TOURISM AND TRADE: A GLOBAL AGENDA FOR SUSTAINABLE DEVELOPMENT

International Trade Centre

UNWTO

TOURISM AND TRADE:

A GLOBAL AGENDA FOR SUSTAINABLE DEVELOPMENT

Abstract for trade information services

ID= 43159 2015 S-15.09 TOU

International Trade Centre (ITC), World Tourism Organization (UNWTO)
Tourism and Trade: A Global Agenda for Sustainable Development
Geneva: ITC/UNWTO, 2015. xi, 36 pages.
Doc. No. **SC-15-335.E**

The joint report of the International Trade Centre and the World Tourism Organization brings together complementary expertise of two organizations on critical issues at the intersection of the international policy context, government action, and private actors in the tourism sector. It discusses the role of tourism in contributing to sustainable development and illustrates where and how trade, investment or visa policies matter for the tourism sector through two different angles – the point of view of the journey of an international tourist and the point of view of a firm supplying services or goods within a tourism value chain. The report further provides a comprehensive description of the interlinkages the tourism sector has with other sectors in an economy; suggests that fulfilling tourism's potential requires strong and coordinated action around Tourism Export Strategies that take fully into account the different frameworks governing the flows of travellers, services, goods and foreign direct investment; includes bibliographical references (p. 35-36).

Descriptors: **Tourism and Travel Services, Sustainable Development.**

English

For further information on this technical paper, contact Ms. Marion Jansen (jansen@intracen.org)

Citation: International Trade Centre and World Tourism Organization (2015), *Tourism and trade: A global agenda for sustainable development,* ITC, Geneva.

The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations.
ITC, Palais des Nations, 1211 Geneva 10, Switzerland (www.intracen.org)

The World Tourism Organization (UNWTO) is a United Nations specialized agency.
UNWTO, Capitán Haya 42, 28020 Madrid, Spain (www.unwto.org)

UNWTO printed version: 978-92-844-1726-1
UNWTO electronic version: 978-92-844-1727-8

Acknowledgements

This paper is a joint collaboration of the International Trade Centre (ITC) and the World Tourism Organization (UNWTO).

It was prepared by Marion Jansen (Chief Economist, ITC) and Zoritsa Urosevic (Representative to the United Nations in Geneva, UNWTO) with contributions from Irene Carbone (consultant, Trade in Services, ITC), Jane Drake-Brockman (Head of Services Programme, ITC), Dale Honeck (Trade in Services Councillor, WTO), Max Thompson (international consultant, ITC) and Jasmeer Virdee (trade analyst, Office of the Chief Economist, ITC).

Thanks are due to Anders Aeroe (Director of Division for Market Development, ITC), Anton Said (Head of National Export Strategies, ITC), Robert Skidmore (Head of Sector Competitiveness, ITC), John Kester (Director of Market Intelligence and Promotion, UNWTO), Sandra Carvao (Chief of Communication and Publications, UNWTO), Rosa Ruffo (consultant, UNWTO), Claudia Lisboa (technical coordinator, UNWTO), and Justine Lan (consultant, ITC) who provided inputs and comments.

We would also like to thank Natalie Domeisen (ITC) who oversaw production and quality control and Serge Adeagbo and Franco Iacovino (ITC) who provided graphic and printing support.

Contents

Acknowledgements iii
Tables v
Abbreviations vi
Foreword vii
Executive Summary ix

1. Tourism: Think sustainability, think international trade 1

1.1 International tourism is international trade 2

1.2 Tourism is a key sector for development 4

2. Looking at tourism from different angles 7

2.1 The tourist journey 7

2.2 The tourism value chain 10

3. Unlocking tourism potential 15

3.1 Acting at the national and international level 15

3.2 Specialized institutions and the role of private stakeholders 19

3.3 The capacity of tourism service providers 19

3.4 National Tourism Export Strategies 20

3.5 Strategizing requires measurement 21

4. Current commitments to unlocking tourism potential 23

4.1 Trade policy 23

4.2 International assistance to tourism 25

5. Joining forces to unlock tourism: ITC and UNWTO 33

References 35

Figures

Figure 1. Why tourism matters 1
Figure 2. International tourist arrivals received and expected, 1950 – 2030 (million) 2
Figure 3. International tourism (BOP Travel & Passenger transport) and export, world (US$ billion) 3
Figure 4. Overview: The tourism journey from the tourist perspective 8
Figure 5. The tourism value chain 11
Figure 6. Main operational difficulties for suppliers 13
Figure 7. DTIS tourism references by UNWTO Tourism Development Sub-Pillars 18
Figure 8. Use of websites and emails by company size 21
Figure 9. Number of commitments under the GATS by services sub-sector 23
Figure 10. Total AfT Disbursements shares by category, 2006-2013 27
Figure 11. Aggregate trade-related OOF disbursements, 2002-2013 28
Figure 12. Main donors of tourism-related ODA disbursements, 2013 31

