for new Spanish paradors (*Paradores de Turismo de España*).

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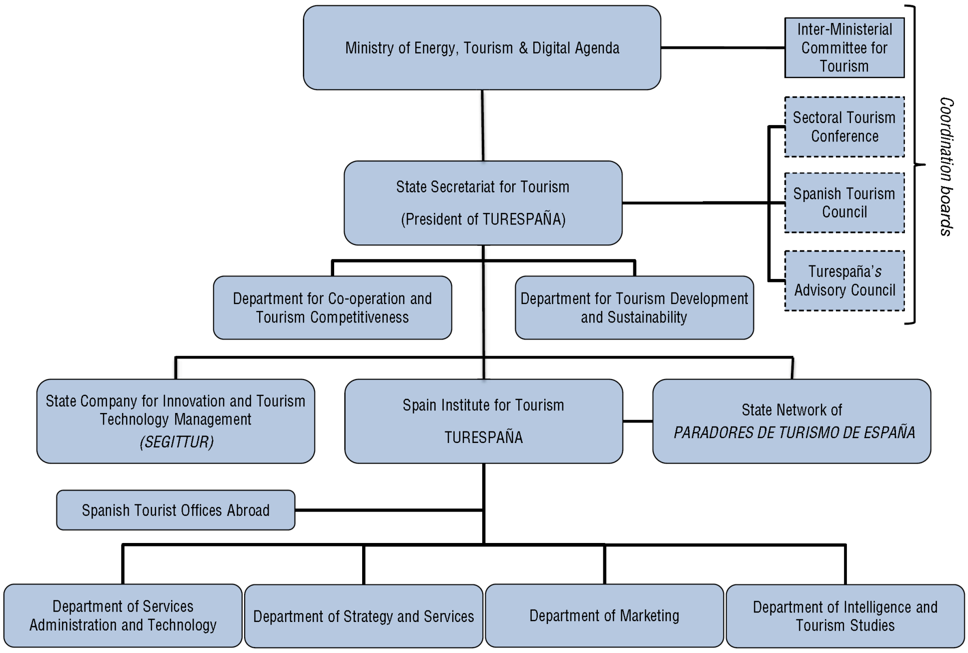
Figure 8. Organisational chart of Spanish tourism bodies



Source: OECD (2018).

Within the 17 autonomous regions and the 2 autonomous cities, regional governments are responsible for the promotion and regulation of tourism within their own territories. Moreover, local entities (provinces and municipalities) manage their own tourism interests at the local level, mainly in terms of promotion and dissemination of information. Additionally, and mainly in the main cities, the *Patronato de Turismo* is another important body, which supports the private sector in their commercial strategies to attract congresses and fairs. The *Paradores de Turismo de España* is a public company under the control of the Spanish Tourism Institute, whose principal function is the management and operation of state-owned properties – mostly historic buildings that have been purpose-adapted as hotels.

Main strategies for tourism development

Spanish tourism development has historically focused on the exploitation of the resource sun, sea and sand and beach in certain municipalities and at certain times of the year. This entails a specific problem in the sustainability of the destinations, derived from the overload in the infrastructures and in the rendering of services of the mentioned municipalities in high season.

The sustainability of tourist destinations must be ensured first of all from their planning. Based on the Agenda 21 of sustainable tourism designed by the European Union to help the planners of the local entities to know the current situation of their development model tourism, to apply monitoring indicators and to design tourism action plans sustainable that include communication actions of these attributes.

The Agenda 21 for sustainable tourism for local entities identifies the variables or attributes that affect the sustainability of a destination (in a triple environmental dimension, economic and social), so it can be used to infer the variables on which create a "status of sustainable tourism municipality", and on these apply a new model of tourism management and management that will facilitate their economic growth and development.

In this area, the participation and support of other public administrations is essential, for this, collaboration formulas were established by all administrations.

In fact, the Spanish tourism development strategy is based on sustainability, innovation and knowledge, digitalisation, specialisation and quality. Via sustainability, it is expected to achieve better returns due to an increased quality of tourists´ experience and longer stays. Morover, sustainable tourism request greater innovation in the use of data, digitalisation and "Smart" tourism destinations.

Under the increased relevance of digitalisation in the overall tourism chain, public sector in cooperation with private and international organisation look after increasing awareness and collaboration on this topics between stakeholders. An example would be the "Smart Destinations" project promoted by the Ministry (through SEGITTUR), aiming to improve the position of Spain as a world tourism destination based on innovation, sustainability and competitiveness.

2.2. Sustainable tourism in Europe

2.2.1. Enough tourists?

Despite the fact that tourism is expected to have a positive effect on the economy, it was already demonstrated that in many developed economies it started to exert a negative effect (see Brida et all. 2016, among others). Why? Because these positive effects are not coming for free, but at a cost. One of the major costs is the environmental pressure. It is estimated that the contribution of tourism to the greenhouse gas emissions is about 5% and it is expected to increase in the following years (Gössling et al., 2013).

Overtourism or even the risk of it is a major concern in many destinations due to the physical degradation of many natural and historical wonders (many of them located in both developed and developing countries)[4]. In Europe, residents of cities like Barcelona, Rome and Amsterdam, have begun their streets protest as a consequence of experiencing serious negative effects coming from tourism and overtourism (e.g., huge increase of local rental prices, congestion and air quality).

[4] This would be also de case of Thailand's Koh Tachai Island. The physical degradation is leading to the indefinite closure to visitors

Thus, it is no mystery why promoting sustainable tourism is among the priorities of international organisations leading global efforts against climate change. The United Nations, for example, has designated 2017 as the International Year of Sustainable Tourism for Development[5].

In this line, coordination in ST is taking place at international levels, including by NGOs and industry bodies, to advance the adoption of sustainable practices in tourism (The Economist Intelligence Unit Limited 2017). Individual destinations and tourism operators, often with the help of domestic NGOs and industry bodies, are achieving basic results and in some cases by multinational businesses. In most countries, however, there is a gap at the national level, and government-level efforts in policymaking and implementation thus far tend to be fragmented and inconsistent.

At European level, in 2007 the EU launched the Commission Communication, '[Agenda for a sustainable and competitive European tourism]' and recommended the use of the following principles to address these challenges:

- ✓ Taking a holistic, integrated approach;
- ✓ Planning for the long term;
- ✓ Adopting an appropriate pace of development;
- ✓ Involving all stakeholders;
- ✓ Using the best available knowledge;
- ✓ Minimising and managing risk;
- ✓ Reflecting impacts in costs;
- ✓ Setting and respecting limits;
- ✓ Practising continuous monitoring.

Promoting models of sustainable tourism management in the European Union: EDEN (European Destinations of Excellence)

EDEN, launched by the European Commission in 2006, works as a network of exchanges of good practices between different regions of Europe.

The project is based on national competitions taking into consideration as one of the main objectives the values, diversity and common characteristics of European tourist destinations. The European Commission selects a different theme every year for this competition. Since 2012 the initiative is biannual, combining standard editions and variable themes with campaigns of reflection and recognition that reinforce it.

This initiative has also become a tool to share best practices in Europe. More info at https://ec.europa.eu/growth/sectors/tourism/eden/about/network_en

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[5] Additional details available in the UN's Sustainable Development Goals, published in 2015 (see "Tourism and the SDGs", http://icr.unwto.org/content/tourism-and-sdgs).

From a more general view, The Economist has developed the Sustainable Tourism Index that assesses countries on their commitment to develop and promote sustainable practices in the tourism industry. The STI is an index composed of 19 quantitative and qualitative indicators. These fall into five thematic categories: political and regulatory environment; environmental sustainability; socio-cultural sustainability; economic sustainability; and travel and tourism industry. Each of the ten countries in the index is scored across these five categories. The categories, and the indicators within them, are weighted according to our assumptions of their relative importance in supporting the development of sustainable tourism practices in these countries.

The actors involved in sustainable tourism are numerous and varied. They include large and small tourism companies, tourism boards and agencies, the entire hospitality industry and the suppliers that support it, transportation companies, host communities, local and international NGOs, industry and environmental standards bodies, government at all levels, and, of course, tourists themselves. Almost any sustainable tourism initiative will involve several of these stakeholders. Individual destinations or companies will most likely have been guided by established standards or advised by an NGO or government agency and have undergone discussion with local suppliers and communities. The effective pursuit of sustainable tourism initiatives therefore requires a large degree of co-ordination between the private and public sectors as well as civil society. Isolated or single-actor initiatives can be impactful at a local level, but many experts believe that wider success, particularly at the national level, requires some degree of management or coordination of sustainability efforts within their tourism industries and among their tourist destinations. That starts, but does not end, with the development of a policy framework, which then must be accompanied by the development of private sector business models that foster and benefit from the pursuit of sustainable practices. Managed well, sustainable tourism initiatives can deliver benefits to all stakeholders, at national, regional and local levels. These can take the form of conservation of environmental".

The European Commission, in collaboration with the half-yearly Presidency of the Council, organizes the so-called European Tourism Forum once a year. Currently after twelve editions, the ETF, according to its acronym in English, acts as a forum-platform for the exchange of experiences and mutual learning in order to promote alternative tourism destinations that reinforce the competitive and sustainable dimension of tourism in Europe. It is one of the most important initiatives promoted by the European Commission as it welcomes and involves most of the players in the sector.

In 2013, the XII edition of the ETF took place on October 17 and 18 in Vilnius, Lithuania.

The Forum was developed under the theme "Tourism, a force for economic growth, social change and well-being". Priority issues of the host country were discussed, such as the Baltic Sea strategy, (priority of the Lithuanian Presidency), and also more global issues, such as the impact of tourism on the economy of the Union.

At the same time, in an informal meeting, the European Ministers of Tourism addressed three issues in relation to the generic community objective of guaranteeing job creation and economic prosperity in this sector:

- Simplification of the processing of short-term visas to attract more tourists from the so-called emerging economies;
- Strengthen high level tourism, which can increase occupancy in low and medium seasons;

As in the Forum itself, align future tourism initiatives with the priorities established in the new European financial period 2014-2020 to guarantee financing and boost growth and competitiveness in this sector.

The ETF always serves as a platform for the exchange of experiences and best practices, to discuss the challenges and opportunities of the sector, as well as to reflect on the changes and the future perspective of the actors involved.

The Economist Intelligent Unit - STI 2017 highlighted that developed countries have intervened more than emerging ones in formulating policy, foster adherence to recognised standards, encourage travel and tourism businesses to reduce their environmental footprint, coordinate efforts with NGOs and the private sector, and ensure protection of their cultural and historical assets. This might be, among others, due to the economic development level (raw materials and basic necessities are no longer the key for increasing their competitiveness and thus, their growth), availability of more funds, the higher interest for fighting against the climate change and protecting the environment. As a consequence, European countries lead the index not just overall, but also in most domains.

Within the same study, The Economist identified the following main challenges for sustainable tourism:

- ✓ Preserving natural and cultural resources;
- ✓ Limiting negative impacts at tourist destinations, including the use of natural resources and waste production;
- ✓ Promoting the wellbeing of the local community;
- ✓ Reducing the seasonality of demand;
- ✓ Limiting the environmental impact of tourism-related transport;
- ✓ Making tourism accessible to all;

- ✓ Improving the quality of tourism jobs.

2.2.2. Financial funding of tourism projects

Support to tourism businesses

The quality of the tourism services is a constant priority of the EU, with a leading position as a tourist destination. Therefore, the European Commission is involved in initiatives that improve the skills and mobility of workers, particularly by engaging in global digital networks and helping tourism entrepreneurs manage their businesses without forgetting the sustainable dimension.

With a great presence of small and medium enterprises, the Commission tries to support especially small businesses in the tourism sector through a range of initiatives by supporting them to:

- Access digital technologies and use of ICT tools[6] is a priority area for the Commission given the huge impact on the sector. Thus, the Commission, focused on digital tourism, has implemented several actions to boost the competitiveness of small businesses in the European tourism sector, integrate them into global digital value chains, and improve their ability to create more jobs.
- Increase the receptiveness of education and training to labour market needs and help entrepreneurs achieve and expand the necessary skills to run their. With this aim, the Commission is focusing on:
    - How to continuously improve the quality and mobility of its staff in order to provide top quality, personalised services to all tourists[7] in order to maintain Europe's leading position among the world's tourism destinations.
    - Providing practical, up-to-date information on digital technologies and innovative business practices. All of them can be easily applied when setting up, managing, promoting and expanding a tourism business. This would be the main reason of launching the Tourism Business Portal[8].

Special attention is also paid to cultural heritage within the tourism industry mainly through the Enterprise Europe Network[9], but also to taxation in tourism[10].

[6] More details available at https://ec.europa.eu/growth/sectors/tourism/support-business/digital_en
[7] More details available at https://ec.europa.eu/growth/sectors/tourism/support-business/skills_en
[8] More details available at https://ec.europa.eu/growth/sectors/tourism/business-portal_en
[9] More details available at https://ec.europa.eu/growth/sectors/tourism/support-business/een_en
[10] More details available at https://ec.europa.eu/growth/content/study-impact-taxes-competitiveness-european-tourism-eu-tourism-tax-tool_en

Guide on EU funding for the tourism sector

The European Commission developed periodically, according to the period of the EU budget, a guide on EU funding for the tourism sector gathering information on sources of EU funding of interest to the European tourism industry from both private and public sector.

The latest version (version 3, April 2016), based on the budget covering the period 2014-2020[11], comes with updated hyperlinks, new information on financial instruments (including the European Fund for Strategic Investments, i.e., EFSI[12]) and additional examples of recently selected projects. The main aspects detailed in the guide are linked to practical questions such as:

- Which actions are supported?
- What kind of funding is available?
- Who can apply and how?

The table bellow summarize who can apply for what funding and action.

[11] More details available at https://publications.europa.eu/en/publication-detail/-/publication/e0707433-aa5f-11e6-aab7-01aa75ed71a1
[12] More details available at https://www.eib.org/en/efsi/index.htm

Table 3. EU funding for tourism industry

	All	All in rural areas	All legal persons	All legal persons in labour market, education, training	LAG	All legal persons in coastal and inland areas	All legal persons in cult. And creative sectors	Public authorities employment services	Cities	SME	Social enterprises	Entrepreneurs	Higher education / Professional schools	Social partners	Natural persons
EFSI	x														
ERDF			x												
CF			x												
ESF				x											
EAFRD		x			x										
EMFF						x									
LIFE projects			x												
LIFE – NCFF			x												
LIFE – PF4										x					
H2020 - MSCA	x														
H2020 – LEIT	x														
H2020 – Reflective	x														
H2020 – SME instr.										x					
COSME – access										x					
COSME - Tourism			x												
COSME – EfE												x			
CEP – TCP							x								

Source: EC (2017).

Table 3. EU funding for tourism industry (continues)

	All	All in rural areas	All legal persons	All legal persons in labour market, education, training	LAG	All legal persons in coastal and inland areas	All legal persons in cult. And creative sectors	Public authorities employment services	Cities	SME	Social enterprises	Entrepreneurs	Higher education / Professional schools	Social partners	Natural persons
CEP – Eur. networks							x								
CEP – ECOC									x						
ERASMUS + mobility													x		
ERASMUS + masters			x										x		
ERASMUS + others			x												
EaSI - Progress								x					x	x	
EaSI – EURES								x		x					x
EaSI - financial										x	x	x			x

Source: EC (2017).

It also points at projects already funded as a source of inspiration.

Austria

Governmental subsidies are on national and regional base. In 2016, for example, the national tourism budget reached 52 million €, almost 43% of which was allocated to the financial support of SMEs under the supervision of the Austrian Bank for Tourism Development. Around half of this was dedicated to the annual budget of Austrian National Tourism Office, the remaining amount was employed for individual subsidies for co-financing tourism projects. Other 77.8 million € came from the European Recovery Programme funds and were used for loans to SMEs in the tourism industry (OECD, 2018).

Apart from the national budget, all nine Länder have their own tourism budgets in order to support their specific tourism development programmes.

Additionally, different banks have high willingness to hand out loans for tourism projects.

Innovations Million subsidy in Austria

Aiming at innovating in tourism, Austria introduced from 2012, on a biannual bases, awards for innovative best practice under a specific topic, with project financial support for the winner. Moreover, workshops on product innovation are organised by the Austrian National Tourism Organisation. Furthermore, increased subsidies are available for innovation, e.g., the Innovations Million which supports innovative flagship tourism projects based on stakeholder cooperation at destination level. For this subsidy, as its name states, one million euros yearly budget is available. A call for proposals and a jury of experts decides which projects will be awarded and, thus, funding for product development, distribution and communications.

Source: www.bmwfj.gv.at/Tourismus/Tourismusfoerderung/Seiten/Innovationsmillion.aspx retrived from OECD(2014).

Finland

Subsidies given from national and regional governments are still an important source of money for the majority of stakeholders. For example, in Finland, Business Finland programmes and direct grants provided by ministries are playing a relevant role.

Moreover, the European Regional Development Fund (ERDF), European Social Fund (ESF), European Agricultural Fund for Rural Development (EAFRD) confirms another source for the development of the tourism industry.

Public subsidies granted for tourism-related projects between 2007 and 2013 totalled about EUR 500 million. Business subsidies accounted for more than a quarter of this one third went to such purposes as product development, while the rest was allocated to the development of services and infrastructure supporting tourism. The public subsidies granted to tourism are roughly equal to the proportion of the tourism cluster of the GDP (TEM 2018).

The availability of public funding for tourism projects and availability of stable banking sector offering loans to the private tourism companies for starting a business respective business expansion is rather good. So far innovative funding sources have been tried only a few times in the tourism sector. A couple of tourism companies have though raised money by crowdsourcing on the internet and a few tourism related start-ups have managed to get funding by attending the Technology and the start-up conference Slush.

To these sources, a temporal one is playing a relevant role: bank loans. Why? Given the low interest rates under a context of expansive monetary policy applied within the Euro zone by the European Central Bank as a consequence of the recent economic crisis and it´s still slow recovery. But this is not going to last for the next decades. Thus, it is not a reliable source for funding tourism projects in the following years except if the conditions offered by the banks are favourable enough.

Spain

Spain has designed a special plan for the promotion of sustainable tourism. The actions that have been carried out from the public administration with a special focus energy efficiency. Cost savings through energy efficiency and raising private investments are in the spotlight.

On the other hand, there is a growing demand from certain segments of outbound markets, which places great importance on the choice of their destination to the attributes regarding the environment identified as eco-intelligent consumers or LOHAS[13], for whom it is critical that the offer responds to their demands and that the brand that accredits it is reliable.

The Secretary of State for Tourism, through *Turespaña*, designed a set of measures that affect the structuring of sustainable supply. For this reason, the knowledge of these segments in origin markets and its ability to access the main customers of this type of product are essential.

Additionally, the need of involving practitioners in the reduction of waste generation and waste management is underlined.

Some specific actions are detailed bellow:

- Identify and select existing certification systems and brands in the environmentally sustainable tourism market to support those that are most adapt with the Turespaña strategy and comply with a minimum level of product standard.
- Study the feasibility and define a system of indicators through the EIT for the certification systems that allow for a reliable and operational measurement of both the CO2 footprint in tourism as its reduction resulting from the application of the systems of certification.
- Establish a favourable framework for the market of companies associated with the compensation of CO_2 footprint by promoting business models that establish ties with the tourism sector.
- Prepare demand studies for a sustainable tourism product with the environment, from the point of view of identification and segmentation of demand, channels preferred for the purchase, main actors of commercialization in origin, attributes more demanded in the offer, etc.
- Encourage the international promotion of the destinations and certified tourist resources with the help using all communication channels of Turespaña: online reservation of spaces, assistance to fairs organized by Turespaña, intermediation and access to traders at source, etc.
- Awareness actions for tourists, in collaboration with the authorities competent authorities, to avoid the abandonment of waste in the natural environment, monuments, leisure areas, environments, transport stations and infrastructures, urban environment in general; properly

[13] Lifestyles of Health and Sustainability (retrived at https://www.lohas.se/wp-content/uploads/2015/07/ErnstYoung-Studie-2008_ey_LOHAS_e.pdf).

separate the different types of waste in the appropriate containers; and prevent the generation of waste, among others.

Therefore, a grant initiative was introduced recently by the Ministry of Energy, Tourism and the Digital Agenda, which allocates 60 million € aiming to boost digitalisation and energy efficiency via ICT usage in local tourism destinations. The first open call for proposals established financing of up to a maximum of 6 million € per project, with co-participation from each firm of about 20-40% of the requested funding amount. The European Regional Development Fund is behind this initiative.

Smart Destinations Project in Spain

A Smart Destination is an innovative tourist destination using state-of-the-art technology for the sustainable development of a tourist area, accessible to everyone, that facilitates the visitors' interaction with and integration into their surroundings, increases the quality of the experience at the destination while also improving the quality of life of its residents.

