



Tourism for Sustainable Development in Least Developed Countries

Leveraging Resources for Sustainable Tourism with the Enhanced Integrated Framework



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



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**Tourism for Sustainable Development in the Least Developed Countries –
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Contents

Acronyms	5
Acknowledgements	6
Foreword	7
Executive Summary	8
1. Tourism: A key export sector for LDC development	10
2. How to strengthen tourism in LDCs: New insights	14
Tourism in Diagnostic Trade Integration Studies	15
Pillar 1: Tourism Policy and Governance	17
Pillar 2: Economic Performance, Investment and Competitiveness	17
Pillar 3: Employment, Decent Work and Human Capital	17
Pillar 4: Poverty Reduction and Social Inclusion	17
Pillar 5: Sustainability of the Natural and Cultural Environment	17
Tourism or sustainable tourism for LDCs?	17
3. Bringing tourism and trade stakeholders together	19
DTIS in support of multi-stakeholder dialogue on tourism	20
DTIS development and country ownership	20
4. Leveraging resources for tourism	21
Modest international assistance to tourism	21
Identifying bottlenecks	24
Institutional capacity to implement tourism-related actions	24
From trade diagnostics to strengthening tourism	25
5. Conclusions: From planning to action	27

Annexes

1: List of DTIS with a section dedicated to tourism	28
2: List of action matrices with a section dedicated to tourism	29
3: Tourism Tier 2 projects	31
4: Template country analysis of tourism references in DTIS	32
5: Template country analysis of tourism references in action matrices	34
6: Questionnaire responses	36
7: EIF countries' trade and tourism portfolios	37

Boxes, Tables and Figures

Box 1: Key dimensions and themes of sustainable tourism	12
Box 2: Tourism references found in Sudan's DTIS Update 2014	13
Box 3: DTIS Preparation	18
Box 4: Defining and measuring Aid for Trade	21
Box 5: Aid for Trade for least developed countries – lessons learned	25
Box 6: Tourism leveraging in Vanuatu	26
Table 1: EIF regions and countries with tourism in their DTIS	13
Table 2: ODA Aid for Trade disbursements by income group (\$ million)	22
Table 3: Aid for Trade tourism disbursements to main recipients, average between 2010–2015 (\$ million)	23
Table 4: Major ODA donors for tourism in 2015	24
Figure 1: Number of DTIS references on how tourism can contribute to development	15
Figure 2: Number of DTIS tourism references grouped per tourism development sub-pillar	15
Figure 3: Action matrices tourism references grouped by tourism development pillars and sub-pillars	17
Figure 4: Challenges for tourism development in the LDCs	19
Figure 5: Total ODA Aid for Trade disbursement shares by sector, 2010–2015	22
Figure 6: Main donors of tourism-related Aid for Trade ODA disbursements, average per year between 2010–2015	23

Acronyms

Unless otherwise specified, all references to dollars (\$) are to United States dollars.

CRS	OECD Creditor Reporting System
DAC	OECD Development Assistance Committee
DTIS	Diagnostic Trade Integration Study
EIF	Enhanced Integrated Framework
GDP	Gross domestic product
ITC	International Trade Centre
LDC	Least developed country
LIC	Low-income country
NIA	EIF National Implementation Arrangement
NTA	National tourism authority
NIU	EIF national implementation unit
ODA	Official development assistance
SDG	Sustainable Development Goal
UN	United Nations
UNWTO	World Tourism Organization
WTO	World Trade Organization

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Foreword

This joint report on “Tourism for Sustainable Development in Least Developed Countries” is published as we celebrate the International Year of Sustainable Tourism for Development in 2017. This year is also the first year in which the Sustainable Development Goals (SDGs) are effective.

The United Nations has designated 2017 as the International Year of Sustainable Tourism for Development recognizing the important contribution of tourism in advancing the SDGs. Tourism contributes, directly or indirectly, to all of the 17 Goals and is specifically included in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Tourism indeed makes a key contribution to many of today’s global challenges, including economic growth, poverty alleviation, job creation, women’s empowerment, environmental and cultural preservation and peace.

Tourism is estimated to represent 10% of global GDP and generates directly or indirectly one in ten jobs globally. It is a resilient sector, which despite all challenges continues to see international tourist arrivals grow at an annual rate of over 4% since 2009. Generating 7% of all international trade, the sector is also of increasing importance to the trade community. It is important to recall that tourism is a form of services trade and that tourism accounts for 30% of the world’s trade in services. Tourism is of particular value for least developed countries (LDCs), where it represents 7% of total exports of goods and services, a figure that stands at 10% for non-oil LDC exporters. Tourism is also the major economic earner in many small island developing states.