Tables

Table 1. Linkages in the tourism sector 14
Table 2. Selected offers under the LDC Services Waiver: a tourism value chain perspective 25
Table 3. AfT tourism disbursements per DAC income group (US$ thousand) 29
Table 4. Average per country AfT tourism disbursement by income groups (US$ thousand) 29
Table 5. AfT tourism disbursements to main recipients, 2006-2011 (US$ million) 29
Table 6. Major donors in 2013, total ODA and tourism (gross disbursements, constant prices) 31

Boxes

Box 1. Sustainable tourism and Rio+20 5
Box 2. What makes international tourism international trade? 16
Box 3. Tourism: Key export sector for LDC development 18
Box 4. Data collection exercises relevant for the tourism sector 22
Box 5. Vanuatu EIF Tier 2 Tourism Project on Infrastructure 30

Abbreviations

The following abbreviations are used:

10YFP	10 Year Framework of Programmes
AfT	Aid for Trade
BOP	Balance of Payment
CSI	Coalition of Services Industries
DAC	Development Assistance Committee
DMO	Destination management organisation
DTIS	Diagnostic Trade Integration Studies
EIF	Enhanced Integrated Framework
FDI	Foreign direct investment
GATS	General Agreement on Trade in Services
GDP	Gross domestic product
ITC	International Trade Centre
LDC	Least developed country
LLDC	Land-locked developing country
LMIC	Lower middle income country
MADCT	More advanced developing countries and territories
MDG	Millennium Development Goal
ODA	Official development assistance
OECD	Organization for Economic Cooperation and Development
OOF	Other official flows
PPD	Public private dialogue
SDG	Sustainable development goal
SIDS	Small Island developing States
SME	Small and medium-sized enterprise
SPS	Sanitary and phytosanitary measures
TES	Tourism Export Strategy
TSA	Tourism Satellite Account
UMIC	Upper middle income country
UN	United Nations
UNWTO	World Tourism Organization
WEF	World Economic Forum
WTO	World Trade Organization

Foreword

International tourism accounts for 30% of global trade in services. In 2014, there were 1.1 billion international tourist arrivals up from 25 million in 1950, generating US$ 1.5 trillion in exports **(international tourism receipts and passenger transport)**. For around one-third of developing countries, tourism is their principal export. The sector, which is estimated to represent 10% of global GDP and one out of every eleven jobs worldwide, is expected to continue expanding significantly to reach 1.8 billion international tourists in 2030.

Tourism has, therefore, a key role to play in maximizing the contribution of trade in services to development, job creation, and the achievement of the 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs).

Tourism's deep interlinkages with other activities across the economy, relative low entry costs and potential benefits for local and often marginalized communities is reflected in the fact that it is the only services sector singled out in the SDGs. This international spotlight provides a unique opportunity to make the most of the sector's potential contribution to sustainable development.

Yet, the sheer **complexity of the tourism value chain, with its myriad of players, means that** fulfilling tourism's potential requires strong and coordinated action around **Tourism Export Strategies** that take fully into account the different frameworks governing the flows of travellers, services, goods and foreign direct investment (FDI).

To foster such coordinated action, the International Trade Centre (ITC) and the World Tourism Organization (UNWTO) have joined hands to bring together our complementary expertise on critical issues at the intersection of the international policy context, government action, and private actors in the tourism sector.

We will work to promote a deeper understanding of the links between the **tourism and trade agendas**, in turn enabling more supportive policies. In a sector where a country's 'brand' shapes prospects for every individual tourism supplier –the action of a single supplier can also, if it goes viral on social media tarnish a country's image –, we will build partnerships among public and private stakeholders to encourage positive spillovers.

We will place particular emphasis on strengthening the capacity of **tourism sector suppliers in developing countries,** with a focus on integrating small and medium-sized enterprises (SMEs) into regional and global tourism value chains. Finally, we will work to improve tourism-related data as statistical information on the many facets of the sector is pivotal in informing policy decisions, monitoring progress, and promoting results-focused management.

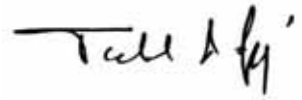
Looking ahead, it is our firm belief that the enormous potential of the tourism sector for growth and job creation justifies **increasing the amount of aid towards tourism and expanding the size of tourism**

projects. In 2013, only 0.78% of Aid for Trade (AfT) disbursements went to tourism, even though the sector accounts for 6% of developing countries' exports. ITC and UNWTO call for allocating more AfT to the tourism sector, together with a shift to more comprehensive tourism projects that reflect the sector's full value chain.