The Spanish Secretariat of State for Tourism, through SEGITTUR (a state owned company responsible for promoting research and development for innovation and new technologies in the Spanish tourism industry) has developed and promoted this initiative for improving the position of Spain as a world tourism destination via fosters innovation, sustainability and competitiveness at a local level through the development and deployment of ICT with the aim of creating differentiated and highly competitive services.

Destinations seeking to become SDs must implement a strategy aimed at increasing competitiveness through more sustainable use of their natural and cultural attractions, the creation of additional innovative resources, and improvements in the efficiency of their production and distribution processes. Issues considered as part of the Smart

Destinations initiative include, ensuring sustainable development, managing the carrying capacity of destinations, contributing to the seasonal and territorial distribution of tourism flows, increasing profitability, ensuring that residents share in the wealth generated by the tourist activity, and increasing tourist satisfaction.

On the way to becoming a Smart Destination, stakeholders are confronted with vast challenges and possibilities which need to be carefully considered, prioritised and selected. Geo-referenced data, Big Data, the Internet of Things, Open Data and many other data-related sources and concepts represent fundamental elements for the transition towards more intelligent, sustainable and competitive tourist destinations that meet the needs of all stakeholders involved (www.segittur.es/en/inicio/index.html).

Source: OECD (2018)

Moreover, in 2017 the Spanish Institute for Official Credit and the Spanish Institute for Diversification and Energy Saving launched a biannual line of subsidies for energy efficiency in accommodation subsector allocating a budget of 30 million €.

However, the national budget for 2016 for the Spanish Secretariat for Tourism reached 332.9 million €, but funds are also coming from the 17 Autonomous Regions and local administrations which also contribute significantly to the overall expenditure on tourism.

2.2.3. Towards sustainable tourism strategies

Aiming at designing, implementing and improving sustainable tourism strategies, a SWOT analysis was carried out by each partner institution involved in the project.

Austria

As a first step in analysing the way toward sustainable tourism strategies, it is necessary to have a clear view of the SWOT analysis carried out during the focus group. As such, the table bellow depicts the main aspects in this regard.

Co-funded by the
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Table 4. SWOT analysis of Austrian tourism industry

Strengths	*Weaknesses*
• High perceived security standards and general high perceived safety feeling • Travel and tourism industry as a central factor of the economy • High level of touristic infrastructure and services • Austria currently being associated worldwide as natural jewel and natural country; supports to strengthen the concept of sustainability; environment perceived as intact/stable • Open country to new developments although slow in the implementation – perceived as internationally open • Little number of hotel groups with expanded offerings • High level of infrastructure available (transport, social and economic) – especially important is the new focus of e-mobility concepts in some regions	• Missing overall traffic concept for different regions (not including main cities) • Missing matching among different regions for regional tourism development (intraregional matching) • When focusing on sustainable tourism, Austria actually has a problem with using natural resources such as water and also energy inefficiently, especially for winter tourism and snow production • High attention is paid to reducing prices to overtake competition which does not follow the concept of sustainability: However, a slight change in thinking is coming up • Structures within the tourism industry are only partly perceived as inflexible especially when it comes to new developments and marketing efforts
Opportunities	***Threats***
• Customers and individual companies are slowly changing their awareness towards eco-friendly and sustainable concepts, but this can only happen as long as customers are aware of the concepts and value them. An increase can be seen here. • Youth and potential future employees of the tourism industry are susceptible to these new concepts and developments and can create substantial change in the future • Tourism as central economic factor which can be used creating a good reputation on an international basis for further branches of the economy • Investments in the transportation infrastructure, especially in the rural areas – e-mobility concepts can support • Current safety situation worldwide offers a great chance to increase the reputation of Austria in the international tourism industry • Focus on natural assets, mountains, water and health brings a great chance to the Austrian tourism industry as new tourism products and services	• The majority of the customers being currently aware and valuing the concept of sustainability in tourism are people representing the upper middle class and the high price segment which means that the number of tourist which can be attracted in the future is rather small. Therefore, it is essential to work on the weaknesses and the chances to increase the strength of implementation in Austria when it comes to sustainability in tourism. • Mass tourism was also identified as threat of the national and also regional tourism industry – stakeholders need to make sure that private tours/tourisms stays the focus • Competitive atmosphere among the most important organisations might endanger the further development of the tourism industry

Source: experts who participated in the focus groups organized under the TOURIST Erasmus + project

The forest cover changes in Austria are alarming as well as the baseline water resources according to the "Travel and Tourism Competitive Index". To implement sustainable tourism strategies environmental imbalances, need to be eliminated first. Additionally, the Ministry of Tourism and Sustainability needs to communicate a clearly structured strategy for the whole tourism sector in Austria and more innovative thinkers like Dr. Christian Baumgartner, Professor for sustainable tourism at the Danube University Krems and consulter for sustainable tourism development ("Response and Ability"), and Michaela Reiterer, president of the Austrian Hotel Union, to make sustainable tourism more popular. For the practical implementation and as an incentive for businesses in the tourism sector there should be subsidies for sustainable tourism concepts. To contemplate a better competition in the tourism industry a modification of the tax system would be effective.

Finland

Finland is still one of the most environmentally sustainable countries (5th) in the world. Finland is number 5 in the world in sustainability of travel and tourism industry development. It has been a process long overdue, with other Nordic countries taking faster steps. As Finland is a country that adheres to regulations with great vigour, it is no wonder that it is number one in enforcement of environmental regulations as well as in ratifying environmental treaties. The WEF report points out that forest cover changes are alarming and baseline water is under stress.

Spain

The SWOT analysis carried out during the focus group is depicted in table 5.

Table 5. SWOT analysis of the Spanish tourism industry

Strengths	*Weaknesses*
• Favourable weather conditions for the development of tourist activity. • High diversity as an element of differentiation against competitors. • Numerous consolidated tourist destinations with high recognition in the market and with potential for specialization in new products. • Great variety of cultural resources - sometimes renown worldwide - distributed throughout the territory. • Numerous emerging tourist destinations with high potential for competitive growth, especially in large cities and in inlands. • Wide offer of beaches with good water quality and services. • Wide range, capacity and variety of accommodation. • Increase in the hotel offer of higher categories (4 and 5 stars). • Recognition of Spain as a sun and beach tourist destination. Positioning highlighted in the European middle classes. • Amplitude of the complementary offer, especially leisure, cultural and sports and recognized international prestige of Spanish cuisine. • High valuation of the quality-price ratio of Spanish tourism. • Importance of tourism for residents in Spain for the development of new products and reinforcement of traditional products. • Appearance of new specialized operators and added value, with business models adapted to the online channel and new technologies. • Growing implementation of quality assurance systems in the sector. • Extensive experience in tourism management, both private and public. • Strong capacity of the sector to adapt to changes, due to the dynamism of SMEs. • High volume of workers with extensive experience in the tourism sector. • Quality standardized and adapted to the requirements of the current customer profile. • Increase in the level of average studies of human resources. • Internationally recognized tourism statistics system • Weather • Loyal demand • Infrastructure	• High concentration and seasonality of the activity, which implies the saturation of the destinations in high season and that affects the levels of satisfaction of the demand. • Lack of knowledge about Spanish cultural heritage abroad. • Lack of identity in the tourism proposals of traditional destinations. • Inadequacy of the territorial planning systems of tourist destinations. • Excessive geographical concentration of the tourist and residential accommodation offer. • Environmental deterioration of a large number of destinations, as a result of excessive and disorganized urbanism. • Part of the accommodation infrastructure is old, especially in leisure subsector. • High dependence on the German, British and French markets. • Weak positioning in the high purchasing power demand segments. • Difficulties for the development of new segments due to poor commercial and product management. • Little entrepreneurial initiative in the development of new territories and products driven by public investments. • High presence of foreign tour operators and limited size of nationals. • Difficulty in the coordination of promotional activities between public entities and of these with the private sector. • Crowd of promotional brands. • Insufficient use of the possibilities offered by new technologies. • Low investment in R&D&I regarding specific weight of the tourism sector. • Mismatch of the official statistics system to new challenges and gaps in communication and dissemination channels. • Difficulties for coverage of jobs and high turnover of staff. • Deficiencies in the qualification of human resources in the sector. • Difficulties in retaining talent in the sector. • Little awareness among Spaniards of the importance of tourism in society. • Low environmental sensitivity of both tourists and residents

• Reliance quality-price • Accessibility to the market • Varied offer (activities)	• Excessive urban growth in the Mediterranean • Lack of collaboration between industry and administration and lack of vision (e.g., City of Light, Terra Mitica, Congress Center ...) • Lack of control, mismanagement, weak legislation • Compartmentalization of competences • Lack of resources for management • High seasonality (especially for sun, sea and sand tourism) • The image is focused on sun, sea and sand tourism • Residents´ exclusion
Opportunities • Natura 2000[14] (biodiversity, protected territories) • Ecotourism growth, health tourism, wellness, gastronomy, etc. • Sailor tourism growth, aqua-tourism • Fishing tourism (Pescatour[15]) • New Tourism law (regional level), opens new opportunities for cultural interest goods that are declared as priority • Planning of tourist spaces/destinations • Growth of hosting platforms • Management of open-air activities, ethics, good behaviour, public-private collaboration • Eco-tax (pay to enter natural parks) Tourism that generates funds for management (basic principle of ecotourism)	***Threats*** • Competitors - other markets in the Mediterranean (e.g., Tunisia) • Climate change • Lack of information / awareness • Management of environmental legislation (it is necessary to combine environmental management of resources with legislation and day to day management) • Mass tourism, overtourism, degradation of the environment, residents´ perception and attitude ... • Unfair competition (companies that do not comply with environmental regulations ...)

Source: experts who participated in the focus groups organized under the TOURIST Erasmus + project

[14] Natura 2000 is a European ecological network of biodiversity conservation areas. It consists of Special Zones of Conservation (ZEC) established in accordance with the Directive Habitat and Zones of Special Protection for Birds (ZEPA) designated under the Birds Directive. Its purpose is to ensure the long-term survival of species and habitat types in Europe, helping to stop the loss of biodiversity. It is the main instrument for the conservation of nature in the European Union. More details available at http://ec.europa.eu/environment/nature/natura2000/sites/index_en.htm

[15] More details available at https://www.pescatours.com/

The conservation of resources and tourist attractions, together with a demand increasingly lying on that is sustainable, especially in the environmental sphere. Thus, for promoting sustainable tourism, a tourism policy to incorporate this dimension is fundamental. The collaboration with agencies and relevant agents, both public and private, to integrate sustainability in the value chain of tourism products and destinations, cooperating with the different actors involved is vital.

In the case of natural heritage, for which Spain stands out (leading position in the world in Biosphere Reserves), ecotourism will be promoted as an attractive characteristic of the Spanish offer, in tight cooperating with the actors involved (e.g., National Parks Autonomous Organization). This is recognized in the Declaration of Ecotourism of Daimiel, as the main result of the First National Congress of Ecotourism in Spain. A roadmap is established to support this product, so beneficial for the conservation of biodiversity, thus contributing to meet objectives such as those mentioned by the World Tourism Organization for the 2017 as being the International Year of Sustainable Development through Tourism.

To this end, implementing methodologies based on the European Charter for Sustainable Tourism, the design of tourism products that take advantage of the tourism potential of the Spanish Biosphere Reserves and with the implementation of the Sustainability Recognition System in the protected areas of the Natura 2000 Network are requested. This initiative was created by the Ministry of Tourism in collaboration with the Ministry of Agriculture and Fisheries, Food and Environment (is the action 1.1 of the Sectoral Plan of Tourism of Nature and Biodiversity (Royal Decree 416/2014) that emanates from Law 42/2007 on Natural Heritage and Biodiversity).

The objective is encouraging companies to create sustainable touristic products. Therefore, a Training Program for companies on ecotourism was implemented. Moreover, the introduction of sustainability criteria for new tourism developments by public entities was also supported. Awareness within the tourism sector is required as well as an adequate communication between all stakeholders.

2.2.4. Quality standards for sustainable tourism

Austria

There are no quality standards, which are currently available to the industry in general. Still, there are several certifications and seals of approvals, which businesses are following to show their commitment to greener operations. Still, sustainability measures are only implemented by some well-implemented individual projects and businesses, which serve as benchmarks for the industry.

Examples for these certifications and seals are: ecolabels, eco-business labels, Alpine Pearls; Green Event; Green Location; Klima-Aktiv, etc.

Finland

The Nordic Swan (http://www.nordic-ecolabel.org) is the best-known ecolabel in the Nordic countries, 90 % of Nordic consumers recognise the label. The label is common in many industries including, hotels, restaurants and conference centres. In Finland some 40 hotels and restaurants have this label and have thereby committed themselves to reduce the use of water, waste and electricity.

The Green key (http://www.greenkey.global/) is the other common eco-label in Finland. More than 70 sites have acquired this label, which has been developed especially for the hospitality industry.

Laatutonni is a Finnish quality system that has been developed for the Finnish tourism industry and especially for small and medium sized companies. Laatutonni is a program with it roots to a project launched by VisitFinland in 2001. Some key criteria for good quality are specified in the system. The Laatutonni program comprises training and support during a couple of years for the companies involved, where after the ideal would be that the companies are able to continue the quality work by themselves.

Spain

The quality policy of Spanish tourism is another example of State policy born in 1992 with the approval of FUTURES I: Spanish Tourism Competitiveness Framework Plan 1992-1995, continued by the following Spanish Tourism Framework Plans, including PNIT, 2012 -2015, where the promotion of the differentiating elements that promote quality was established, such as the Spanish Tourism Quality System (hereinafter SCTE).

The Spanish Tourism Quality System (SCTE) has been created and developed by the State Secretariat of Tourism from 1992 to the present. It consists of a set of technical and methodological solutions, in which they are intrinsically related concepts such as quality, competitiveness, profitability and sustainability.

The Ministry of Tourism has developed a strategy for attracting entrepreneurs to SCTE programs.

The promotion and dissemination of the different quality programs (Q, SICTED, Hosts, etc.) is carried out permanently through the organization of working groups with the Autonomous Communities, as well as sensitization and promotion days organized by local entities.

In order to guarantee a homogenous implementation of the project in the territory, it is vital to update the training for new SICTED agents: managers, trainers, assessors and assessors. The Secretary of State for Tourism has developed training actions in SCTE and SICTED aimed at the tourism sector: in 2013, 2014, 2015 and 2016 courses have been carried out within the "Hosts" program, as well as courses of SICTED managers. Training will have continuity in 2017.

In the development of the system, likewise, the Secretary of State for Tourism has drawn up a Service Charter for users of SICTED, a study on improvements in quality in establishments that involve improvements in customer perception, and an analysis of the satisfaction surveys carried out on customers of the SICTED destinations of the last 4 years.

2.2.5. Good practices in sustainable tourism

In each one of the European countries there are different examples that could be considered as good practice in sustainable tourism. Therefore, in the following pages some examples will be detailed by country. However, in the box bellow wine tourism is depicted as an example of how to promote rural development in Europe.

Wine tourism, the driver of the rural world in Europe

The project "Wine & Senses: a European commitment to sustainable wine tourism" brings together different entities and companies from Spain, Italy, Hungary, Portugal and the Czech Republic.

19 MARCH, 2019
EFE

Typical image of La Rioja in autumn: a tower crowns a hill above the reddish vineyards. Photo: Efetur / Cedida by Turismo de La Rioja.

The Santa María la Real Foundation has presented the Wine & Senses project in Vitoria, an initiative that aims to promote tourism in four European rural wine regions and generate wine tourism circuits that revolve not only around wine and heritage.

The project "Wine & Senses: a European commitment to sustainable wine tourism" brings together different entities and companies from Spain, Italy, Hungary, Portugal and the Czech Republic, to generate touristic circuits in which the wine heritage is the protagonist and has been presented at the International Wine Turism Conference, which was held this week in Vitoria.

According to the Santa María la Real Foundation in a press release, the coordination of this project is the responsibility of Cultur Viajes, the agency specialized in cultural tourism of the entity, and has the support of another Spanish entity, the Cluster Aeice, to through the Douro-Douro initiative.

The main objective of Wine & Senses, which began its journey at the end of 2018, is to design tours that unite heritage, landscape, history and gastronomy, with wine as the axis, so that visitors can enjoy it in and with all the senses.

Wine tourism routes that turn each itinerary into a true sensory experience for the traveler and away from traditional routes or mass tourism, betting on a sustainable enjoyment of the territories with hiking activities, guided tastings in unique places, musical performances in patrimonial spaces, or guided visits to wineries or vineyards.

The presentation in Spain
The presence in Vitoria has served to present Wine & Senses to different international tour operators and to learn about other interesting experiences in the field of wine tourism that can be incorporated into the development of the project.

Together with Cultur Viajes, which leads the project, contributing its experience in the development of cultural routes and itineraries, Wine & Senses has the participation of the Aeice cluster, through the Douro-Douro initiative.

The multidisciplinary work team is completed by the European Network of Wine Cities (Recevin), the Parco Cinque Terre, the National Heritage Institute of the Czech Republic, the Mad Circle association and the Italian technology company Informamuse.

All of them represent Spain, Italy, Hungary, Portugal and the Czech Republic, countries that concentrate more than half of the wine production in Europe and that, in addition, have a great patrimonial wealth.

Both factors will be the pillars on which the work of the Wine & Senses consortium is based, said the Foundation.

Austria

In the case of Austria, it is important to mention that projects dealing with sustainability need to be clearly positioned on the market to ensure long-term success of these projects. Among the good practices according to the experts and the participants in the focus group, the following were mentioned:

- Michaela Reitterer – Boutiquehotel Stadthalle Wien - At eco-friendly Hotel Stadthalle, environmental awareness has top priority. Depending on the weather, the 130m² of solar panels heat up enough hot water to supply the entire hotel with renewable energy. The hotel follows the concept of a zero-energy balance and was awarded with many certificates and prices.
- Werfenweng – Werfenweng is a small alpine destination in Austria, member of the Alpine Pearls. Focusing on soft mobility development, it has been awarded for being a model village in this area. Werfenweng owns a huge e-vehicle fleet available for tourists to use freely. The destination also promotes alternative use of energy, local products, and organizes special projects involving local residents in sustainable tourism development discussions. The destination is acknowledged to be the number one municipality in Salzburg for people with disabilities.
- Sleep Green Hotels – an association of individual hotels with a common vision: To set the sensitive and careful handling with valuable and natural resources, on a holistic level, as a standard in tourism and revolutionize the whole industry. With new ideas and approaches the association wants to stop demanding from the nature what we cannot give back.
- Alpine Pearls – The umbrella organization Alpine Pearls joins together 25 of the most gorgeous Alpine villages in their quest for gentle mobility and climate-friendly holidays. Guests at these villages will enjoy carefully chosen environmentally friendly mobility solutions like nowhere else. These handpicked villages provide a variety of mobility options, which ensure that tourists are able to get around in ways that do not adversely affect the environment.
- Klima Aktiv – is the climate protection initiative of the Ministry of Tourism and Sustainability to increase climate protection in Austria through expert support and training in various areas.

Finland

On the other hand, Finland's tourism revenue has grown steadily as the number of international travellers has increased. Another, more sustainable growth derives from increasing the consumption, nor only the numbers of travellers. For this purpose to produce high-margin added value services for domestic and international tourists is in the core of the Roadmap for Growth and Renewal in Finnish Tourism for 2015–2025. Another important target is to make finding and buying the Finnish travel services easy by enhancing sales and marketing in this area. Customer orientation, innovative products and working methods, digital applications, sustainability and profitability are regarded as enablers of tourism planning and development (TEM raportteja 2/2015, 6).

Sustainability is included in the product development and sales criteria among quality and safety control. It means that a company has been awarded a sustainability label or sustainability training has been implemented. These products are awarded 'authentic culture experience' or 'authentic finrelax experience' label by Visit Finland.

Furthermore, sustainable tourism, profitability, new collaboration models, and quality management are included in the roadmap as the key pillars supporting success. Sustainable tourism development focuses on training of travel and tourism companies and communicating sustainability with international tour operators and visitors. Lack of communicating sustainability is seen as a big weakness among Finnish travel and tourism companies. As stated earlier, according to WEF, Finland is among the best in enforcement of environmental regulations. Tourism businesses could communicate about their sustainability performance for the visitors more, but it may not be very common thing to do. The Finnish government has not traditionally prioritized travel and tourism, since the emphasis has been in supporting the manufacturing industries and large export-oriented companies. Since the importance of travel and tourism as a business grows, also the Finnish government contributes now contributes more in the development.

So far the only Nordic country with a specific label for sustainability of destinations is Norway. In Finland a sustainable destination label is though under construction. The pilot training and implementation of sustainable destination development programme will most likely take place in 2019.