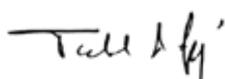
In view of the above, and as shown in this report, tourism has been recognized as a key sector for trade-related technical assistance in LDCs. Forty-five out of 48 Diagnostic Trade Integration Studies – an important coordination instrument for trade-related technical assistance – analysed for this report feature tourism as a key sector for trade development. Accordingly, the Enhanced Integrated Framework (EIF) has become increasingly active in this sector. Close to 10% of its so-called Tier 2 project portfolio is currently dedicated to tourism. This stands in stark contrast with the less than 1% allocated in total Aid for Trade to tourism.

Yet despite tourism’s value in the trade agenda, it is often difficult to direct trade-related technical assistance towards the sector because tourism and trade tend to fall under different line ministries. Successful interventions in tourism require strong collaboration across government agencies as well as across different actors at the regional or local level. The World Tourism Organization (UNWTO) and the International Trade Centre (ITC) are determined to contribute to this process of increased coordination and collaboration by joining their forces in the design and implementation of tourism export strategies.

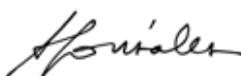
Commitment and investment in coordinating and raising tourism’s prominence in trade-related technical assistance will ensure the sector delivers on its powerful capacity to create jobs and incomes where they are most needed and for those who are most vulnerable – including youth and women. Well-designed projects can also contribute to protect the environment and safeguard cultural diversity and heritage.

Finally, tourism can play an important role in fostering mutual understanding, peace and security. A tool for soft diplomacy, tourism builds bridges between different peoples and creates opportunities for enriching exchanges between visitors and hosts as well as for cross-cultural encounters.

We trust that in these complex times, this joint study aimed at making the most out of tourism’s potential to build better lives in LDCs, can contribute not only to inclusive and sustainable development but also to security and enduring peace.



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Executive summary

Tourism is widely recognized as a key sector for achieving the United Nations Sustainable Development Goals (SDGs), given its major potential to contribute to jobs and wealth in the developing world. Tourism's relevance for development is also reflected in one of the most important coordination instruments of trade-related technical assistance in least developed countries (LDCs): the Diagnostic Trade Integration Studies (DTIS) of the Enhanced Integrated Framework (EIF).

In the 2030 Agenda for Sustainable Development, tourism explicitly features as a target in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Yet, given the sheer size – tourism is estimated to represent around 10% of global gross domestic product (GDP) – and the cross-cutting nature of the sector, it has the potential to contribute directly and indirectly to all 17 SDGs.

Tourism for inclusive growth

Tourism has been estimated to generate one in ten jobs in the world. The sector is considered to create many jobs for vulnerable segments of the labour market including the young and women. As such, growth in tourism can contribute directly to the inclusiveness of growth. The tourism sector has also shown significant resilience. Despite recent slow economic growth and geopolitical tension in some regions of the world, international tourist arrivals have experienced an annual increase of around 4% since 2009. Tourism currently represents 7% of total world exports, 30% of world services exports and its importance for trade continues to grow.

Not surprisingly therefore, tourism has gained importance within the international development agenda over the past few years, and the transition to the SDGs has solidified this trend. Selecting 2017 as the International Year of Sustainable Tourism for Development has put the spotlight on tourism in the first years of implementation of the SDGs.

EIF support is based on DTIS and their action matrices. These studies are conducted at the request of LDCs and encompass a review of the macroeconomic environment, regulatory and trade policies, the business climate, and country competitiveness. Their emphasis varies depending on the needs and priorities of the requesting government. The analysis is enriched by a focus on priority sectors for tradable goods and services, typically including tourism.

For the purpose of this report, the World Tourism Organization (UNWTO) together with the EIF Executive Secretariat and the International Trade Centre (ITC) reviewed 48 DTIS and their action matrices. In addition, national implementation units and national tourism authorities were consulted via a questionnaire. The collected information was examined using the framework developed in the *Sustainable Tourism for Development Guidebook* (2013, UNWTO for the European Commission Directorate General for International Cooperation and Development).

Diagnostic Trade Integration Studies : Three major findings

1. LDCs recognize tourism as a sector with significant potential for stimulating growth, promoting development, job creation, poverty reduction and improving their international reputation: 45 out of 48 analysed DTIS have tourism chapters or tourism references: 32 in Africa, six in Asia, one in the Americas, and six¹ in the Pacific.
2. The tourism-related references made in the DTIS tend to focus on the economic facets of tourism: Among the five key pillars for sustainable tourism, the second pillar *Economic performance, investment and competitiveness* is by far the most frequently referenced pillar in all DTIS. The first pillar *Tourism policy and governance* follows at a distance.
3. The DTIS is hardly or not at all used for communication with donors on tourism-related technical assistance, neither on the trade side nor on the tourism side.

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