This report stands as testimony to our shared commitment to work towards a stronger articulation of the tourism-trade nexus in international, regional and national policy agendas, an enhanced public-private sector dialogue and better capacity for the private sector to maximize its role in the tourism value chain. We trust the report will serve as a stepping stone in maximizing tourism's contribution to the 2030 Agenda for Sustainable Development as a critical sector of global services trade and as immense opportunity to promote inclusive development and social transformation for all.

Arancha Gonzalez

Executive Director
International Trade Centre (ITC)



Taleb Rifai

Secretary-General
World Tourism Organization (UNWTO)

Executive Summary

Over recent decades, tourism has enjoyed rapid growth and geographic diversification, becoming one of the fastest-growing and most important economic sectors worldwide, contributing nearly 10% to world gross domestic product (GDP) and generating one in eleven jobs globally.

With US$ 1.5 trillion in export earnings, international tourism (travel and passenger transport) accounts for 30% of the world's exports of services and 6% of overall exports of goods and services. As a worldwide export category, tourism ranked fourth in 2013, after fuels (US$ 3.3 trillion), chemicals (US$ 2.0 trillion), food (US$ 1.5 trillion), and ahead of automotive products (US$ 1.3 trillion).

Developing countries play an increasingly important role in this growing sector. Emerging and developing economies currently account for 45% of all international tourist arrivals, and this share is expected to reach 57% by 2030. The tourism sector is contributing to economic growth in those countries – and offers significant further potential. Tourism is employment intensive and has linkages into many other parts of the economy. It contributes directly to poverty reduction – notably among women, recognized by policymakers both at the national and international level.

2015 is an important year for trade and development. 2015 will witnesses the transition from the Millennium Development Goals (MDGs) to the new 2030 Agenda for Sustainable Development and its Sustainable Development Goals (SDGs). Tourism is specifically identified in SDGs 8, 12 and 14 highlighting the sector's potential to contribute to economic growth, social inclusion and environmental preservation. To fully achieve this potential, a more strategic approach towards the links between tourism, trade and all stakeholders along the tourism value chain is essential.

The tourist's journey and the exchanges among the various actors of the value chain involve cross-border activities that may touch upon policies or regulations in the countries involved. Many of those activities fall within the realm of international trade or capital flows.

This report illustrates where and how trade, investment or visa policies matter for the tourism sector through two angles: one, through the journey of an international tourist and two, from the point of view of the tourism industries and operators as well as firms' supplying services or goods within the tourism value chain. Together, these two stories provide a comprehensive description of the complex level of interlinkages the tourism sector has with other sectors in an economy.

Looking at tourism via the tourist journey or through the lens of the tourism value chain has three advantages:

- It allows for the identification of bottlenecks along the journey or within the value chain and enables the design of trade and investment policies with a view on reducing those bottlenecks;
- It allows for the identification of opportunities to intensify backward linkages into the local economy and thus enhance the sustainable development impact of tourism at country level;
- It enables better strategic alignment on the policy set and the institutional set-up necessary to unlock the tourism potential.

Unlocking tourism's potential requires integrating policy dimensions that fall within the arena of international trade and FDI into tourism planning and ensuring that tourism is part of national strategies in these areas. To do so, it is essential to identify action requirements at the national level, at the firm level and regarding sector-specific and local institutions. In this report the following areas of action are identified:

- At the national and international level:
    - Trade, investment and visa policies;
    - Branding, marketing and product positioning;
    - Resilience and risk management.
- Strengthening tourism specific institutions and public private dialogue (PPD);
- Strengthening the capacity of tourism providers which allows them to offer a services portfolio and quality in line with the country's marketing strategy;
- Designing national Tourism Export Strategies (TES) that complement Tourism Master Plans and Strategies with an export-oriented vision for the entire sector, taking into account all aspects of the tourism value chain, backwards and forwards, across all sectors of the economy;
- Gathering and dissemination of statistical information on tourism to promote results-focused management, and highlight strategic issues for policy decisions.

The above is particularly relevant in the context of supporting developing countries to be more competitive in the global tourism market. Developing countries can benefit from a supportive trade policy environment and from technical assistance in order to develop their tourism sector. Recent offers made under the World Trade Organization (WTO) LDC Services Waiver offer new opportunities for least developed countries (LDCs). In addition, developing countries take advantage from AfT directed to the tourism sector.