In addition to Finnish Government and Visit Finland, Finnish national parks and Unesco world heritage sites have developed principles of sustainable tourism. It gives guidelines not only for the site managers but also for the businesses operating in the sites.

Tourism development has been strongly included in regional planning and policy on province and municipality level in more peripheral areas. A lot of resources for implementing the plans and policies are originally from European Union structural funds. Key activities related to the work towards sustainable tourism have so far been related overcoming the challenges with seasonality and poor accessibility.

Spain

In line with the tourism policy of the European Union, the Ministry of Agriculture, Fisheries, Food and Environment (MAPAMA) and the Ministry of Tourism, promote different actions among which it is worth mentioning the "Plan for Enhancing the Environment " (PIMA SOL), for the promotion of energy rehabilitation of hotel facilities. This initiative is aimed at reducing greenhouse gas (GHG) emissions from the Spanish tourism sector. Specifically, it promotes the reduction of direct GHG emissions in hotel facilities achieved through the energy rehabilitation of these. Also, the "Carbon footprint record, compensation and carbon dioxide absorption projects". The registry, of a voluntary nature, was born with the vocation to encourage calculation and reduction of the carbon footprint by

Spanish organizations, as well as promoting the projects that improve the sink capacity of Spain, constituting, therefore, in a measure of combating climate change horizontal character.

In addition, recently, an agreement has been signed between the State Secretariat of Tourism and the Technical Hotelier Institute (ITH), to develop a "Tourism sustainability model and plans of improvement" in hotels. The model includes energy efficiency variables (ACS systems, lighting, air conditioning, etc.), use water (dispensers, supply systems, purification), waste management (reuse), thermal envelope systems, accessibility, policy and CSR and other variables of sustainability (Instituto Técnico Hotelero[16]).

All this, driven by the European Action Plan for Energy Efficiency 2011-2020[70] which estimates that hotels have the capacity to reduce energy consumption by 30% for the year 2020, approximately the same potential for energy savings than the residential and transport sectors.

To promote and recognize the best hotels in sustainability and hotel rehabilitation in Spain, the Re Think Contest has been created Hotel. An initiative whose objective is to activate the interest of tourism entrepreneurs for the sustainable hotel rehabilitation, both for economic benefits[71] and environmental that offers its implementation, as for the generation of a key strategic value for the future development of the sector.

At regional level (autonomous communities), different sustainable tourism actions were also put into place as follows. Each Autonomous Community develops policies that promote sustainable tourism in its region, as for example:

- Andalusia: This Community since 2014, presented the "General Plan for Sustainable Tourism 2014-2020". The Plan aims to balance the Andalusian tourism sector to guarantee a model sustainable and competitive tourism from the point of social, environmental and economic view based Primarily in the differentiation.
- Euskadi: In 2014 the "Basque 2020 Strategic Tourism Plan" is presented. "Euskadi, a destination always linked to quality and excellence, now also takes determined steps to be a sustainable destination" declared the Deputy Minister of Basque Government, Itziar Epalza at the world summit of Sustainable Tourism + 20, held in Vitoria-Gasteiz in 2015.
- Principality of Asturias: has launched a Sustainable Tourism Program 2016-2020 that has been agreed with the sector and that bet for internationalization and cut seasonality and will have a special impact on the training of the professionals.
- Balearic Islands: Law approved in March 2016 2/2016, of the tax on tourist stays in the Balearic Islands and measures to boost the sustainable tourism. Tourists who visit the islands as of July 1, 2016, pay each day a tax of between 0.5 and 2€. The collection is intended to endow the Impulse Fund with Sustainable tourism.

On the other hand, under the Collaboration Agreement signed by the World Tourism Organization (UNWTO) and the Spanish Global Compact Network thirteen Spanish companies have committed

[16] http://www.ithotelero.com/portfolio-item/proyecto-secr-estado-modelo-sostenibilidad/

to develop social responsibility practices that advocates for sustainable tourism. Under the title "Responsible tourism: a commitment for all" the initiative highlights the role of tourism businesses to achieve the Sustainable Development Goals (SDG).

3. Southeast Asian countries and sustainable tourism

3.1. Southeast Asian Tourism in a Nutshell

3.1.1. General insides

It is worth mentioning that under a favourable economic context and counting with improvements of their economic growth potential in the medium run (i.e., global competitiveness), human capital and global talent competitiveness, emerging economies are growing in the last decades at a faster rhythm compared to advanced economies. Among emerging countries, the Association of Southeast Asian Nations (ASEAN) members are experiencing also a great progress registering a GDP growth of over 5% in the last years, a trend that seems to be maintained at least up to 2023 (IMF, World Economic Outlook 2018). The ASEAN-5 economies (Indonesia, Malaysia, Philippines, Thailand, Vietnam) have a growth projection of 5.3% in 2018 and 5.4% in 2019. Indonesia and Malaysia are expected to grow at similar average rate (5%) while Thailand is supposed to grow under 4%.

In fact, Asia and the Pacific is the world's largest region in economic terms. Moreover, the region accounts for over one-third of the world's economy (34%), most of which in North-East Asia (25%). This was possible due to the increasing market liberalization, large infrastructure development and rising middle classes. Income levels in Asia and the Pacific have rushed since the past decade, with the region's per capita GDP practically doubled from 2005 to 2016 reaching 6,240 USD in 2016. Rapid economic growth in a region with over half the world's population, coupled with rising air connectivity, market openness, travel facilitation and promotion have boosted international travel in Asia and the Pacific, both intraregional and interregional.

In the same vein, tourism has substantial potential in the region. Regarding international tourist arrivals, remarkable growth was experienced in the last years. Asia and the Pacific is the second most visited region in the world after Europe and has been the fastest growth in recent years. In 2016 the region enjoyed a remarkable 9% increase in international arrivals, the highest across world regions. Between 2005 and 2016 Asia outperformed all world regions in terms of growth, with arrivals increasing an average 7% per year, compared to the world average of 4%. Including 2016, the region has seen seven straight years of consistently robust growth. Southeast Asia enjoyed 9% growth in 2016 while South Asia 8%. Moreover, South Asia and Southeast Asia are the fastest-growing subregions in the world, with arrivals increasing an average 11% and 8% per year respectively in the period 2005 to 2016. In 2016, half of all were in North-East Asian destinations (154 million arrivals), 37% of the international tourist arrivals in Asia and the Pacific went to South-East Asia (113 million), and 8% to South Asia (25 million). The world ranking by international arrivals features two Asian destinations in the top ten: China (4th) with 59 million international tourist arrivals and Thailand

(9th) with 33 million (2016 figures). Thailand is the top tourism earner in Asia and the Pacific with USD 50 billion earned in tourism receipts, after a 15% increase in 2016 and several other years of double-digit growth while China is the number two earner in Asia and number four in the world, with receipts totalling USD 44 billion, after a 5% increase in 2016. Additionally, Europe remains the largest source of interregional travel to Asia and the Pacific, accounting for 10% of all arrivals in the region.

Based on Asia Tourism Trends 2017 published by the UNWTO, Asian tourism prospects for the first half of 2017 are as follows:

- International tourist arrivals (overnight visitors) worldwide grew 6% in the first half of 2017, compared the same period in 2016. This represents the strongest half-year results in seven years. The solid trend is underpinned by continued growth in many destinations and a recovery in those that decreased in 2016;
- The strongest growth was in the Middle East (+9%), Europe (+8%) and Africa (+8%), followed by Asia and the Pacific (+6%) and the Americas (+3%);
- Mediterranean destinations in particular reported strong growth in the first half of 2017, with remarkable results in North Africa (+16%), Southern and Mediterranean Europe (+12%), and the Middle East (+9%);
- In Asia and the Pacific (+6%), results were led by South Asia (+12%) in the first half of 2017, followed by Oceania (+8%), South-East Asia (+7%) and North-East Asia (+4%);
- Preliminary results for July and August 2017 point to continued growth during the second half of the year, and over the long-term with as the trend seems to continue also during the period 2010–2020 (+3.8%).

The South Asian Association for Regional Cooperation (SAARC) adopted the Kathmandu Declaration during the 18th SAARC summit (November 2014) aiming to promote South Asia as an attractive tourist destination in a sustainable manner. The SAARC Action Plan on Tourism from 2006 was also debated targeting to initiate an appropriate public and private collaboration (SAARC, 2014). South Asia is predicted to become the second largest growth region based on its international arrivals, increasing around 7% between 2014 and 2018 (PATA, 2014). Within the region Thailand is one of the tourism destinations registering the strong growth in international tourist arrivals.

3.1.2. Southeast Asian Tourism agenda[17]

The Association of Southeast Asian Nations (ASEAN), including as member states Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam, designed the ASEAN Tourism Strategic Plan 2011-2015. Through this strategic plan ASEAN tourism tries to make achieve the ASEAN integration in the post 2015 decade of moving towards a more “inclusive,” “green” and “knowledge-based” economic growth. Thus, a more

[17] Based on ASEA Tourism Startegic Plan 2016-2025 and information facilitated by the Asian partner countries of TOURIST project.

strategic approach is needed able to enhance the development of ASEAN as a competitive, sustainable, and more socio-economically inclusive and integrated tourism destination. For this objective, several aspects are to be considered: a single destination marketing, quality standards, human resource development, connectivity, investment, community participation, safety and security and natural and cultural heritage conservation challenges. Therefore, the vision for ASEAN tourism from 2016 to 2025 is:

"*By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, inclusive and balanced tourism development, so as to contribute significantly to the socioeconomic well-being of ASEAN people.*"

In this regards, a strategy to ensure sustainability of tourism and its inclusive character in ASEAN is included. It includes 3 main strategic actions with the corresponding activities:

(1) Upgrade Local Communities and Public-Private Sector Participation in the Tourism Value Chain.
    a. Develop and implement the strategy on participation of local communities and private sectors in tourism development.
(2) Ensure Safety and Security, Prioritize Protection and Management of Heritage Sites
    a. Work with official bodies and organizations in support of safety, security, and protection of key destinations in ASEAN.
    b. Work with official bodies and organizations in support of the protection and management of heritage sites.
(3) Increase Responsiveness to Environmental Protection and Climate Change
    a. Work with official bodies and organizations to address environmental, and enhance climate change responsiveness.
    b. Prepare a manual of guidelines for incorporating environment and climate change mitigation, adaptation, and resilience.

The supervision of the design, implementation and monitoring and evaluation of regional tourism programs and projects will be carried out at regional level. The policy framework will be facilitated by the ASEAN Tourism Ministers, while the executing body to implement the strategic plan for 2016-2025 will be performed by ASEAN National Tourism Organizations through four Committees:

- The ASEAN Tourism Competitiveness Committee
- The ASEAN Sustainable and Inclusive Tourism Development Committee
- The ASEAN Tourism Resourcing, and Monitoring and Evaluation Committee
- The ASEAN Tourism Professional Monitoring Committee

With this stratgic plan it is anticipated that by 2025:

- The contribution of ASEAN tourism to the regional GDP could increase from 12% to 15%.
- Jobs created from tourism out of total employment could increase from 3.7% to 7%.

* International tourists´expenditure per capita could increase from 877 US$ to 1,500 US$.
* Increase the average length of stay of international tourist arrivals from 6.3 nights to 8 nights.
* The number of accommodation units could increase from 0.51 units per 100 head of population in ASEAN to 0.60 units per 100 head of population.
* The number of awardees for the ASEAN tourism standards could increase from 86 to 300.
* The number of community-based tourism value chain project interventions could increase from 43 to over 300.

In the case of Vietnam, where tourism witnessed historical landmarks in 2017 and awarded as the best golf destination in the Asia-Pacific region in the same year, several actions were taken:

(1) the Politburo released Resolution 08-NQ/TW on developing tourism into a key economic industry;
(2) the National Assembly approved the Tourism Law 2017;
(3) Vietnam successfully hosted the APEC High-level Policy Dialogue on Sustainable Tourism with adopted Statement on "Promoting Sustainable Tourism for an Inclusive and Interconnected Asia-Pacific".

The above achievements have set the platform and favourable conditions for the development of Vietnam tourism in the coming period to reach 17-20 million international tourist arrivals, serving 82 million domestic visitors, and a contribution of over 10% of GDP by 2020, set by the Resolution 08-NQ/TW.

3.1.3. Travel and tourism competitiveness[18]

The Asia-Pacific, including some of the economies that have flourished most in recent years[19], is second only to Europe in terms of travel and tourism market size. Moreover, it is the most dynamic area globally with the largest growth rate in arrivals and the most significant improvements in travel and tourism competitiveness performance. This might be due to the economic growth and the consequent expansion of the middle class and an increasing affordability and willingness to travel, particularly within the region. The impact of the economic development over tourism industry is forecasted to reach almost 1.2 trillion in 2026, i.e. 86% growth rate (WTTC, 2018).

The region is characterized by outstanding natural resources, highly-qualified labour force and governments that understand the potential and support the tourism sector. However, at least environmental sustainability, clearly in the spotlight of policymakers, is still a major concern within the region.

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[18] Based on the Travel and Tourism Competitiveness Report carried out by the World Economic Forum.
[19] According to the World Economic Fourm, five out of the 15 most-improved countries in the index: Japan (4th), Korea (19th), India (40th), Vietnam (67th) and Bhutan (78th).

Regarding the countries from South-East Asia (ASEAN), competitive prices and their natural resources made tourism in the region a lot more attractive. Despite the availability of cultural resources they have been less valued than natural assets. There is no doubt that ASEAN members prioritize tourism in their development agenda, but their main challenges are linked to infrastructure (air, road and tourism service infrastructure) and ICT readiness especially when comparing between the most advanced in the sub-region (e.g., Singapore, Malaysia and Thailand) versus the rest. Additionally, security perceptions is suffering due to political developments in recent years which transfers a sense of unpredictability to tourists. Improving regional visa policies could further enhance travel and tourism.

Table 6 depicts the pillars considered by the World Economic when developing the travel and tourism competitiveness.

Table 6. Travel and tourism competitiveness components: Asia-Pacific sub-regions

		Enabling environment				
Country/Economy	Global rank	Business environment	Safety and security	Health and hygiene	Human resource and labour market	ICT readiness
EASTERN ASIA AND PACIFIC						
Japan	4	5.3	6.1	6.4	5.2	6.1
Australia	7	5.1	6.1	6.1	5.1	6.0
Hong Kong SAR	11	6.2	6.5	6.6	5.4	6.5
China	15	4.2	5.0	5.4	5.2	4.6
New Zealand	16	5.6	6.3	5.7	5.5	6.0
Korea, Rep.	19	4.7	5.8	6.4	4.9	6.2
Taiwan, China	30	5.2	6.0	6.1	5.3	5.5
Mongolia	102	4.4	5.7	5.8	4.5	4.0
Eastern Asia and Pacific		5.1	5.9	6.1	5.1	5.6
SOUTH-EAST ASIA						
Singapore	13	6.1	6.5	5.5	5.6	6.1
Malaysia	26	5.4	5.8	5.2	5.2	5.2
Thailand	34	4.7	4.0	4.9	4.9	4.8
Indonesia	42	4.5	5.1	4.3	4.6	3.8
Sri Lanka	64	4.7	5.5	5.3	4.5	3.7
Vietnam	67	4.4	5.6	5.0	4.9	4.2
Philippines	79	4.3	3.6	4.8	4.8	4.0
Lao PDR	94	4.7	5.4	4.3	4.6	3.1
Cambodia	101	3.7	5.1	4.0	4.1	3.6
South-East Asia Average		4.7	5.2	4.8	4.8	4.3
SOUTH ASIA						
India	40	4.3	4.1	4.4	4.4	3.2
Bhutan	78	4.7	6.1	4.6	4.3	3.9
Nepal	103	4.1	4.8	5.0	4.2	2.6
Pakistan	124	3.9	3.1	4.5	3.1	2.5
Bangladesh	125	4.1	3.7	4.3	3.8	3.1
South Asia Average		4.2	4.4	4.6	4.0	3.1

Colors are determined by the relative position of each score in the global distribution of each pillar, taken individually.

Source: WEF (2018).

Table 6. Travel and tourism competitiveness components: Asia-Pacific sub-regions (continues)

Country/Economy	T&T policy and enabling conditions				Infrastructure			Natural and cultural resources	
	Prioritization of T&T	International Openness	Price Competitive-ness	Environmental Sustainability	Air Transport Infrastructure	Ground and port infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Resources & Business Travel
EASTERN ASIA AND PACIFIC									
Japan	5.4	4.4	4.6	4.4	4.6	5.4	5.3	4.3	6.5
Australia	5.1	4.8	3.8	4.5	5.7	3.6	6.1	5.2	5.0
Hong Kong SAR	5.8	3.9	4.2	4.3	5.5	6.4	4.4	3.5	3.0
China	4.8	3.0	5.3	3.2	4.3	4.0	3.2	5.3	6.9
New Zealand	5.6	4.5	4.4	4.7	4.7	3.7	5.7	4.5	2.3
Korea, Rep.	4.6	4.3	4.7	4.2	4.3	5.0	4.6	2.3	4.9
Taiwan, China	4.7	4.2	5.2	4.1	3.5	5.2	4.5	3.4	3.2
Mongolia	4.0	1.9	5.7	3.4	2.2	2.1	2.7	2.7	1.8
Eastern Asia and Pacific	5.0	3.9	4.7	4.1	4.4	4.4	4.6	3.9	4.2
SOUTH-EAST ASIA									
Singapore	6.0	5.2	4.7	4.3	5.3	6.3	5.4	2.4	3.1
Malaysia	4.7	4.1	6.1	3.5	4.5	4.4	4.7	4.1	2.9
Thailand	5.0	3.8	5.6	3.6	4.6	3.1	5.8	4.9	2.8
Indonesia	5.6	4.3	6.0	3.2	3.8	3.2	3.1	4.7	3.3
Sri Lanka	5.2	3.1	5.6	3.9	2.6	3.9	3.2	4.1	1.6
Vietnam	4.0	3.0	5.3	3.4	2.8	3.1	2.6	4.0	3.0
Philippines	4.8	3.4	5.5	3.6	2.7	2.5	3.4	4.0	1.9
Lao PDR	4.7	3.0	5.7	3.8	2.1	2.4	3.5	3.0	1.3
Cambodia	5.1	3.5	5.1	3.3	2.1	2.4	2.9	3.2	1.6
South-East Asia Average	5.0	3.7	5.5	3.6	3.4	3.5	3.9	3.8	2.4
SOUTH ASIA									
India	3.9	3.7	5.8	3.1	3.9	4.5	2.7	4.4	5.3
Bhutan	5.0	2.9	6.0	4.6	2.7	2.5	2.7	3.5	1.3
Nepal	4.8	2.8	5.6	3.4	2.0	1.9	2.3	4.2	1.3
Pakistan	3.4	2.2	5.4	3.1	2.1	3.0	2.3	2.2	1.9
Bangladesh	3.2	2.5	4.7	3.4	1.9	3.1	1.9	2.4	1.6
South Asia Average	4.1	2.8	5.5	3.5	2.5	3.0	2.4	3.3	2.3

Colors are determined by the relative position of each score in the global distribution of each pillar, taken individually.

Source: WEF (2018).

Thailand

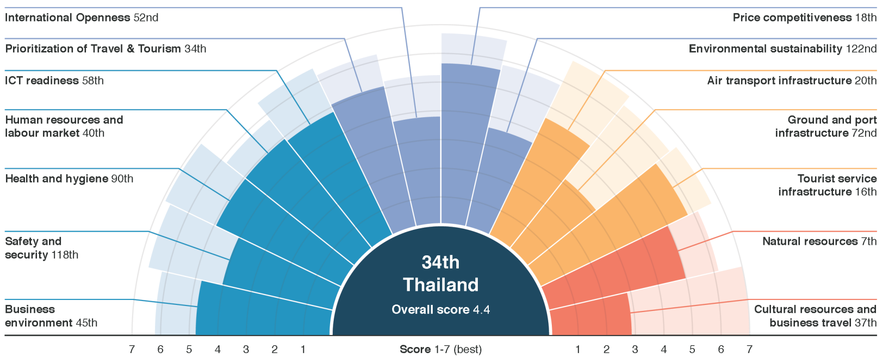
Thailand's vibrant tourism sector has played an increasingly important role in the economy in recent years, boosting many related businesses and helping compensate for weak growth in other sectors. International arrivals has reached 32 million in 2016, lifting tourism's share of GDP to 11%The direct contribution of Travel & Tourism to GDP in 2016 was THB 1,292.5 billon (9.2% of GDP) according to World Travel and Tourism Council recent estimation. This is forecast to rise by 9.3% to THB 1,412.2 billon in 2017. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. The direct contribution of Travel & Tourism to GDP is expected to grow by 6.7% pa to THB 2,708.0 billon (14.3% of GDP) by 2027. According to Thai News Bureau Thailand has been visited by 12 million foreign tourists in the first four months of this year, generating more than 800 billion baht. According to the Ministry of Tourism and Sports, 2,827 million foreigners visited Thailand in April, 1,877 million of whom were from East Asia, followed by Europe and South Asia. Thailand gained 139.9 billion baht from tourism last month, which represents an increase of 7.64% year on year. Between January and April 2017, the Land of Smiles welcomed 12.02 million people from overseas, creating a 2.91% rise in visitor numbers. The industry generated more than 800 billion baht for the country, an increase of 4.71% compared to the same period last year. In addition to direct income from tourist spending, the sector contributes to the economy via job creation and investment. The three tourism-related sector (i.e., hotel and restaurant, wholesale and retail trade, transportation and communication) together employ more than 10 million workers, adding 1.4% each year and comprising 26% of total employment in Thailand. The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, was THB2 906.8 billion in 2016 (20.6% of GDP) and is expected to grow by 9.4% to THB 3,178.8billon (21.9% of GDP) in 2017. The government and private sector should jointly undertake serious efforts to improve key supply-side factors.

This means developing human capital, maintaining tourism sites and public assets and investing in well-connected transport infrastructure. Travel & Tourism generated over 2 million jobs directly in 2016 (6.1% of total employment) and this is forecast to grow by 6.3% in 2017 to almost 2.5 million. Tourism staff need training in ethics, technology, creativity and innovation as well as language skills and service quality. More security employees must be provided, while laws and regulations must be improved and enforced to ensure public safety. Thailand needs high-quality, convenient public transport systems that connect primary and secondary destinations nationwide. Tourists need complete information on transport means , routes and online ticketing[20].

Thailand was ranked in the 34th position of the travel and tourism competitiveness of 2017 (see figure 9). Still, a large infrastructure (air, road and tourism service infrastructure) and ICT readiness gaps remain compared to the most advanced economies in the sub-region, especially Singapore, mainly regarding the ground and port infrastructure. In addition, declining security perceptions resulting from political developments in recent years is leaving tourists with a sense of unpredictability. Cultural resources, and business travel, environmental uncertainty and international openness are also under-ranked and require improvements in the future.

20 http://www.thailand-business-news.com/tourism/55012-thailand-tourism-analysts-forecast-37-million-arrivals-2017.htm

Figure 9. Thailand´s travel and tourism competitiveness components



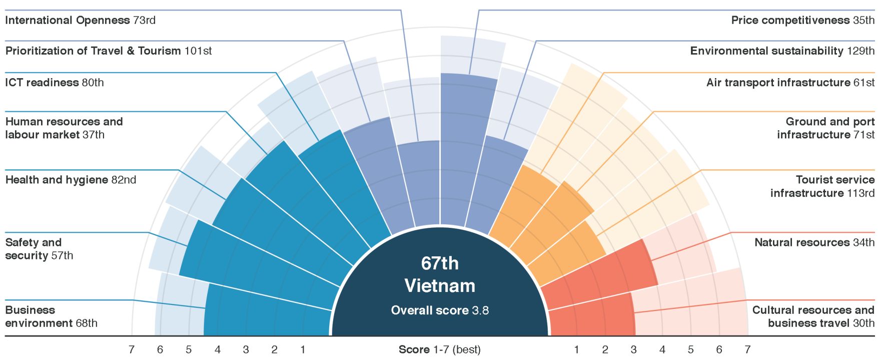
Source: WEF (2018).

Vietnam

Vietnam in 2017 was ranked as 67th globally. The main drivers of its competitiveness in travel and tourism industry are its natural resources, cultural resources and price competitiveness. Significant progress was undertaken in Vietnam on its human resources and labour market pillar thanks to a better-qualified labour force and partially simplified regulation to hire foreign labour. Exceptional improvement were also made to its ICT capacity and usage, i.e., over 90% of the national territory is covered by a 3G signal, and individual internet usage rose to 53%. Thus, penetration of ICT is proceeding at a sustained velocity. Moreover, searches on Vietnam's natural tourism are increasing, and with it the demand of its natural resources is also improving. A positive evolution was also experienced by business travels due to the continued economic development. On the same vein, security and safety perception are also making Vietnam more attractive as a touristic destination.

Still, Vietnam should focus on environmental sustainability, improvements are needed in its regulations, reduction of greenhouse gas emissions. Additionally, deforestation and limited water treatment have a negative impact on the environment and should be attended for achieving a more sustainable tourism.

Figure 10. Thailand´s travel and tourism competitiveness components



Source: WEF (2018).

3.1.4. Tourism development

Thailand

Major touristic products and services focusing on the most promising on terms of growth

Thailand's Central part contains a variety of destinations and attractions due to its diverse environmental, geographical, and historical background (see table 7).

Table 7 Details of tourism resources in the central part of Thailand

Tourism Resources categoried by province													
type	Man Made					Natural							
province	**Historical**	**Recreation**	**Culture**	Agro-tourism	Arts and Scie	**Eco-tourism**	Rapid	**Waterfall**	Hot Spring	Cave	Landform	Beach	Island
1. Bangkok	**179**	**78**	**65**	3	9	2	0	0	0	0	0	0	0
2. Nakornnayok	20	14	13	2	1	1	2	**12**	0	1	0	0	0
3. Nontaburi	26	7	19	0	0	0	0	0	0	0	0	0	0
4. Prachuabkirikan	17	13	8	0	2	**17**	0	11	0	3	0	19	2
5. Ayuthaya	57	3	10	0	3	0	0	0	0	0	0	0	0
6. Lopburi	45	11	13	0	0	4	0	2	0	0	0	0	0
7. Samutsakorn	14	3	17	0	1	4	0	0	0	0	0	0	0
8. Singhaburi	28	6	11	0	0	0	0	0	0	0	0	0	0
9. Petchaburi	19	5	3	3	2	13	1	8	1	3	1	0	0
10. Karnchanaburi	38	8	9	1	3	13	0	**12**	2	10	0	0	0
11. Chainat	27	9	9	0	2	2	0	0	0	0	0	0	0
12. Nakornprathom	33	7	22	1	2	0	0	0	0	1	0	0	0
13. Pratumthani	40	4	11	0	2	0	0	0	0	0	0	0	0
14. Ratchaburi	23	11	9	1	1	1	0	1	2	3	1	0	0
15. Samutsongkram	24	4	19	1	1	2	0	0	0	0	0	0	0
16. Saraburi	18	10	10	1	1	2	1	11	0	4	0	0	0
17.Suphanburi	46	13	23	4	0	3	0	3	0	1	1	1	0
18. Angthong	47	3	15	4	2	0	0	0	0	0	0	0	0
Total	**701**	**209**	**286**	**21**	**32**	**64**	**4**	**60**	**5**	**26**	**3**	**20**	**2**

These attractions include historic buildings/ruins/sites, beaches, agricultural and cultural attractions (tangible and intangible). Therefore, Thailand central area posits itself as "the destination for variety". Tourists can enjoy the vast variety of tourism attractions which are easily connected/accessed via extensive transportation systems. This results in the increasing number of tourists and tourism income in the recent years. The province with highest tourist arrivals has been Prachuab-kirikan, Phetchaburi, Kanchanaburi, and Ayutthaya.

Additionally, Bangkok, the capital city located in central part of Thailand, is listed as one of the most visited city in the world according to the Mastercard Global Destination Cities Index.

It is obvious that the tourism in central part of Thailand are rich in historical as there are present capital city (Bangkok) and former capital city (Ayutthaya) which is registered as world heritage by UNESCO, followed by cultural and recreational respectively. Regarding to natural type of tourism in the central part, ecotourism is counted the most and followed by waterfall.

Main stakeholders and actors involved in the tourism industry and responsible for strategic development

Key Stakeholders in the Central Thailand Tourism Sector

1. Internal
    a. Tourism businesses
        i. Accommodation
        ii. F&B
        iii. Tour operator
        iv. Transportation
    b. Other supporting services
        i. Hospital
    c. Employees
    d. Community
    e. Local authorities
    f. Tourists
    g. Provincial chamber of commerce

2. External
    a. Government
    b. NGOs
    c. Academic institutions
    d. Associations in national level
    e. National tourism organization e.g. TAT
    f. National and international organization for standardization

Key Stakeholders in the Northern Thailand Tourism Sector

1. Internal Regional/Local
    a. Local community directly and indirectly affected by tourism
    b. Provincial government offices (Tourism, Development, Law Enforcement, etc.)
    c. Tourism Associations
    d. Industry-related organizations such a tour operators, hoteliers, resellers and agencies
    e. Domestic and International Tourists
    f. Tourism related Civil Society Organisations (CSOs)
2. External Regional/Local
    a. CSOs not directly related to tourism (environmental protections, human-trafficking, etc.)
    b. Investors
    c. Regional Educational Institutions
3. Internal National
    a. Central government, Tourism Authority of Thailand (TAT)

b. National Tourism Associations (DASTA)
c. National Institutions of Education
d. Domestic and International Tourists

4. External National
    a. CSOs not directly related to tourism (environmental protections, human-trafficking, etc.)
    b. Investors
    c. Researchers
    d. Government departments not directly related to tourism (Immigration laws and visa rules)
5. International
    a. Foreign Governments (Investment, Travel Advisories and Visa regulations)
    b. International NGOs funding tourism-related projects

Key Stakeholders in the Southern Thailand Tourism Sector

1. International level: UNWTO, World Bank, Asian development bank
2. Regional level: ASEAN Tourism Association (ASEANTA) and ASEAN Hotels& Restaurant Association (AHRA)
3. National governments: Ministry of tourism and sport: Tourism Authority of Thailand, Ministry of transport, Ministry of education.
4. Local governments: Provincial Governor, Provincial Administrative Organization (PAO), Municipality level.
5. Local community: Head of village or community
6. Private sector: Hotel association, The Association of Thai Travel Agents.

Main strategies for tourism development

In August 2015, a draft tourism strategy for 2015-2017 was proposed and approved by the Thai government. The Ministry of Tourism and Sports was responsible for implementing these strategies based on the tourism policy and the National Tourism Development Plan aiming to continue including tourism promotion in the national agenda and step up efforts to achieve the set of targets in the next few years. Emphasis was to be placed on necessary and urgent activities and on improving tourist sites to a better quality. All relevant agencies were urged to join these efforts and help preserve natural resources and Thai culture.

There are three major development strategies based on the above mentioned strategic plan as follows:

(1) Increase Thailand's tourism revenue to 2.5 trillion baht by 2017 and distribute more income to local communities. Thus, Thailand was promoted as a "quality leisure destination," focusing on a high-value target and creating tourism opportunities for all groups of the Thai people.

(2) Raise the awareness of all sectors about balanced and sustainable development. The second strategy seeks to develop tourism products and services, facilitate travel for tourism, promote tourism safety, and develop the logistics system for tourism.

(3) Direct efforts towards stimulating high-quality markets, develop tourism products and services in response to the market demand, and enhance the efficiency of tourism management, with an emphasis on integrated operations and connections at national, regional, and local levels. The third strategy involves efficient tourism management by developing tourism personnel and information and improving related laws and mechanisms.

At the same meeting, 4th August 2015, the Cabinet endorsed the project to continue to promote the "Discover Thainess" campaign until the end of 2016. The campaign, which has been included in the national agenda, was launched in early 2015. It emphasizes the country's unique cultural treasures and the Thai way of life, and intends to attract first-time and repeat visitors to explore Thailand's new destinations. The Cabinet also agreed to the plan to extend the period to promote the tourism campaign for 12 provinces until the end of 2016. The 12 provinces that tourists should not miss include Lampang, Phetchabun, Nan, Buri Ram, Loei, Samut Songkhram, Ratchaburi, Trat, Chanthaburi, Trang, Chumphon, and Nakhon Si Thammarat. The campaign will support the Government's policy of income distribution. A report shows that the campaign for the 12 provinces, recognized as "12 Hidden Gems," is bearing fruit, as they have received more visitors.

Vision of Tourism development at National level:
"Build the foundation to develop and promote Tourism of Thailand to become high quality world-class destination on the basis of sustainability."

Vision of Tourism development in the Southern Andaman provinces:

"To become centre of world class marine tourism destination on the basis of sustainable tourism and community empowerment" (Andaman Paradise)

Mission:

1) Develop and rehabilitate tourist attraction as well as improving and maintain the standard of service at international standard level. (Higher Tourist & Stakeholder Satisfaction)
2) To develop logistic infrastructure in order to support tourism and agriculture industry as well as fostering the network at international level.
3) Improving and building trust and confidence in safety and security for Thai tourism industry
4) Balance economic development to improve overall quality of life and well-being of local people in the community. (Sustainable Growth)
5) To take care, manage, rehabilitate and conserve the natural resources and ecological systems by adopted the sustainable concept. (Environmental Protection)

Objective:

1) To achieve the strategic plan that has been set according with timeline
2) To increase number of tourist and revenue from tourism industry while boosting the tourism and agricultural products in Southern Andaman provinces
3) To enhance the quality of management in tourism industry including the quality of products and services in Southern Andaman provinces
4) To integrate sustainable tourism development by preserve the natural environment through active participation of people in the community.
5) To added value into the tourism destination & attraction.

Key performance Indicators (KPI)

(1) Percentage of increase in tourism revenue.
(2) Percentage of increase in tourist satisfaction.
(3) Percentage of increase in tourism network which meet the standard.
(4) Percentage of increase in value of agricultural products which support tourism industry.
(5) Percentage of increase in the natural areas that has been rehabilitate and conserve.
(6) Percentage of increase in entrepreneur and personnel in tourism industry that meet the quality standard of eco-tourism.

Strategic plan 1:

Aims at Management of basic infrastructure and service as well as natural resources and environment in order to achieve sustainability.

Strategy 1.1. Adjust and enhance the development of basic infrastructure and natural resources management

- Support the development of basic necessity for people in southern andaman provinces in order to achieve peaceful society.
- Build and develop risk and crisis monitoring & management tourism centre in southern Andaman provinces (to cope with terrorist, natural disaster, epidemics etc.)
- Accelerate development of network in logistics system to support tourism industry.
- Support the development and building of tourism route network within southern Andaman provinces.
- Build the awareness and responsibility about natural resources and environment within people who work in tourism industry and community.
- Support and promote the use of green energy especially from agro-energy that derive from local agriculture products such as palm oil.

Strategy 1.2. Develop the system for tourism management

- Build and develop the standard for tourism in Andaman provinces particularly in eco-tourism.

- Accelerate the building in developing carrying capacity standard of tourism attraction in southern Andaman provinces base on ecological capacity, tourism zoning, physical capacity etc.
- Improve on capacity building of local government in order to be able to plan and develop the tourism industry on the basis of local resources and wisdom of Andaman.
- Support the development of tourism personnel to meet with the quality standard by cooperate with education sector in response to the growth of tourism industry and economic in southern Andaman provinces.
- Enhance the efficiency and effective output for office of strategic planning for southern Andaman cluster provinces department.

Strategic plan 2:

Development of tourism products and services in according with natural cultural resources, agriculture, local livelihood of people in southern Andaman provinces.

Strategy 2.1. Development of place and attraction.

- Develop tourist attraction in connection to history, tradition, culture, nature and agriculture.

Strategy 2.2. Develop activities and products to promote tourism industry

- Organize an event that create environmental awareness and agricultural products that have a high importance economic value for people in Southern Andaman.
- Develop products and services such as souvenir that reflect the identity of Southern Andaman as well as meeting tourist need and satisfaction.
- Support and promote the management of food safety standard in response to the need of tourism industry in southern Andaman.

Strategy 2.3. Promote and develop tourism and hospitality business

- Build the network to create business opportunity to promote the investment and commercial activity of tourism industry in southern Andaman.

Strategic plan 3:

Integrated marketing administration

Strategy 3.1. Repeat customer marketing strategy

- Support the development of integrated repeat customer marketing strategy.

- Support the public relation of tourism in southern Andaman provinces to be more effective in attracting both domestic and international tourist.

Strategy 3.2. Marketing strategy aims at high quality tourist

- Develop integrated marketing strategy which can penetrate into high quality tourist segment especially in the target group consider as "emerging market"

Vietnam

Major touristic products and services focusing on the most promising on terms of growth

In addition cultural tourism, sea and island tourism are the priorities of Vietnam's tourism sector, strongly attracting both domestic and international tourism. Sea and island tourism is becoming a new trend in Vietnam and one of the key tourism products, helping transform tourism into one of the key economic industries in the country.

With a long coastline and 3,000 islands, the country has a rich potential for sea and island tourism development. Vietnam ranks 27th out of 156 countries in terms of coastline length and has many beautiful beaches, of which Da Nang beach is considered one of the six most attractive one on the planet by Forbes. Ha Long and Nha Trang are among top beautiful bays in the world. Vietnam formed three sea and island tourism centres – Ha Long, Da Nang and Nha Trang offering modern and luxury accommodation services.

Craft village tourism has also proved an attraction, receiving great attention from visitors, especially foreign tourists. Apart from improving product design and quality, tourism development is regarded as an effective solution to fully tap advantages of Vietnam's traditional craft villages. Vietnam has more than 2,000 traditional craft villages, focusing on 11 major fields including textile, wood, lacquer, ceramic, glass, embroidery, rattan, handicraft paper, wood carving, stone carving, copper and silver engraving.

The country offers a wide variety of products to meet market needs and takes advantages of the following strengths:

- Rich cultural traditions, heritage, festivals, ethnic groups, architectural momuments.
- Vibrant main cities, young energetic population
- New destination for holidays and exploring (Da Nang, Phu Quoc)
- Extensive and dramatic natural attractions
- Unique history of overcoming adversity, contemporary interest in war sites
- Iconic attractions: Hanoi, Halong Bay, Phong Nha, Hue, Hoi An, Ho Chi Minh City
- New high-quality resorts and hotels

- Boutique hotels in main cities
- Safe destination
- Generally not expensive
- Very strong domestic market underpinning destination viability and economic sustainability

Besides developing key products with competitive advantages, such as sea and island tourism, cultural tourism and eco-tourism, new tourism products including event tourism, adventure travel and medical tourism are expanded in Vietnam.

Main stakeholders and actors involved in the tourism industry and responsible for strategic development

As already mentioned in the beginning of this document, local stakeholders must be involved in the strategic development for achieving a sustainable tourism development (Byrd, 2007). Among tourism industry stakeholders, SMEs are key players. Out of all firms excluding the agriculture sector, SMEs account more than 90% in most economies, create the high rate of employment and generate both domestic and export earnings. They are the lead player of economic growth and can act as drivers of structural change (Sharafat, Rashid and Khan, 2014) that contribute to poverty alleviation.

Working closely with SMEs can be very effective and practical in finding solutions to sustainability. Cooperating with SMEs can avoid the bureaucratic procedures that are usually seen in larger enterprises. SMEs can often manage innovations much easier to keep up with the rapid changes in global tourism trends. Travellers looking for something unique often look for SME services, which have the ability to be successful in competing with international competitors through the local connections while being linked to global distribution value chains and networks (Imtiaz, 2008).

Partnering with SMEs also has advantages for potential investors. However, the real challenges SMEs are facing include limited competitiveness in the regional and international market, innovativeness, and most notably the lack of support from their home governments and international organisations. Severe credit conditions compared to large enterprises and equity financing make it difficult for SMEs to participate in international networking opportunities (Imtiaz, 2008).

Mass tourism is present also in this region, especially in Thailand and Vietnam. Is mass tourism compatible with sustainable tourism? What it can be stated for sure is that mass tourism is characterized by several unsustainable trends. The Ministry of Culture, Tourism and Sport, through its agency, the Vietnam National Administration of Tourism, is firmly in control of tourism in the country. Some shared responsibility at the provincial level and among private sector stakeholders.

The ministry sets policy, but there appears to be flexibility at the local level to develop and administer tourism activities. The ministry is responsible for all decisions related to tourism; however, the provinces are empowered to make local-level decisions on tourism development and administration.

Main strategies for tourism development

The main strategies for tourism and travel development in Vietnam by 2020 and with a vision to 2030 are detailed in the following pages.

- Strategy for tourism products development aims to:
    - Develop a tourist product system that is unique, diverse and uniform, with high quality and high added value, meeting the needs of domestic and international tourists; to develop "green" tourism products, respecting natural elements and local cultures;
    - Plan and invest in tourism product development based on outstanding strengths and attractions of tourism resources; to prioritize the development of marine tourism, cultural tourism and eco-tourism; to step by step form systems of national and local tourism areas, routes, destinations and tourism urban areas;
    - Take advantage of strengths and strengthening the links between regions and localities towards the formation of specific tourism products of each tourism area:

        (1) Midland and mountainous areas in North Viet Nam, including Hoa Binh, Son La, Dien Bien, Lai Chau, Yen Bai, Phu Tho, Lao Cai, Tuyen Quang, Ha Giang, Bac Kan, Thai Nguyen, Cao Bang, Lang Son and Bac Giang Provinces, are featured with eco-cultural tourism associated with exploration of cultural identities of ethnic minorities.

        (2) Red River Delta and coastal Northeast, including Ha Noi, Hai Phong City, Vinh Phuc, Bac Ninh, Hai Duong, Hung Yen and Thai Binh, Ha Nam, Ninh Binh, Nam Dinh, Quang Ninh Provinces, are characterized by sea sightseeing, cultural tourism associated with values of the wet rice civilization and local traditional activities, urban tourism, MICE (Meetings, Incentives, Conferencing, Exhibitions) tourism.

        (3) North Central region, including Thanh Hoa, Nghe An, Ha Tinh, Quang Binh, Quang Tri and Thua Thien-Hue Provinces, is characterized by tours to explore world cultural and natural heritage sites, marine tourism, eco-tourism, historic-cultural exploration.

        (4) Coastal South Central region, including Da Nang City, Quang Nam, Quang Ngai, Binh Dinh, Phu Yen, Khanh Hoa, Ninh Thuan and Binh Thuan Provinces, is distinguished in marine and resort tourism associated with the exploration of heritages, marine culture and cuisine.

        (5) Central Highlands, including Kon Tum, Gia Lai, Dak Lak, Dak Nong and Lam Dong Provinces, have eco-tourism and cultural tourism exploiting the unique cultural values of indigenous ethnic groups.

(6) Eastern South Viet Nam, including Ho Chi Minh City, Dong Nai, Binh Duong, Ba Ria-Vung Tau, Binh Phuoc, and Tay Ninh Provinces, is featured with urban tourism, MICE tourism, culture and history exploration, marine ecological and resort tourism.
(7) Mekong Delta, including Long An, Dong Thap, An Giang, Kien Giang, Ca Mau, Bac Lieu, Soc Trang, Ben Tre, Tra Vinh, Vinh Long, Tien Giang, Hau Giang Provinces and Can Tho City, has eco-tourism, river life culture, marine ecological and resort tourism, and MICE tourism.

- Strategy for tourism infrastructure and technical facilities development aims at:

  - Planning and investing in infrastructure development in terms of transport, information and communications, energy, water supply and drainage, environment and related fields to ensure a uniform system for tourism development; modernizing the public transport network; planning public spaces;
  - Upgrading and developing social infrastructure of culture, health, and education, especially museums, theatres, clinics, training and educational establishments, with sufficient conveniences and facilities for tourists;
  - Developing the technical infrastructure system that ensures quality, modern, convenient and uniform tourism services and facilities, to meet the needs of tourists. Such a system includes tourist attractions, accommodations, restaurants, information service, travel advice, booking and reservation service, travel agents, tour operators, tour guides, vehicles and transport service establishments for tourists, service facilities for sightseeing, leisure, entertainment, sports, conference and other purposes.

- Strategy for training and nurturing human resource in tourism is focusing on:

  - Developing human resources for tourism, so that quality, quantity, sectoral structure and standards of training all meet requirements of tourism development and international integration;
  - Developing a network of strong tourism training establishments with modern and uniform technical and teaching equipment; standardizing the quality of lecturers; standardizing the framework curriculum for tourism training;
  - Crafting and implementing strategies, planning schemes and plans on tourism human resource development in accordance with the needs of tourism development in specific periods and regions; step by step standardizing tourism human resources with regional and international standards, paying special attention to tourism managers and skilled labour;
  - Diversifying training methods; encouraging on-the-job training and self-training according to the needs of businesses.

- Strategy for market development, tourism promotion and brands is looking for:

  - Development of tourist markets:

(1) Selectively attracting market segments of tourist with high affordability and long-stay;
(2) Pushing up the domestic tourism market, focusing on the market segment of tourists of convalescence, entertainment, weekend relaxation and shopping purposes.
(3) Further attracting international tourists coming from Northeast Asia (China, Japan, Republic of Korea), Southeast Asia and the Pacific (Singapore, Malaysia, Indonesia, Thailand, Australia); Western Europe (France, Germany, Britain, the Netherlands); Northern Europe; North America (US, Canada) and Eastern Europe (Russia, Ukraine); expanding and luring tourists from new markets, such as the Middle East and India.

- Tourism promotion:

  (1) Boosting tourism promotion in the direction of professionalism, aiming at the targeted markets, with tourism products and brands as the focus; attaching tourism promotion with the dissemination of the nation's images;
  (2) Designing and implementing tourism promotion plans and programs at home and abroad, with flexible forms for each period of time and consistent with the objectives identified; attaching tourism promotion to trade promotion, investment promotion, diplomacy and cultural exchange.

- Development of tourism brands:

  (1) Developing the national tourism brand on the basis of the development of regional and local tourism brands, tourism enterprise brands and tourism product brands;
  (2) Placing importance on the development of tourism brands with strong regional and international competitiveness;
  (3) Strengthening the coordination between sectors, administrative levels and localities in the construction and development of tourism brands to ensure consistency.

- Strategy for tourism investment and policies:

  - The State should offer preferential policies to support investments in tourism infrastructure, human resource training, tourism promotion and brand development; link and mobilize resources for capacity building and quality improvement of tourism service providers, forming tourism centres of regional and international standards;
  - The investment priority lies in the development of national tourism centers, attractions, and urban areas, as well as tourism routes and destinations in remote areas or regions of socio-economic difficulties, which have potential to develop tourism;
  - Implementing sustainable development policies; designing preferential policies for the development of eco-tourism, "green" tourism, community tourism, and responsible tourism;

- Implementing policies to encourage social engagement in and attraction of domestic and foreign investment sources for the development of tourism technical infrastructure, human resource and tourism promotion.

- Strategy for international cooperation in tourism

  - Implementing proactively and effectively bilateral and multilateral cooperation agreements signed;
  - Boosting international tourism cooperation with other countries and international organizations, linking Viet Nam's tourism market with regional and world tourism markets;
  - Expanding bilateral and multilateral cooperation relationships in order to enlist the support of other countries and international organizations, so as to accelerate Viet Nam's tourism development and integration, heightening the image and status of Viet Nam's tourism in the international arena.

- Strategy for State management in tourism

  - Perfecting tourism and tourism-related institutions, mechanisms and policies; amending and supplementing the Law on Tourism to create a favourable legal environment for tourism development;
  - Strengthening the capacity of state management agencies on tourism from local to central levels to the meet the requirements of development; boosting the coordination and connection between tourism and other sectors, among regions and localities for tourism development;
  - Designing strategies and planning schemes for tourism development with high quality and feasibility; the State focuses on planning and investing in the development of tourism regions, national tourism sites, attractions and urban areas;
  - Reckoning, monitoring and managing customer flows and norms of outbound travel in relation to continuously improving the quality of domestic tourism activities;
  - Enhancing the application of industry standard systems; boosting inspection and supervision in order to control and maintain the quality of tourism products and services; forming a testing, evaluation and management system for the quality of the tourism sector, thereby creating a healthy competitive environment in the sector;
  - Further decentralizing management while ensuring the State's macro-level management as well as encouraging businesses' pro-activeness and dynamic and local communities' active participation. Enhancing the role and responsibility of local authorities in maintaining the civilized environment, social safety, public order and security in tourism areas and attractions;
  - Continuing to reform state-owned enterprises in the tourism sector through equitizing the entire state capital; encouraging the development of tourism businesses which possess strong potential and brands; focusing on the development of small and medium tourism enterprises, especially households, in association with the development of community tourism and tourism in rural and remote areas;

- Boosting the research and application of scientific and technological advances in tourism management and business, training tourism human resources, market survey and tourism promotion;
- Raising awareness of all administrative levels, sectors and the whole society about the position and role of tourism to the country's socio-economic development; giving prominence to social and environmental responsibility in all tourism activities.

The "Strategy on Vietnam's tourism development until 2020, vision to 2030" is considered the main tourism development strategy. Given the national context, this strategy focuses on the development of infrastructure and technical facilities for tourism.

According to the strategy, the planning and investment in infrastructure development will include:

(1) Transport, information and communications, energy, water supply and drainage, environment and related fields to ensure a uniform system for tourism development;
(2) Modernizing the public transport network;
(3) Planning public spaces;
(4) Upgrade and develop social infrastructure of culture, health, and education, especially museums, theatres, clinics, training and educational establishments, with sufficient conveniences and facilities for tourists;

The strategy emphasizes on the need of developing the technical infrastructure system that ensures quality, modern, convenient and uniform tourism services and facilities, to meet the needs of tourists. Such a system includes tourist attractions, accommodations, restaurants, information service, travel advice, booking and reservation service, travel agents, tour operators, tour guides, vehicles and transport service establishments for tourists, service facilities for sightseeing, leisure, entertainment, sports, conference and other purposes.

Under this strategy, the government is planning to offer preferential policies to support investments in tourism infrastructure, human resource training, tourism promotion and brand development; link and mobilize resources for capacity building and quality improvement of tourism service providers, forming tourism centres of regional and international standards.

The investment priority lies in the development of national tourism centers, attractions, and urban areas, as well as tourism routes and destinations in remote areas or regions of socio-economic difficulties, which have potential to develop tourism;

The Government will implement sustainable development policies and design preferential policies for the development of eco-tourism, green tourism, community tourism, and responsible tourism;

Other policies to encourage social engagement in and attraction of domestic and foreign investment sources for the development of tourism technical infrastructure, human resource and tourism promotion will be also mentioned in the strategy.

Regarding Vietnam, In the "Strategy on Viet Nam's tourism development until 2020, vision to 2030" approved by Prime Minister Nguyen Tan Dung in Decision 2473/QĐ-TTg dated December 30, 2011 and the Resolution 08-NQ/TW on developing tourism into a key economic industry released by Vietnam Poliburo in 2017, the perspectives of the Vietnam's tourism industry are:

- To develop tourism into a key economic sector, accounting for an increasing proportion of GDP, creating a driving force for socio-economic development;
- To develop tourism in the direction of professionalism and modernism, with focal point; to focus on in-depth development, assuring quality and efficiency while affirming brand and competitiveness;
- To develop simultaneously domestic and international tourism; to pay attention to international inbound tourism; to strengthen the management of outbound tourism;
- To develop sustainable tourism tied to the preservation and promotion of cultural values of the nation; to ensure landscape preservation and environmental protection; to maintain security, national defence, social order and safety;
- To promote social engagement in and mobilize all domestic and foreign resources for investment in tourism development; to make full use of the national potentials and advantages in terms of natural factors, national culture and characteristic strong points of each and every region throughout the country, to strengthen the connections for tourism development.
- By 2020, tourism would have basically become a key economic sector, modern and professional, with relatively uniform technical infrastructure; tourism products would have high quality, diversity and prestige, and they are imbued with national identities and able to compete with other countries in the region and the world.
- And by 2030, Viet Nam strives to become a nation with a developed tourism sector.

3.2. Sustainable tourism in Southeast Asian

3.2.1. Enough tourists?

Southeast Asia is a regions with high potential for wealth and is expected to see further economic growth. However, the way of developing its economy and its tourism sector might be in contradiction with the sustainable development objectives.

It should be also underlined that PATA Asia Pacific underlined that during the period 2014-2018:

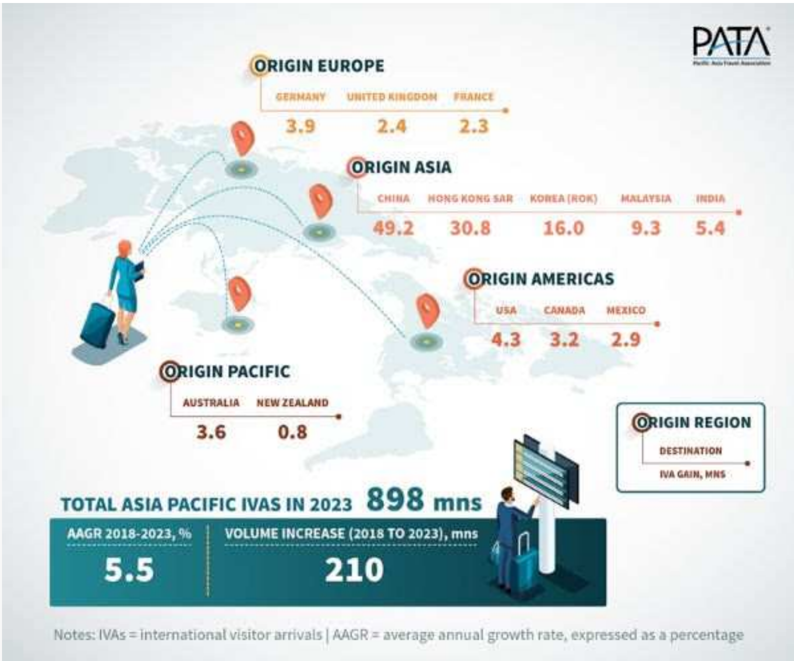
- ✓ Visitor arrivals to the overall Asia Pacific region continued to grow at an average rate of 6.5% per year;
- ✓ Southeast Asia has shown the strongest average annual growth rate at 13.3%, followed by South Asia (7.3%);

- ✓ Under a rapid expansion of the Asian middle-classes together with their intense interest in international travel, Asian source markets into Asia Pacific have increased from 338.6 million in 2014 to 461.0 million in 2018, i.e. 8.0% yearly growth;
- ✓ In percentage growth terms, Russian tourists into Asia Pacific have increased at about 20% per year, reaching an inbound volume of close to 15 million in 2018.

What´s the forecast for the following years?

Over 757 million international tourist arrivals are expected to be received in 2021 by Asia Pacific, the majority coming from Asia, especially from Northeast Asia (over 51%) and followed by Americans.

Figure 11. Asia Pacific international tourist arrivals forecast for 2023.



Source: PATA (2019).

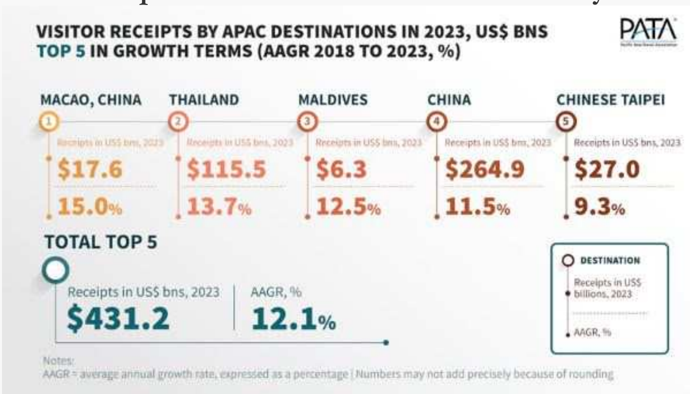
Between 2018 and 2023, Asia Pacific is estimated to receive 210 million additional foreign arrivals, 73.7% from Asian origin markets, 10.9% from European markets and 10.1% will come from origin markets in the Americas. The strongest Asian generators of additional tourist arrivals will be led by China and Hong Kong.

It is worth mentioning the case of Thailand, within the top five inbound ranking by absolute volume of foreign tourist arrivals into Asia Pacific in 2023. Germany, the United Kingdom and France are expected to be the strongest gains in the absolute volume of arrivals coming from Europe, while the Russian Federation will make up the top five origin markets out of Europe. From the Americas, the

USA, Canada and Mexico will generate the most additional volume of arrivals. Australia and New Zealand seems to be a strong supplier of additional foreign arrivals coming from the Pacific.

Thailand is also expected to be within the top five in terms of tourist expenditure in the region with over 115 billion US$ by 2023 and 13.7% growth rate between 2018-2023 (figure 12).

Figure 12. Forecast of top 5 Asia and Pacific destinations by tourist expenditure.



Source: PATA (2019).

Tourism plays an important role in the economic development of many countries from this region, but the case of Thailand is remarkable where tourism is the second most significant pillar of the economy contributing to the Thai GDP in about 12% in the last years. Thailand, with a vast availability of natural beauty in Southeast Asia, accumulates high income from tourism. Since 2014, the level of incomes from tourism were accounted for about 2000 THB annually, becoming the tenth most income-generating country through tourism industry (Chulaphan and Barahona, 2017).

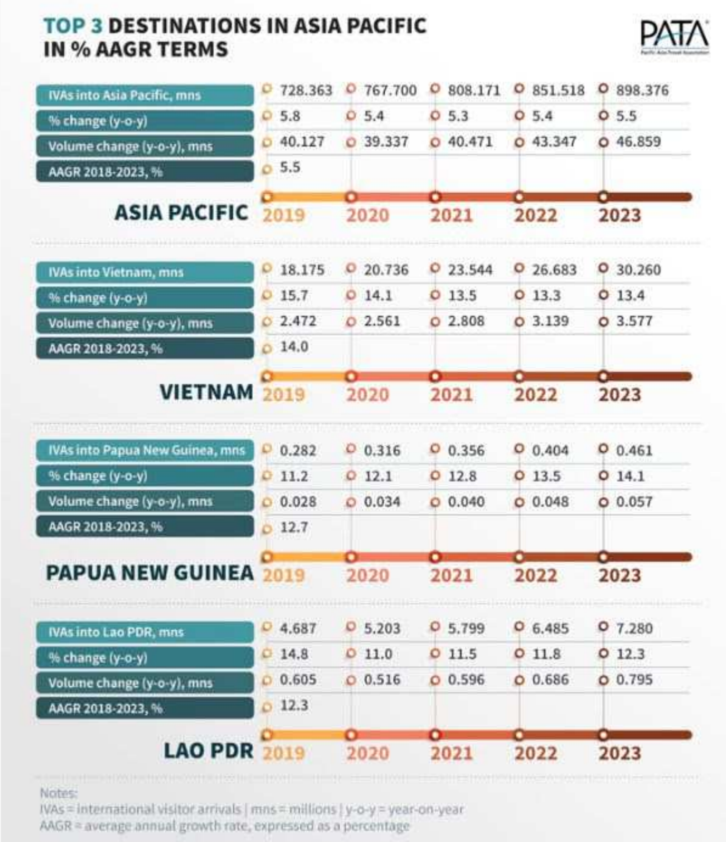
Table 8. Contribution to the Thai GDP: 2010-2017

Indicators	2010	2011	2012	2013	2014	2015	2016	2017
T&T direct contribution to GDP (US$ in bn)	20.8	24.7	28.7	33.9	31.5	35.0	37.3	42.2
T&T total contribution to employment (thousands)	1914	1807	2185	2477	2008	2257	2303	2337
T&T visitors export (US$ in bn)	23.6	30.8	37.6	45.6	41.9	48.4	52.3	59.6
T&T capital investment (US$ in bn)	5.0	6.1	6.8	7.1	6.1	6.6	7.1	7.7

Source: World Travel and Tourism Council database.
Note: T&T denotes (Travel and Tourism).

However, Vietnam is predicted to lead Asia Pacific destinations in terms of its average annual growth rate over the next five years (*Asia Pacific Visitor Forecasts 2019-2023 Full Report*, PATA 2019). As shown by Figure 13, while the Asia Pacific average growth rate will be of 5.5% between 2018 and 2023, Vietnam is expected to register an average growth rate of international tourist arrivals of over 12%.

Figure 13. Average growth rate of international tourist arrivals in Asia Pacific: 2018-2023



Source: PATA (2019).

As already mentioned in the beginning of this document, local stakeholders must be involved in the strategic development for achieving a sustainable tourism development (Byrd, 2007). Among tourism industry stakeholders, SMEs are key players as they represent about 90% of the industry and creating a rate of employment and generating both domestic and export earnings. Thus, as promoters of economic growth, they might contribute significantly to the structural change (Sharafat, Rashid and Khan, 2014) and to poverty alleviation.

In this sense, Kaiwa (2017) underlines that working directly with SMEs might: (1) facilitate finding solutions to sustainability; (2) avoid the bureaucratic procedures that are usually more present in larger companies; (3) be easier to manage innovations by SMEs and keep up with the rapid changes in global tourism trends; (4) bring advantages for potential investors; (5) be successful in competing with international competitors through the local connections while being linked to global distribution value chains and networks (Imtiaz, 2008).

However, SMEs have to face several challenges which makes them more vulnerable under certain conditions: (1) limited competitiveness in the regional and international market; (2) limited funds and/or access to innovation; (3) the lack of/insufficient support from their governments and international organisations; (4) Severe credit conditions compared to large enterprises and equity financing make. All these aspects make a lot more complicated the integration of SMEs in international networks, and thus there is a reduction of opportunities based on low/no information and access to global networks (Imtiaz, 2008).

Mass tourism is present also in this region, especially in Thailand and Vietnam. Is mass tourism compatible with sustainable tourism? What it can be stated for sure is that mass tourism is characterized by several unsustainable trends.

3.2.2. Financial funding for tourism projects

Thailand

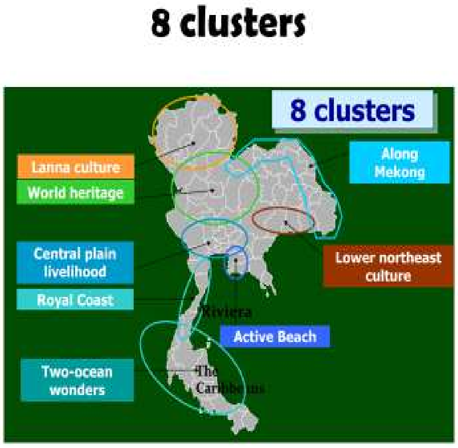
The Thai government has focused on economic reforms aimed at raising Thailand's potential growth to achieve high income and inclusive growth as envisioned in the new 20-year national strategy. Initial steps taken are promising. Some highlights from the on-going reform efforts include:

1. Eastern Economic Corridor (EEC). The EEC is a special economic zone that extends the Eastern Seaboard, a manufacturing hub. The corridor is intended to accommodate investment in targeted industries such as next-generation cars, smart electronics and affluent medical and wellness tourism. Under the EEC bill, certain laws will be waived to eliminate legal restrictions regarding skilled labour and foreign investments such as the foreign holding limit. The EEC policy committee recently approved infrastructure development projects worth almost THB 700 billion for the eastern seaboard, consisting of high-speed train railway, an airport, and extension of a deep-sea port and an industrial estate. a. The four projects consist of the high-speed train route from Bangkok to Rayong (THB 215.1 billion), U-tapao Rayong-Pattaya International Airport and aviation city (THB 310.38 billion), Phase 3 development of Laem Chabang deep-sea port (THB 155.83 billion), and phase 3 development of the Map Ta Phut industrial estate (THB 10.15 billion).
2. State-owned enterprises (SOE) governance. The SOE sector has been plagued by financial weakness, inefficiency, political interference, and sector interests. The State Enterprise Policy Committee (SEPC) was appointed by the current government to overhaul the structure of state enterprises. The SEPC will set strategy for SOEs and establish a national holding company to hold the assets of SOEs that have clear commercial mandates (i.e. PTT, Thai Airways International, TOT, CAT, Krungthai Bank, MCOT, Transport Co, Airports of Thailand, Thailand Post, Thanaluk Pattana Subsin, Bangkok, and Aeronautical Radio of Thailand). Other international examples of such a state holding structure include France's Agency for State Holdings, Kazakhstan's Samruk Kazyna and Singapore's Temasek. The corporate structure provides a clear and transparent framework for investment, commercially driven restructuring and streamlining, and divestiture and will allow Thailand to better meet

its infrastructure challenges. For example, the long-pending Suvarnabhumi airport phase 2 expansion is being implemented by AOT. In fact, SOEs are responsible for implementing most public infrastructure investment. The cabinet has approved legislation for the holding company. One important element of the legislation and regulation is the board selection criteria that will be crucial for minimizing political interference and sector interests as originally intended by the lawmakers. The issue of privatization currently remains off the table. The cabinet has approved the law and regulations are currently being drafted.

3. Specialized financial institutions (SFIs) supervision. SFIs comprise around 22 per cent of Thai financial institutions' assets.5 The Bank of Thailand is now the sole regulator and supervisor of SFIs last year after several state-backed banks saw rising bad loans due to imprudent lending and quasi-fiscal policies. This role was enshrined in the revised Financial Institutions business act in late 2016 and mitigates the conflict of interest inherent in the previous arrangement in which the Ministry of Finance set strategy for the SFIs while also supervising and regulating the SFIs. This transfer of oversight authority will also improve supervision and transparency by upgrading the supervisory regime to be more line with that of commercial banks. The new supervisory regime will ensure that the SFI's credit process, corporate governance, and capital and liquidity buffers are in line with Basel II standards. More importantly, it also limits the government's ability to abuse SFIs for quasi-fiscal policies. The MOF will continue to set strategy and nominate executives for approval by the BOT while being responsible for losses incurred from policy lending as identified through, for example, Public Service Accounts. An SFI Fund will also be set up through levies on SFI deposits, similar to the Deposit Protection Agency for commercial banks. The SFI Fund will be used to recapitalize SFIs facing financial difficulties. BOT has already set up a new SFI supervision department and begun issuing regulations to cover the governance, profitability and accountability of SFIs early this year. Implementation and assessing losses due to previous government policies Taxes. Ongoing tax reforms are aimed at addressing wealth inequality, improving the competitiveness of the tax structure, streamlining tax administration and expanding the tax base. While Thailand's tax revenue-to-GDP ratio of 17 percent is comparable with other East Asian countries and rapidly growing economies, there is still room to expand the tax base particularly in light of Thailand's infrastructure investment plans.

Figure 14. Thai clusters



Vietnam

The financial perspective of the Vietnamease tourism sector is depicted bellow according to the lines of the local, regional and/or national budget

The tourism sector will have a large budget of VND 400-500 billion to carry out marketing activities in 2013-2025 period.

The fund's capital will be sourced from the state budget (in the first three years of operation, VND100 billion a year), 10 percent of revenue from visa granting fees, and 5 percent of revenue of the state's collections from sightseeing sites and other sources.

Moreover, improvement (if any) and decline of budgetary lines dedicated to tourism were experienced between 2000 and 2012 as the budget spent on tourism was around VND410 billion (VNAT), a modest figure compared to neighbor countries.

3.2.3. Towards sustainable tourism strategies

Thailand

Before entering in the requests needed for a proper implementation of sustainable tourism strategies, it is necessary to have a clear view of the SWOT analysis carried out during the focus group. As such, the table bellow depicts the main aspects in this regard.

Table 9. SWOT analysis of the Thai tourism industry

Strengths	***Weaknesses***
• Chiang Mai is a province with a unique "Lanna culture" reflected in its people, food, and identity. This is especially relevant for local tourists who come from other provinces. • The overall foreign language skills (especially English)of people working in the tourism sector in Chiang • Chiang Mai has a relatively low crime rate and the city's image is of a safe family destination in comparison to other major tourist regions in Thailand • Chiang Mai has many local specialty products such as Silk, Coffee, Natural Beauty as well as services such as Thai Massage and Spas • The quality of service offered by those working in the tourism industry is one of the major strengths • The natural beauty and diversity of the North leading to its Eco-Tourism offerings. This includes the national parks as well as other tourist activities such as elephant camps, hiking, rafting, etc. • The climate in Chiang Mai, especially the winter season, which draws both local and domestic tourists. • The region weather and climate. • Rich tourism resources. • More income from purchasing the local products • Exchange experience with the visitors • Creating the unity and harmony within the community • Improve how to contact, speak, and prepare readiness to welcome the tourists • Developing local people personality • More research about local value resource • Encourage local people to keep home clean • Generating new knowledge within community as local herbs, local wisdom. • Hospitality of local people/employee • Diversity of tourism attractions/products/ services –street food (Michelin award) • Uniqueness of tourism attractions – local culture • Good value for money – Thailand is big agricultural product producers	• Air transportation is a significant weakness for Chiang Mai and the North. International flight connections are limited with currently only 1 airline flying westward from Chiang Mai (Qatar) and most itineraries requiring a connection through Bangkok. • Public transportation in Chiang Mai is limited with no mass-transit infrastructure • There is little to no cooperation between government agencies and tourist companies and there is an overall lack of communication in terms of development and implementation of government policies affecting the industry • The province does not really have a brand or image, especially in terms of marketing to inbound tourist companies. • Often the infrastructure and logistics chain are not developed with tourism in mind and thus are not sufficient to support the projected growth in the sector • The IT infrastructure in more remote areas needs to be upgraded in order to provide the required level of communication services expected by overseas and domestic tourists • Lack of minimal amenities for visitors. • The natural resources destroyed. • The conflict of interest between community and outside investors • The conflict within community cause of irrationally distribution benefit • Some group of people in the community does not still understand the tourism and sustainable meaning. • Some tourism staff cannot allocate their time to service tourists in accordance with responsibility. • Over consumption. • Lack of health. • Low Competence of labour in tourism industry – due to education system • Legal system – outdated and not support well tourism businesses. Also lack of law enforcement. So some businesses can violate the law. • Shortage of Thai labour in lower skill job and subsequently need to employ foreigners. So the businesses lost Thai hospitality and Thainess.

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and has reasonable cost of labour resulted in inexpensive products/services in tourism. • Good Management (in general) – strategies, structure, management system, and participation of all parties • Eastern region is one of the competitive destination in tourism and there has a variety of tourism resources, not only for scared resources like natural attractions, agro-tourism sites, cultural heritages, but also the man-made attractions and a lot of artificial categories of tourism products and services. • Strengthened community network on conserved natural environment, further to activities concerning the participatory promotion and learning center for discussion, deciding, co-working, and solving problem solutions of the communities. Which are effective on managing the dynamic changing of the situation and affecting to the sustainability of its community.	• Educational system – not support tourism development, not be able to provide well –trained labours for tourism industry e.g. shortage of Arabic speaking workers to serve middle East tourists. Education system does not provide sufficient managerial skills for personnel for tourism industry. In addition the education system does not produce entrepreneurs but only provide labour for business as employee. Educational institutions teach out-dated knowledge. • Unethical practices among some SMEs in the industry • Government budgetary system does not support tourism development e.g. inconsistency with the tourism project, complication of budget application causing delay, not flexible etc • Too much profit-oriented for some SMEs. Not focus on Thainess which is generous. • Deterioration of natural Environment due to lack of control e.g. building resort business in the national park. • Too much depending on Chinese market (30 % of all foreign touritss). This may affect the industry if there is a change in demand of this market. • Lack of cooperation among SMEs in the whole system causing lack of bargaining power • Social problem e.g. crime, drug etc. • Lack of knowledge and understanding when dealing with international partners and new technology used in the industry causing lack of bargaining power. For example, hotel owners sell their hotel rooms for the whole year to booking.com with low price but booking.com can resell and get much more • No planning for man power in tourism industry • Imbalance of visitor management in terms of zoning. • Shortage on manpower and development of potential human capital, due to most of the communities in the East of Thailand have an aging leader and/or retired persons. • Infrastructure in terms of transportation and logistics in some areas still not facilitated, there is no linkages to the destination even if they have, but still inadequate standardized
Opportunities • There is ample opportunity to launch new festival concepts such as a winter festival. Chiang Mai currently has a limited number of festivals	***Threats*** • Inbound mass tourism, especially from large tour companies catering to "Zero-dollar" tourists is putting an unsustainable burden on the local

spread throughout the year and with the increase in inbound tourists from China, there is room to create innovative programs of interest to this core market • Chiang Mai already has a vibrant and development local tourism industry. However, this is mainly in already well known tourist centers. There are several outlying provincial areas such as Phraeo, which are within 2 hours of an international airport and have natural beauty attractions which can be developed. • Chiang Mai can become a leader in sustainable tourism, both at the policy level as well as the tourist offerings available. The collaboration between educational institutions, government policy makers and the tourism industry will be key to this succeeding. • The current national government infrastructure policy means that the plan to build a high-speed rail connection between Chiang Mai and Bangkok could increase the connectedness of the province. Additionally, the current discussions on the potential to link this rail network to China and India would offer opportunities. • The government recently announced the opening of a tender for a new international airport to be built near Chiang Mai. Projected to open in 2025, this new airport will greatly increase the availability of flights to both domestic and international destinations. • Global trend. • Greening competitiveness for hotels and tourism. • Many partnerships for sustainability. • Increase of sustainable tourism. • Government policies encourage secondary tourism cities to supplement primary tourism cities • High economic growth of Asian countries e.g. China, India result in increasing demand for tourism. • New channel of communication via ICT creating marketing opportunities • Development of transportation and related system e.g. cruise line, development of aircraft, booking system, railway system in GMKS etc • Emerging trend in tourism creating new demand for Thailand e.g. cruise, health, food (gastronomy), wellness (e.g. spa lanna), sport, senior, accessible etc	ecosystems and society • Changes in the local climate related to global warming have already affected the high season during winter with warmer temperatures and a longer hot season shortening the window of opportunity for tourism related activities • The lack (real and perceived) of effective law enforcement has led to numerous negative images of the province. This has been seen in forest encroachment and tourist attractions safety violations. As the tourism industry continues to expand, this relaxed attitude to enforcement may cause significant damage to the industry. • Government regulations related to tourists, such as the plan to track SIM cards, visa policies, internet control and others, all threaten to damage Thailand's overall attractiveness as a tourist destination • Chiang Mai is culturally still relatively conservative and this means that some local regulations and customs can impede the development of the tourism sector. As an example, overflying of temples is prohibited meaning aerial tours of tourist attractions is severely limited. This also limits the innovation in the industry • Changes in the social structure of the area • Tourism consumer fatigue. • Global economic crisis. • Global market system – lower bargaining power e.g. Chinese tourists can bargain as they have many choices of travelling • Political instability of Thailand • Epidemic in some period • Natural disaster • Global political policies • World economy • Global rules and regulations e.g. GDPR (started 25 May 2018) may affect SMEs • Oil price • War • Human trafficking and inability to protect human right in Thailand • • destroy country reputation

• Emerging of CLMV destination can link to Thailand. For instance, Tourists who come to Cambodia will stop by Thailand • Digital destination – smart city e.g. Phuket, Chiang Mai • Governmental policies to promote the CBT is increasingly, which affecting to exploitation of the communities has been raising up, recovering from the regulators (public organisation). Whereby the most influences of this implication can be concluded as it is an approaching of the development master plan called "Eastern Economic Corridor" (EEC), whereby the strategic locations are the provincial areas of Chonburi (Pattaya City included), Rayong, and Chacheongsao Provinces.	• Nomination of foreigners in local business – destroy local businesses • Industrialisation extended into the Eastern area, which the scattering of the local people in the community can be spread out to work in the industrial estate, instead of make a living in their hometown or community

Source: experts who participated in the focus groups organized under the TOURIST Erasmus + project

Vietnam

Before entering in the requests needed for a proper implementation of sustainable tourism strategies, it is necessary to have a clear view of the SWOT analysis carried out during the focus group. As such, the table bellow depicts the main aspects in this regard.

Table 10. SWOT analysis of the Vietnamese tourism industry

Strengths	***Weaknesses***
• Rich and typical natural resources for ecotourism development both in natural and cultural ones, over 30 national parks, 69 natural reserves, 45 landscape protection sites, and 54 cultural groups. They may include Cuc Phuong National Park, Ba Be Lake, Hoang Lien National Park, Khe Ro Forest, etc. Moreover, cultural value is represented in Vietnam's approximately 100 traditional festivals. • Enormous tourism – particularly ecotourism – potential with 13,000 floral species and over 15,000 faunal species, three newly discovered big animal species, and a ratio of country/world species of 6.3%. • Stable politic and social security. Vietnam has been selected as one of the safest tourist destinations in the world. • Significant improvements in infrastructre inlcuding roads, public transportation, airports, and seaports, etc. • Quite various types of tourist activities (both mountainous and coastal, pure natural and natural-cultural) • Good telecommunication (wifi) • Good geographical and political position within the Asian • Regarding the strengths of the sustainable development of marine tourism and culture in Vietnam, it is necessary first to mention the institutional and policy advantages that reinforce the development of these types of tourism. Specifically, the Government has issued Decree No. 109/2017 / ND-CP on the protection and management of the World Heritage cultural and natural sites in Vietnam in 2017; Law on Environmental Protection No: 55/2014 / QH13 in 2014 and Tourism Law No. 09/2017/QH14. In addition, the Ministry of Tourism is also publishing sustainable development strategies in 2020; Vietnam tourism development plan 2020 vision to 2030; Tourism development strategies to 2020 as well as development and conservation plan of World Heritage sites in Vietnam. • Additionally, Vietnam has established National Advisory Council for Tourism and Steering Committee for Tourism Development at both national and local level in some localities. Moreover, the Central Resolution No. 8 of the Politburo also mentions the strengthening and support for tourism development. On the other hand, the Government has established a Tourism Development Assistance Fund to promote tourism as a key economic sector in accordance with the national development vision and orientation in the coming years. • In addition to the strengths of the institutions and policies, it cannot fail to mention the diversity of natural and human resources of Vietnam. Dubbed the "golden forest", "silver sea", Vietnam is privileged with rich resources for the tourism industry. Moreover, Vietnam is considered a destination of heritage thanks to 26 heritage sites recognized by UNESCO to date. In particular, the	• Limited educational activities on ecotourism and sustainable tourism. • Inappropriate investment: Ecotourism needs investment in human resources (especially tour guides), management, and fundamental research and planning focused on the natural environment of proposed ecotourism sites. Meanwhile, domestic and international investors have preferred to focus on infrastructure like hotels and restaurants. • Weak management and linkage. Most resorts—beaches and other popular sites—are under the management of provincial tourism departments. • Overlapping jurisdictions at the tourist sites: For example, the management boards of National Parks are under the Ministry of Agriculture and Rural Development; those of Nature Reserves and Cultural, Historical and Environmental Forests are under Provincial and City People's Committees • Lack of services and good tourist operators • Uncontrolled service quality • Lack of financial fund for local businesses • Lack of skilled workers • No typical goods/products to sell • Weak English capability for both tourism labours and tourism-related businesses' (e.g. taxi drivers, shopping mall, etc) • Despite the promulgation of the regulations on tourism, the policies have been outdated, slow in renewing and updating. In spite of the sustainable development strategy of Vietnam 2020, there is no sustainable development strategy for Vietnam. At the same time, the implementation of strategies and mechanisms is ineffective. This can be due to the lack of resources and finance during the implementation process. • In fact, despite the fact that Vietnam has a diverse tourism destination system, no DMOs management board has been established to better manage and advise on tourist destinations, especially marine and culture destinations. • Besides, there is lack of support and linkage among stakeholders due to the lack of coordination mechanisms and awareness, especially between the public and private sector. In addition, in order to strengthen and develop the tourism industry, beside natural resources, human resources, especially experts and financial resources, are very important. The lack of and weaknesses in these two may result in ineffective marketing and promotion of Vietnam's destinations. • Another notable weakness in the sustainable development of marine and culture tourism is the lack of major infrastructure and support such as public toilets at tourist sites, public facilities such as buses, shuttle buses, etc. At the same time, access to the destinations is quite poor both in terms of traffic system and

most outstanding heritage site is Phong Nha - Ke Bang National Park (Quang Binh) in terms of natural heritage; the ancient city of Hue (Thua Thien Hue) in terms of cutural heritage; and the complex of Trang An (Ninh Binh) in terms of mixed heritage... • Besides, Vietnam also has unique and attractive natural resources as well as natural and cultural heritages in comparison with other countries in the world. • The Vietnamese people are also an indispensable strength. The people here include local communities, indigenous cultural values, human resources in the tourism sector. • Up until now, significant improvements in infrastructure including roads, public transportation systems, international airports, seaports, etc. have effectively facilitated the tourism industry as well as improving the tourism service quality. • In addition, the political stability and social security are also a great advantage for the tourism industry in general and Vietnam's tourism in particular. Vietnam has been selected as one of the safest tourist destinations in the world as safety needs are the most basic needs if not the most interest of tourists today. • From the point of view of the businesses, they believe that tourism enterprises have offered rich and diverse marine and cutural tourism products, bringing many choices for visitors.	communication system, online access. These restrictions greatly affect the development of the tourism industry recently. • Vietnamese people can be a strong advantage, but can also be a weak point in the tourism development in Vietnam. In fact, tourism is growing rapidly, but tourism experts are seriously lacking. Besides, the labour force, especially high quality labor force, has not met the development needs of the tourism sector, human resources training is sparse, only a few institutions training tourism level formal education, the rest are in the culture, college, vocational secondary, .. Human resources are not only limited in terms of qualifications but also in terms of skills, especially in foreign languages. Tourism businesses in particular and the tourism industry in general are highly in need of workers with foreign languages skills to better suit the tourism industry characteristics and the enterprises' needs. • Following the issue of people, the participation of local communities is crucial, but their perceptions and competence are uneven and limited at some points. This is due to the fact that their development vision is rather short-term and there is no long-term plan for livelihoods from the tourism sector. • Tourism products lack the characteristics as well as not properly exploit the valuable national resources. Besides, the facilities, means of support for interpretation and interpretation are mostly display, exhibition, etc. which can limit the experiences for domestic and international tourists. • Although the marine tourism and cultural products are quite diverse, the quality of these products could be improved and upgraded in many respects.
Opportunities • Preferential policy to promote tourism development, ex. master plans of tourism development for different periods. It is because the government of Vietnam has prioritized ecotourism in its strategy for tourism development to ensure both sustainability and economic benefits. • The rising involvement of the local community in tourism development. It helps educate the local community on the natural environment, raising their awareness and get them involved in conservation work • Increasing awareness of general population • Increasing number of visitors (both national and international) • Belongs to a dynamic tourism region • Easier to access due to development in infrastructure • Development of internet and new technology in tourism-related tools • Regional integration is opening up a great opportunity for the development of Vietnam's tourism industry. Vietnam is now a member of the ASEAN Economic Community and participates in the Trans-Pacific Partnership (TPP), if it takes advantage of it, tourism will play an important role in promoting the country's economic development, accelerating the integration process and	***Threats*** • The increasing travelling demands of different kinds of tourism all over the world. • Difficulties in preserving and maintaining the originality of ecotourism sites: the Substantial increasing number of tourists to the natural tourist sites may threaten the environment and vulnerable ecosystems. • Environment degradation • Loss of local authenticity due to globalization and urbanization • Competition with new destinations in SEA • The primary challenge of the tourism industry is the indigenous cultural values of the affected local community. Secondly, due to the development of multinational tourism corporations, many communities are displaced from the local tourism development process. For example, they cannot find jobs or cannot provide tourism products or services themselves to contribute to local tourism development. • The next significant challenge is the market. Although the establishment of MRA-TP is very crucial and has brought a number of benefits to the development of tourism of Southeast Asian countries. However, it is important

affirming Vietnam's position in the international arena. • In addition to regional integration, globalisation is also promoting the development of the tourism industry today. With the open policies of many countries in the world, the trend of tourism is changing and heading more strongly towards Southeast Asian market. • Apart from opportunities for development cooperation regionally and globally, Vietnam has attracted great attention and support from international organizations. This is understandably expected because Vietnam is known to be a destination of culture and heritage but with limited resources, especially financial resources. Therefore, there are a number of governmental and non-governmental organizations that have concerned about and offered both professional and financial support for Vietnam's tourism development in particular and the national development in general. • Vietnam's tourism sector has also implemented a number of policies to promote and enhance the development of the domestic tourism industry, most notably the Visa support policy. In 2017, Vietnam's tourism set a record to reach 12.9 million international visitors to Vietnam for the first time, growing nearly 30%. One of the reasons for this notable breakthrough growth is that the government has continued to exempt visas for five Western European countries and implemented electronic visa policies. It can be said that the visa exemption policy for five Western European countries is like the "magic wand" that helps Vietnam tourism bloom after a sharp decline in international visitors in 2014 and the first half of 2015. • The significant growth in domestic and international tourism investment also offers great opportunities. Major tourism corporations in the world are considering Vietnam as one of the countries with favourable investment conditions to develop high quality tourism products and services. • Another opportunity not to be missed is the advancement of science and technology today, especially the Industry 4.0 technology. This is a tremendous opportunity for Vietnam to improve tourism industry and bridge the gap with other countries in the world.	to look at the implications that it may bring to the indigenous people, especially for local labour force. • Another challenge worth mentioning is that irresponsible tourism in some key markets and lack of institutional control leads to unbalanced and unsustainable development in some parts of marine and culture tourism in Vietnam. • The competition of high quality human resources from other countries is also a remarkable challenge for the tourism industry in Vietnam as mentioned above, human resources in Vietnam are lacking and weak in skills. , level and attitude. In addition, excessive tourism activities can also put pressure on the environment, waste management, pollution and, in worse case, climate change. • The competitiveness of other regional and international destinations is also a challenge that needs to be addressed, particularly in Southeast Asian markets due to their cultural, natural and human resemblance.

Source: experts who participated in the focus groups organized under the TOURIST Erasmus + project

3.2.4. Quality standards for sustainable tourism

Thailand

The Global Sustainable Tourism Council (GSTC) announced Thailand's Sustainable Tourism Management Standard, published by Designated Areas for Sustainable Tourism Administration (DASTA), which is in line with the 'GSTC-Recognized Standard' status. DASTA's Thailand's Sustainable Tourism Management Standard has been created for managing tourism and aims at helping all types and sizes of tourism-related organizations to manage tourism systematically and sustainably. It is expected to enable those related organizations to achieve a performance that is higher than the basic level required by law. These standards, therefore, can be challenging for organizations that want to improve the efficiency of their operation, leading to 'Sustainable Tourism.' Achieving the GSTC-Recognized status means that GSTC technical experts and the GSTC Accreditation Panel have reviewed a sustainable tourism standard and deemed equivalent to the GSTC Criteria for sustainable tourism. Additionally, an organization that meets GSTC requirements must administer the standard. GSTC Recognition does not ensure that the certification process is reliable, only that the set of standards used to certify includes the minimum elements to ensure sustainability. The purpose of the GSTC programs is to reward genuine practitioners of sustainable tourism, which in turn builds confidence and credibility with consumers. "By gaining GSTC-Recognized status for Thailand's Sustainable Tourism Management Standard for Destinations, another step has been achieved in harmonizing national sustainability standards, set by DASTA, with global sustainability standards, set by GSTC," "This harmonization provides clarity for the management and market-facing communication of the application of these standards. That message includes the inclusion of the four pillars of sustainability: sustainable management, social/community, cultural, and environmental issues." "DASTA developed and has used Thailand's Sustainable Tourism Management Standard for training and verified tourism-related organizations for years. Now it became the first tourism-related standard in Thailand that has GSTC-Recognized status. However, it is not an achievement, but only another milestone proving that our work is accurate in accordance with the international standard", DASTA will continuously perform even harder to achieve GSTC-Accredited status eventually," To date, 10 destination standards, and 30 hotels and tour operators standards have achieved GSTC-Recognized status. The completion of these step-wise programs rewards standard owners for their commitment to sustainability while offering the market a proof that these standards adhere to international norms. The GSTC will continue to work with organizations around the world to provide GSTC Recognition of standards for sustainability in travel and tourism. GSTC Recognition does not ensure that a certification process is reliable, only that the set of standards used to certify are equivalent to the GSTC Criteria. GSTC-Recognized standard owners are encouraged to complete the Accreditation process, which relates to the quality and neutrality of their certification process. Achieving a GSTC-Accredited status affirms that their certification process follows the highest international standards while further distinguishing their standards and processes amongst other certification programs.

Vietnam

Vietnam still does not have standards for sustainable tourism policy, but tourism development activities are subject to the following principles:

- **Environment**: The best use of environmental resources plays a key role in the development of tourism, maintaining essential ecological processes, and helping to preserve natural and natural biodiversity.
- **Society and culture**: Respect the social and cultural honesty of local communities, preserve cultural heritage and traditional values that have been built and are alive and close. Contribute to intercultural understanding and sharing.
- **Economic**: Ensuring long-term economic viability, providing socio-economic benefits to all beneficiaries and being equitably distributed, including occupations and opportunities for stable returns and social services for local communities, and contribute to poverty reduction.

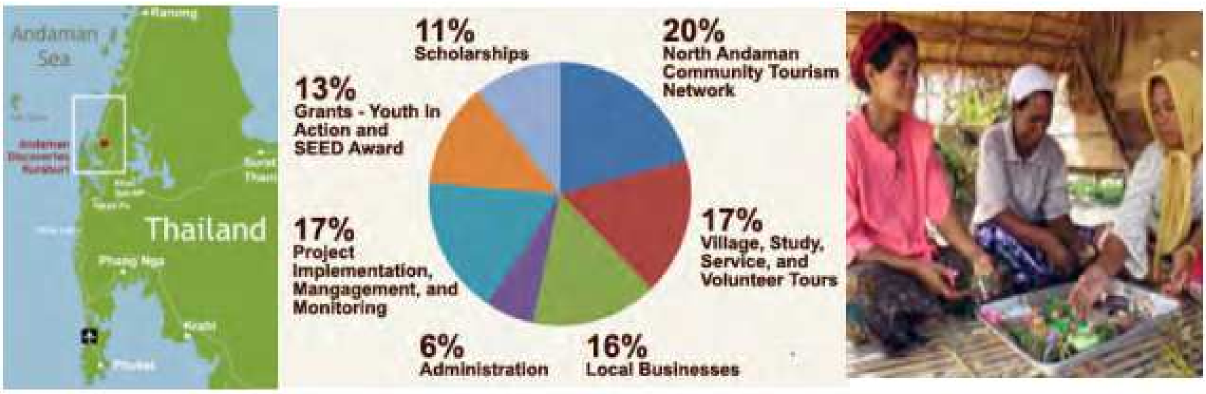
3.2.5. Good practices in sustainable tourism

In Thailand, the Ministry of Tourism and Sports reported to the Cabinet that the strategic plan has adopted a vision that, by 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, and inclusive tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people. Sustainable tourism growth can be achieved through the participation of local communities, as well as the public and private sectors. Emphasis must be placed on maintaining safety and preserving significant natural and cultural attractions. The natural environment must be protected, as well. At the same meeting, the Cabinet also approved the signing of the Memorandum of Cooperation between the Governments of the Member States of the Association of Southeast Asian Nations and the Governments of the People's Republic of China, Japan, and the Republic of Korea on Strengthening Tourism Cooperation. Minister of Tourism and Sports Kobkarn Wattanavrangkul was assigned to represent Thailand in signing this memorandum. Meanwhile, the Tourism Authority of Thailand (TAT) reported that the Thai government's national tourism development plan for 2016-2017 places greater emphasis on community-based tourism. Minister Kobkarn said that in the national tourism development plan; Thailand aims to disperse income to local communities nationwide. It also plans to build a better quality of life for the local people, strengthen the communities, and promote the preservation of Thai culture and traditions. All these will lead to the conservation of the country's natural resources and the sustainability of the country's tourism industry as a whole. In a tourism forum held in Bangkok on 16 January 2016, TAT Governor Yuthasak Supasorn stated that community-based tourism is a global trend. Today, travelers are in search for tourism products and services that take into account the environmental, economic, and social sustainability. This is a new aspect of tourism that TAT will be gearing toward for future tourism development of Thailand. A speaker at the forum, the Director of Borneo Adventure, Sarawak, Malaysia, Mr. Robert Basiuk, lauded Thailand as a model destination that adopts strategies and practices toward sustainable tourism. He said that in order to achieve sustainability from the development and promotion of community-based tourism, which helps disperse income to all parts of society, the initiative would require cooperation from all involved, especially the private sector.

Example Good practices:

A. Case Andaman Discoveries Form Relief to Self-Reliance

Andaman Discoveries, formerly The North Andaman Tsunami Relief, is a Thai social enterprise serving local communities. After the devastating tsunami in 2004, Andaman Discoveries, together with a network of supporters helped villages of southern Thailand implement over 120 projects in a dozen villages. All projects have focused on creating realistic economic opportunities for local communities. Andaman Discoveries has placed long-term social, economic, and environmental sustainability as its top priority in all of its projects



Conservation

- Protecting local plant species
    - Restored orchid population with The Orchid Conservation project and re-established water lily into original habitat. § Collaborated with Mangrove Action project and International Union for Conservation of Nature to create groups to participate in Youth in Action for the Next Generation.
- Promoting conservation via education programs
    - Funded Youth Action Conservation Project to focus on "Local action, Global change" to educate youth on the environment, human interaction with environment, and local conservation efforts. § Educated local youths on restoring mangrove forests and measuring biodiversity and other physical changes over time with transects on plots. § Hosted Reef Education Program in collaboration with Reef Check International to minimize the community based tourism's effects on reef
- Assisting local community conservation efforts

- Established no-fishing zone together with Tung Dap community to to prevent overfishing as numbers of tourists increase.

Community

- Empower local communities and prepare communities for tourism growth.
    - Offer lessons in English and on income generating activities (handicrafts and cards made from recycled paper).
    - Enroll adults in hospitality and travel planning courses.
    - Initiate tour guide and First-aid training to local communities.
- Assist local community construction projects
    - Partnered with Birmingham University International Volunteer Community to build path to Samakeetham Buddhist Temple in Tung Rak village.
    - Funded construction of Ban Talae Nok village community center which the village uses as library, tourism office, education space, souvenir shop for local products etc.
- Providing assistance to local communities
    - Donated books, gym equipment, and traditional Thai instruments to village schools (students performed for Thai Princess in 2008).
    - Recruited volunteers to offer first-aid training and education sessions on dental care, hygiene, and family planning in Ban Talae Nok.
    - Provided relief to local Moken community when natural disasters prevented locals to fish and harvest.

Commerce

- Offering community based tourism programs
    - Helped Moken community develop snorkel and Koh Surin tours.
    - Developed in-depth tours of island and village communities. (Ban Talae Nok, Ta Pae Yoi, Tung Dap, Tung Nang, Damn, Ban Lion)
    - Created customized tours concentrating on benefitting local communities in the areas of social welfare, community development, and conservation.

The projects that Andaman Discoveries implemented have provided genuine benefits for the local communities. Through its efforts, the organization has also helped volunteers to directly work with local population to promote education, conservation, health, and community development. Through the years, Andaman Discoveries received multiple awards from Thailand and internationally for its constant efforts in community development. Some of the awards include: Wild Asia's Responsible Award ('07- '09 & '10); Travel + Leisure Global Vision Award ('08). BBC World Challenge Finalist ('09) and many more[21].

[21] Reference: http://www.northandamantsunamirelief.com/The North Andaman Tsunami Relief http://www.andamandiscoveries.com/Andaman Discoveries http://www.ecotourism.org/news/north-andaman-tsunami-relief-natr International Ecotourism Society Photograph courtesy of Andaman Discoveries official website

Co-funded by the Erasmus+ Programme of the European Union

B. Case Koh Lon community, Phuket 2015-2017: by Dr.Aphirom Promchanya from Prince of Songkla university, Phuket campus recieved the promotion CBT under project Village to the world of TAT has surveyed the Island, discussed with the villagers, and recommended the Ecotourism management & development for Tourism Sustainability and Creativity.

In this study, the researcher has concluded 9 Land and Marine Tourist Attractive Points of Koh Lon Community as follows:

1. Community based Eco Tourism
2. Marine Community based Eco Tourism
3. Natural Resources Community based Eco Tourism
4. Preservative & Volunteer Tourist Programs of Community based Eco Tourism Marine and Homestay Tourist Program of Community based Eco Tourism
5. Local Festival Tourist Programs of Community based Eco Tourism
6. Cultural Tourist Programs of Community based Eco Tourism
7. Traditional Tourist Programs of Community based Eco Tourism Thai Fusion Food Tourist Program of Community based Eco Tourism

In addition, Koh Lon Community has developed the Product Models and Souvenirs by Product Modernization and Valuation with Local raw materials identities for example Batik Painting, using Octopus Art called Woiwai Kid Art, Doodle Woiwai, Woiwai of indian. Tie Dye Cloth, Batik Scarf, Batik Pillow Cover, Batik Mobile Case, Batik Octopus Notebook Cover and Virgin Cold Pressed Coconut Oil. From the above, the researcher has emphasized on the integration and knowledgement of Koh Lon Community Efficiency, and that will encourage Community based Ecotourism Creativity & Participation including Human Resources Developing for effective Hospitality and Tourism, Experiencing Tourists and Visitors in Community Identity, which coordinate to Thai Government Policy for "Future Sustainable and Prosperous Tourism Driving" Koh Lon Community should take account on the affects occurred in order to protect the future problems by following recognition:

1. To reinforce knowledge and skills for Koh Lon Community to improve tourism management, marketing, risk management, and community products for standardization. Creating knowledge procedures for community to apply in the future by training and actual operation, about community base tourism services and product management, as well as creating selling point of Ecotourism of Koh Lon.

2. To develop and upgrade the community products including developing the Characteristic of products used local raw material for the production, presenting local community knowledge. Pushing Eco Tourism to community in order to make their own identity and their own advantages of Koh Lon, even Thai Fusion Food and others.

3. To connect community producers with consumers relating to Value Chain to the market, recommend the Ecotourism products development to the community for creating product value by organizing Ecotourism Programs, presented to the government and private agency such as Over

Night and Day Trip Program, Volunteer Activity, Preservative Activity, Environment Activity as the above mention.

4. To cooperate Community with related department to develop Eco Tourism of Koh Lon, one of Andaman provinces.

4. Gaps and recommendations

4.1. Europe

Main gaps

A **more successful and sustainable tourism** might imply to pay more attention to the following aspects:

- Subsidies are over-represented in the financial structure of the tourism industry in Austria and also in the regions.
- International investors are only seen as minor sources for financing, as efforts and guarantees that are requested are high.
- Challenges are definitely connected with the current level of interests which are very low. If in the next 5-10 years interests increase again, then this will cause big problems and challenges when it comes to the repayments of the loans
- Through international pricing pressures, it will become more and more difficult to generate marginal returns and own capital which might increase difficulties when it comes to the request for loans.
- Steering of visitor flows from traditionally popular attractions to new locations, and scheduling of visitor groups to avoid crowds and congestion in the most visited attractions.

A successful sustainable tourism in the future

In order to **promote a more Sustainable Tourism** it is:

- Important to be developed foresight activities. Why? To anticipate tourism development, cooperation both between businesses and other organisations and public and private sector, communication for visitors and residents.
- Urgent to deepen cooperation among stakeholders.

Possible paths for tackling current and past efforts in Sustainable Tourism and Innovative financial management strategies

- Collaboration and using available resources effectively and efficiently is an important aspect which needs to be increased in the future in order to generate further growth in the tourism industry. This change in thinking needs to be created, but its implementation will take some time.
- Further, it is essential to create a common branding for external promotion and to establish the tourism industry as a quality growth industry in the future.

Measures to be implemented in the future **to benefit long-term** from a sustainable tourism strategy

- Lobbying and innovative thinking.
- Support and a clearly communicated strategy coming from the ministry of tourism and sustainability would be very helpful.
- It is essential to provide the infrastructure on a national level to implement sustainable concepts such as e-mobility in tourism.
- There should be subsidies for sustainable tourism concepts.
- The tax system needs to be modified in order to strengthen the competition in the industry.

The actors which should be involved in the development of a sustainable tourism context given their capacity of pressuring for a Sustainable Tourism development (the most important TARGET GROUPS): tourists, primary, secondary and higher education.

4.2. Asia

4.2.1. Thailand

Main gaps

A **more successful and sustainable tourism** might imply to pay more attention to the following aspects:

- Investment in infrastructure, especially public transportation and international connectivity
- Cooperation and communication between the different national and local government agencies who are tasked with regulation and enforcement of policies related to tourism
- Integration of training and education initiatives to ensure that the private and public sector actors are all on the same page

- The use of HEIs such as Payap to serve as impartial facilitators thus avoiding the conflicts of interest and agendas of the different actors, both state and private, involved in the tourism industry.
- There are some particular aspects in make tourism more sucessful and sustainable in Thailand for example: remains prosperous and maintains its original culture. Then, tourists will continue to demand trips and be attracted to Thailand. And ecological point of view, it must be protected in order for the natural beauty to remain and lastly, Thailand must ensure that it has an effective political framework in tourist needs.
- System, law enforcement, culture

A successful sustainable tourism in the future

In order to **promote a more Sustainable Tourism** it is:

- Important to be developed local knowledge and understanding of sustainable tourism concept, strict rules and regulations relating to promoting the 3 bottom-line
- Urgent to:
  - invest in infrastructure, especially public transportation and international connectivity
  - implement regulatory framework aiming to protect the environment and venerable communities
  - increase human resource capacities at all levels

Possible paths for tackling current and past efforts in Sustainable Tourism and Innovative financial management strategies

- Cooperation and communication between the different national and local government agencies who are tasked with regulation and enforcement of policies related to tourism
- Integration of training and education initiatives to ensure that the private and public sector actors are all on the same page especially on the subject of sustainability, environmental responsibility and responsible tourism
- The use of HEIs such as Payap to serve as impartial facilitators thus avoiding the conflicts of interest and agendas of the different actors, both state and private, involved in the tourism industry
- The formation of a Tourism Council of Chiang Mai that brings together the various stakeholders, both public and private, to cooperate on the development of sustainability strategies and implementation
- Educational program on sustainable tourism to be delivered to local community leaders.
- More efficient & strict enforcement procedures by local authorities

The actors which should be involved in the development of a sustainable tourism context given their capacity of pressuring for a Sustainable Tourism development (the most important TARGET GROUPS):

- National and regional government agencies.
- Tourism Associations.
- Military commands (related to land holdings by the different military branches).
- Higher education institutions.
- The highest spending tourists groups (Chinese, Middle-east, European, American).

4.2.2. Vietnam

Main gaps

A **more successful and sustainable tourism** might imply to pay more attention to the following aspects:

- Master planning for developing typical products or images for each region
- Improve the initiative role of local governments in tourism
- Cooperation between local government and businesses, and community
- Mechanism to financially and politically support local businesses.
- Broaden a variety of tourist attractions, tourism facilities.
- Promote destination marketing. Tourism participants have to know about what kind of things attract tourists because local interest differs from one of tourists.
- Change in management policy.
- Create specialism/uniqueness in tourism products.
- Create networking between different types of tourism businesses, namely tour operators, travel agencies, hotels, restaurants, etc.
- Focus on human resources training
- Strictly manage different kinds of means of transportation.
- More open policies (e.g., visa).
- Lack of strategies and coordination to build specific products for the city's tourism.
- Lack of consistency in terms of utilization and conservation of tourism resources.

Among the most relevant GAPs identified in the Southeast Asian countries (i.e., Thailand and Vietnam) tables 11, 12 and 13 underlines the ones corresponding to economic, socio-cultural and environmental areas respectively.

Table 11. GAPs in the economic area of Sustainable Tourism

Level	THAILAND	VIETNAM
Strategic & development	• Thailand has laid out its long-term economic goals in its 20-Year National Strategy (2017-2036) for attaining developed country status through broad reforms. The reforms address economic stability, human capital, equal economic opportunities, environmental sustainability, competitiveness, and effective government bureaucracies. The reforms include the implementation of large multi-year public infrastructure projects related to dual tracking of railways, regulatory reforms aimed at improving ease of doing business, setting up the State Enterprise Policy Committee to improve state-owned enterprise governance, the transfer of supervisory oversight of specialized financial institutions to the Bank of Thailand.	• Low prioritization for tourism development • Policy shortcomings on visa application and immigration • lack of regulations / insufficient enforcement of regulations • Uncertainty regarding business environment, IP, etc. • Low connexion between development stage and promotion of ST activities • Lack of standards of ST • Availability of dynamic ST indicators
Competence & knowledge	• Main Issue - Mutual Recognition Arrangement on Tourism Professionals (MRA on TP) • Responsible Authority - Ministry of Tourism and Sports (MoTs) • According to the ASEAN Common Competency Standard on Tourism Professionals (ACCSTP) has been developed in the purpose of being as a tool for standardization development the tourism industry skilled labours. Also, the signing contract on MRA on TPs has been approved by Thai Government and signage was done then the Ministry of Tourism and Sports (MoTs) is the key player to provide the educating and training the tourism industry workers in Thailand to achieve the qualified competency in order to work in any workplaces by mutually agreed in ASEAN countries (MRA on TP). • However, the progress is decelerated due to the transferring of empowerment from the previous authority was changed to the new department which it relevantly to learn a new knowledge and its implementing, whether the MoTs seems to be going back on track but it still took times on route to get the adequate qualified manpower and create a stabilize process this in a long-run.	• Unskilled human resources, low customer orientation, touristic marketing … • Low or no objective control of evolution, achievements, etc. • Lack of international openness
Infrastructure	• Slow capital budget execution (Transportation Action Plan) • Lack of service infrastructure	• Connectivity, IT limitations (e.g., mobile coverage) • Low infrastructure system (transportation-air, ground and port infrastructure, electricity, waste treatment) • Lack of service infrastructure
Natural and cultural resources	• Waste and water management • Measures regarding changes in the energy mix to renewable promotion	• Waste and water management • Measures regarding changes in the energy mix → renewable promotion

Table 12. GAPs in the socio-cultural area of ST

Level	THAILAND	VIETNAM
Strategic & development	Human capacity and standard of living of the Thai people are below the target and are inconsistent with a knowledge-based economic and social development direction. This matter occurs as a result of some major problems, such as: low quality in education and learning; delayed development in pre-school children due to lack of knowledge and time of their families; a shortfall of school age children's intellect because of the low quality of education; and a lack of skill and ability to adapt theoretical knowledge into practice, eventually resulting in low labor productivity. Another problematic issue regarding human capital development in Thailand is environmental and behavioral risk. Thai people are deemed to be more likely to be affected by non-communicable diseases and premature death as a result of inappropriate consumption behavior and a lack of adequate physical activity. Determinants of health are also considered to other environmental health risks: for example, those who have low levels of education are subject to lesser awareness about health and the alternatives for a healthy lifestyle, such as: food safety risks, air pollution exposure, and road accidents.	• Insufficient enforcement of regulations • Lack of implementation actions
Competence & knowledge	The nation's working age population reached its peak in 2014 and will be on a path of steady decline thereafter, possibly leading to severe labor shortage problems, which can be further intensified if the existing seemingly low labor productivity problem is not adequately tackled, due to a number of factors, including low quality workforce, delayed technological development, and administrative problems. Such challenges can pose some limitations to the nation's competitiveness, development, economic growth as well as income generation and well-being improvement of the Thai people. Furthermore, besides quantitative challenges, the qualitative aspect of the Thai people is also considered to be a challenge that needs to be tackled. Problems, despite varying depending on the age groups concerned, are nonetheless interconnected, starting from early childhood. Inadequate early childhood development can very likely lead to poorly performing school age children and a mismatch of skills development for the labor market. The number of elderly people living alone who have health-related problems is expected to be on the rise.	
Infrastructure	• Slow capital budget execution • Public transportation	• Lack of connectivity • Insufficient public transportation
Natural and cultural resources	• Adaptation of cultural resources from local to tourists. • The influences of foreign cultures, being absorbed into the Thai society more easily in the digital era, can negatively impact social norms, attitudes and the behavior of some Thai people, especially those who are unable to screen out inadequate cultures.	• Adaptation of cultural resources to tourists´ demand • Commercialization of tourism products, more attention in „benefits“ than in „efficiency“ Downgrading of natural and cultural resources

Table 13. GAPs in the environmental area of ST

Level	THAILAND	VIETNAM
Strategic & development	• Probably the most critical issues for Thailand. Over several decades, natural resources have been utilized tremendously for development. Consequently, natural resources have been constantly depleted whilst the natural environment has deteriorated in quality. As a result, conflicts over the utilization of natural resource between the government and different groups of people have tended to increase. In addition, the management of natural resources and the environment remains centralized, which has no linkage with the local level. All these factors have contributed to the existing state of natural resources. Forest areas are decreasing. Soil becomes unfertile. Biodiversity is threatened. Coastal ecosystems are destroyed. Water resources cannot meet consumption demand. Environmental problems escalate simultaneously with the growth of the economy and urbanization. The management of Municipal Solid Waste (MSW) is still inefficient, leaving unmanaged solid waste accumulated over.	
Competence & knowledge	• Thailand's current economic and social structure remains weak, whereas its overall management still lacks efficiency and transparency. As a result, Thailand is facing greater pressure and risk under intensified globalization, moving towards a world with no boundaries – free mobility of manpower, goods and services, investment, knowledge, as well as data and information. Consequently, global competition has become more severe; economic bloc formation has been prevalent; R&D in ST&I effort has been stimulated to increase productivity.	
Infrastructure	• Public transportation	
Natural and cultural resources	• Improvement of the biological and cultural diversity, Make more efficient the resources use reduce waste and control excessive consumption of resources (water) Plastic waste and sewage. • If these reforms fail to be achieved during the next 4-5 years, Thailand will lose its competitiveness. The average income per capita will not rise. The overall quality of life, on average, will continue to be low. Inequality will be higher. Natural resources will further deteriorate. In the end, development will not be sustainable in the long term. The country will not be able to become developed by 2030, as is targeted in the 20-year National Strategy.	

A successful sustainable tourism in the future

In order to **promote a more Sustainable Tourism** it is:

- Important to:
    - Preserve and maintain vulnerable cultural and natural tourism resources.
    - Share the benefits among all stakeholders in the tourism development including poor people (they could participate to and share the benefits of tourism development).
    - Protect the environment (e.g., waste and air management).
    - Prevent "rip off" situation.
    - Raise awareness among local citizens.
    - Diversify tourism products and services.
    - Respect others' culture (international tourists).
    - Develop common regulations for both tourists and local people.
    - Avoid feeling discriminated
    - Simplify the documentary schedules to encourage investment from international organizations and foreign countries
    - Professionalize tourism promotion
    - Avoid unfair price competition
    - Learn from the Thai experience "Smile and say thank you". To raise the awareness among citizens, to create a friendly image of HCMC inhabitants role of education. It is vital to establish a "tourism culture".
    - Build a city worth living for local people. When the inhabitants feel happy with their city, they can share this positive feeling with tourists.
    - Create a stable, advantageous environment for investments and business as tourism development depends on the economic development
    - Consider support from other sectors: security, public transportation, food safety… "not only tourism enterprises, but we need the contribution of the whole society"
    - Respect culture of others (international tourists). To develop common regulations for both tourists and local people, to avoid the feeling of discrimination
    - Create good products/service and have specified character of each region;
    - Research markets more deeply and thoroughly, especially in the context of the current situation because Vietnam is the destination of many new markets but some markets are not suitable with Vietnam. This will bring some negative impacts on the sustainable development of Vietnam tourism. Therefore, it is necessary to study and select the tourism markets carefully and more effectively, so the policies and activities of advertising and destination marketing of Vietnam can really bring positive results.
    - Promote and improve human resources quality and skills to meet the needs of regional and international markets;
    - Increase state budget for tourism development, especially sustainable tourism.

    - Enhance public-private partnership is always a very important issue to promote the development of the sector.
    - Upgrade the infrastructure for tourism and it can be done if the fourth thing should be taken care of and implemented first;
    - Establish centres for capacity building for sustainable tourism development and innovative financial management strategies to increase the positive impact of Vietnam tourism
- Urgent to prioritize and foster:
    - public-private partnership
    - human resources training
    - destination products
    - marketing, market research
    - the relevance of tourism within the national budget
    - infrastructure
    - the establishment of capacity building centers for sustainable tourism development and innovative financial management strategies

The actors which should be involved in the development of a sustainable tourism context given their capacity of pressuring for a Sustainable Tourism development (the most important TARGET GROUPS):

- All stakeholders in tourism are important target groups, namely the government, local community, tourism businesses and tourists.
- The most important target that can influence sustainable tourism development is the concrete coordination between all stakeholders from inside (government, local people, enterprises in the country) and outside (international enterprises and tourists).

5. Conclusions

Nowadays it is clear that tourism have to face different challenges in order to continue generating growth, creating jobs and enabling national development and regional integration. All this depends on its facility to identify and adapt to the main trends as this has an impact on the short, medium and long run development of the sector. Moreover, sustainability is an additional aspect that must be taken into consideration especially by countries like Thailand and Vietnam as they are expected to be in the top 10 of fastest growing destinations for leisure travel spending by 2026. In this sense, the World Economic Forum emphasize several trends in the travel and tourism industry which are linked to sustainable tourism goals:

- The continuous changes experienced by tourists, seeking for more personalized experiences, must be tackled from two angles: (a) travelling was a luxury good in the fifties, but the reduction of travel barriers and of costs, together with the increase of income available and the rise of the middle class in many emerging markets and changing attitudes of people towards travel, have enabled the industry to flourish; (b) the attitude of tourists towards tourism might be a boundary for tourism practitioners as whether they could look for sustainable tourism given the high awareness or exactly the opposite. What is more, is that new consumers like the millennials, more tech-savvy and connected and foreseen to become the core consumers in the future, as well as older baby boomers are looking for experiences, but very different ones.
- Despite the hanger for new and different experiences, there is low tolerance for barriers to global mobility. Still, obsolete/overused infrastructure and high bureaucracy make the system too mature for the expectations of tourists nowadays. There is no doubt that infrastructure is becoming a bottleneck, especially in destinations experiencing overtourism and excessive population density (e.g., Thailand, Vietnam, but also big cities like Barcelona). IT should be better employed in overcoming these type of barriers.
- Another challenge to be tackled is the instability, but not just the economic but also the geopolitical one. To this end, it is essential rethinking the policy framework and innovate the way people move across the world. The top 10 fastest growing destinations for leisure travel spending are all emerging markets where instability is still a frequent issue.
- Under the forth revolution, many shifts were undertaken in the way people experience, consume and share information. Hence, tourism industry has to adapt rapidly to these shifts if competitiveness is to be maintained and improved especially via high-tech.
- For improving travel and tourism competitiveness, human resources are fundamental. Given the potential for job creation of the tourism industry (one out of ten jobs), it is not all about creating jobs, but also about the sustainability of the jobs created. For that, talent attraction should be enhanced as well as the adjustment of university and training programmes to the market needs and technological advancements. Here communication and close collaboration between the private and public sectors is a key factor.

Sustainability might be the main challenge as it concerns all other challenges. As already depicted within this report, a spectacular growth was experienced in the travel and tourism industry since the fifties. While developed economies took advantage earlier from the positive economic effects of tourism, emerging economies are doing so in the last decades. Despite the existence of positive impact on the economic growth of tourist destinations, many negative impact are rising on their environment and local communities. For ensuring travel and tourism industry´s long-term sustainability, these negative impacts must be mitigated and the economic impact should be controlled aiming at prolonging the positive effects.

From the comparison carried out under the umbrella of TOURIST Erasmus+ project, several aspects need to be addressed in the three areas included in sustainability, i.e., economic, socio-cultural and environmental areas.

In the **economic** area, the following gaps of sustainable tourism were determined:

(1) From a strategic and development perspective it is clear that:
   a. All five countries, European and Asian, have deficiency regarding strategic planning even though at different level, but the implementation seems not to be easy.
   b. It is mainly in the Asian countries were tourism is not being prioritize as is should be despite the contribution of this industry to the economic growth. The connexion between their development stage and the promotion of sustainable tourism activities is still not suitable enough.
   c. Uncertainty of business environment, intellectual property, low or no investment in R&D and innovation is not adequate especially in Asian countries, but it can be improved significantly in European countries as well given the evolution of the global economy in the last decade.
   d. Design, implementation and enforcement of legislation on specific aspects of sustainable tourism and connected sectors is also needed especially in Vietnam.
   e. For a proper evaluation and monitoring of the evolution towards a more sustainable tourism, availability of sustainable indicators, preferably dynamic ones, is needed in a higher or lower level depending on the country. Indicators already exist in the majority of developed economies, but they need to be adapted to the specific context, while in Asian countries this seems to be an important drawback.
   f. Quality standards are to be designed, implemented and improved at different levels.
   g. Close collaboration between all stakeholders involved in the travel and tourism industry with a central role of public administration as the core of the communication channel of the triple helix (society-government-industry).

(2) Regarding competence and knowledge gaps:
   a. Aligning education and training to the needs of the industry is valid in all five countries, but again at different level.
   b. Skills in advertising, marketing and customer orientation are needed especially in Vietnam, but improvements are required in the other four countries as well.

c. Knowledge of monitoring and evaluation of sustainable tourism is enquired in Thailand and Vietnam and progress and updates are mentioned for the European countries.
d. Better understanding of the tourism impact is needed in all five countries, while more knowledge regarding the effects of international openness is requested in Vietnam.

(3) In what refers to the infrastructure:
a. Vietnam and Thailand are facing deep gaps in this aspect. On one hand due to the slow capital budget execution (Thailand), and on the other hand given the lack of service infrastructure and low quality of the infrastructure system. In Vietnam connectivity and IT limitation are also underlined within the different focus groups.
b. European countries do not face so many problems in regards to connectivity, IT accessibility and funds for developing infrastructure, but they do have issues regarding the age of accommodation infrastructure and insufficient use of the possibilities offered by new technologies.

(4) Natural and cultural resources:
a. Waste and water management are the most preoccupying aspects especially in Thailand and Vietnam for the economic perspective, but also the measures to be designed and implemented aiming at reducing dependence on fossil fuels and changes in the energy mix via renewable sources promotion and funding.
b. The three European countries are a lot better positioned in this sense, but innovation and updates are always needed. Additionally, the European system already incorporated different environmental regulation, but not all tourism companies are fulfilling with it. This might be an issue in terms of competition (i.e., unfair competition).

The gaps identified in the **socio-economic area** of sustainable tourism could be summarized along the following lines:

(1) From a strategic and development perspective:
a. Insufficient enforcement of regulation with clear impact on human capacity and living standards is underlined in both Vietnam and Thailand.
b. Low quality education and its consequent effects on income and job sustainability perceived and experienced by the society given the low labour productivity, among others. This might be applicable to all five countries, but with higher intensify in Thailand and Vietnam.
c. Raise awareness regarding the determinants of health and healthy lifestyle under the climate change.

(2) Regarding competence and knowledge gaps:
a. Given the demographic issues especially in developed countries (in our case mainly in Spain), but also in the Asian ones, sever labour shortage problems are on the table. To avoid this, society have to continuously improve skills and knowledge and, thus, increasing labour productivity.

b. Technological readiness and IT usage by all is also a must, but low knowledge in this regards is given in all five countries at least among elderly population.

(3) In what refers to the infrastructure:
   a. Low connectivity, insufficient public transportation and slow budget execution are the main gaps identified in Thailand and Vietanm.
   b. Congestion and overuse of infrastructure is also an issue for the society locate in the three European countries analyzed.

(4) Natural and cultural resources:
   a. Adaptation of cultural resources to tourist demand is requested not just in Thailand and Vietnam, but also in Europe, especially in Spain.
   b. High preference for economic benefits over conservation of natural and cultural resources and efficiency.
   c. Modification of local/national culture along with tourists culture and preferences is specified mainly in Thailand.

Regarding the **environmental area** of sustainable tourism, the main gaps based on the analysis carried out within TOURIST project are summarized as following lines:

(1) From a strategic and development perspective:
   a. Better planning of the use of natural resources is requested in all five countries.
   b. More control is requested over: urbanization and soil use, water use and availability, waste production and waste management, costal ecosystem and forests planning and management, among others. This is not an issue exclusively for Thailand and Vietnam, but also for Austria, Finland and Spain where updates and innovation are needed.

(2) Regarding competence and knowledge gaps:
   a. Overall management skills lacks efficiency and transparency and emerging economies are facing greater pressure and risks under intensified globalization. Their development is still based clearly on basic requirements, which means a higher exploitation of natural resources and still low efficiency and knowledge-based society. Therefore, higher risk of negative environmental impacts is expected to place in emerging economies.

(3) In what refers to the infrastructure:
   a. Low use of IT and the options facilitated by high-tech especially in emerging countries, among others, due to lower availability of financial funds for research, development and innovation in less contaminating infrastructures.

(4) Natural and cultural resources:
   a. Improvement needed in biological and cultural diversity mainly in Thailand and Vietnam, but not only.
   b. Increase efficiency in the use of resources, reduce waste and control excessive consumption of resources (see excessive water use in tourism and its consequences on water availability and water inequality for residents and other industries) are also requested in all five countries; more intensively in Thailand and Vietnam.

Aiming to overcome these gaps, creating an environment able to facilitate private sector investment and financing sustainable tourism and sustainable development are fundamental. Thus, policy makers are key stakeholders in facilitating the way towards a more sustainable tourism as they can strengthen engagement and commitment with sustainable tourism from the private sector, financiers, investors, but also society as a whole (residents and tourists).

This could be feasible by formulating supportive policy frameworks and providing smart subsidies and incentives that are conducive to competitiveness, inclusiveness and sustainability (UNWTO and UNDP, 2017). Some possible ways towards that include facilitating access to knowledge and capacity especially for SMEs and increase awareness on sustainability and its role in the medium and long run. This would enhance investment in greener and more sustainable businesses and innovation. Moreover, expand local production in the tourism supply chain, reinforce locals.

Apart from designing and implementing an adequate policy framework, probably the most complicated part remains financing sustainable tourism projects. Despite the growing number of multilateral development banks and their investment in sustainable tourism or technical assistance, there is still a significant lack and even diminishing availability of financing for sustainable tourism especially in emerging countries. Coordination among financial sources and strategies could boost efficiency, quality and longevity of positive socio-economic and environmental impacts while mitigating negative ones (UNWTO and UNDP, 2017). Thus, include innovative financing mechanism in resource mobilization efforts for sustainable tourism is essential.

Summing up, the main recommendations are presented in the table below. Nevertheless, extensive analysis might be carried out for more details recommendations.

Table 14. Main recommendations for policymakers, practitioners and stakeholders in general

Policymakers	Practitioners	All stakeholders
Design and adapt national/regional/local sustainable strategies with tourism in the spotlight	Share experiences, good practices and lessons learned	Support the efforts of all tourism stakeholders
Set up more inclusive tourism policies	Continue investing in people, technologies and ICT	Build closer dialogue
Design, implement and update tourism strategies to underpin skills and knowledge and strengthen tourism value chains for enhanced local economic impact	Increase local purchasing of goods and services along the tourism value chain	Strengthen public-private and multi-stakeholder partnerships
Assess and monitor tourism's sustainability (e.g., ST indicators)	Measure and monitor the impact	Ensure effective cooperation among all major stakeholders
Enhance statistical capacity-building	Promote high-quality education and vocational training	
Build capacity and create incentives for private sector research and development and innovation	Raise awareness of the business opportunities created by ST	

Source: based on the research carried out under TOURIST needs analysis methodology and OECD (2018).

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