The sector is still clearly underrepresented in aid flows, accounting only 0.09% of Official Development Assistance (ODA) and 0.78% of AfT in tourism in 2013, while tourism is estimated to contribute nearly 10% to global GDP. In addition, average spending per tourism project is small compared with project size in other sectors and hovers around US$ 500,000 per project. The question arises whether the present size of individual tourism projects allows to sufficiently account for sectoral interlinkages and to generate maximum benefits of assistance to the sector.

Increased coordination among donors and implementing agencies can help to design and implement more comprehensive tourism projects that are more effective in enhancing tourism's contribution to sustainable development.

It is in this context that ITC and UNWTO have entered into a strategic partnership to aggregate the two organizations' resources and competencies, promote a more effective implementation of AfT in tourism, and generate greater donor interest in funding tourism activities for the benefit of developing countries.

1. Tourism: Think sustainability, think international trade

Over recent decades, tourism has registered rapid growth and geographic diversification, becoming one of the fastest-growing and most relevant economic sectors worldwide. Today, tourism is estimated to contribute nearly 10% to global GDP, considering its direct, indirect and induced impacts. According to UNWTO, in 2014, there were 1.1 billion international tourist arrivals, up from a mere 25 million in 1950. These tourists generated US$ 1.5 trillion in exports to the visited economies or 6% of the world's total exports.

Tourism also has an important impact on job creation as it offers a direct and accessible entry point into the workforce, particularly for women and youth in both urban and rural communities, especially in developing countries. It is estimated that one out of every eleven jobs worldwide is directly or indirectly linked to tourism.[1] Importantly, the sector also offers a wide diversity of growing investment opportunities for innovative SMEs and micro businesses.

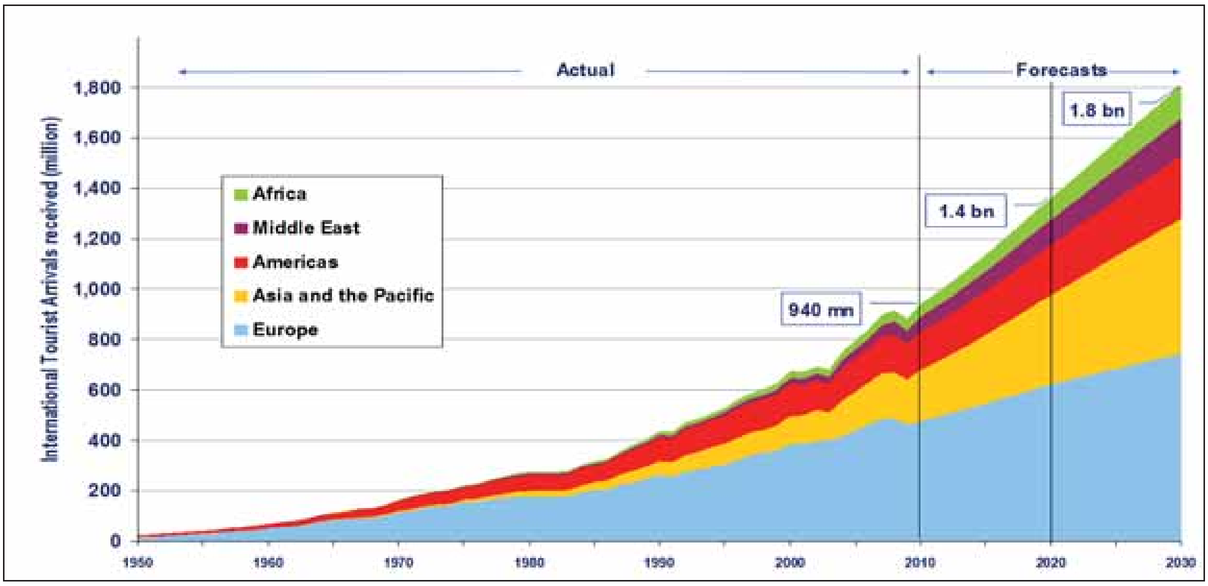
Figure 1. Why tourism matters

Source: UNWTO, 2015

Tourism is expected to continue expanding in the coming decades. UNWTO's long-term forecast, *Tourism Towards 2030*, suggests that international tourist arrivals will reach 1.8 billion by 2030, or 5 million a day. Emerging economies, currently accounting for 45% of all international tourist arrivals, are expected to see their share increase to 57% by 2030.[2]

[1] UNWTO, Tourism Highlights, 2015.
[2] UNWTO, Tourism Towards 2030, 2011.

Figure 2. International tourist arrivals received and expected, 1950 – 2030 (million)



Source: UNWTO, Tourism Towards 2030, 2011.

Yet, international tourism only represents a part of the whole tourism sector. In many countries, domestic tourism accounts for a significant share of the sector's income, representing as much as 50% or more of the total in many advanced economies.

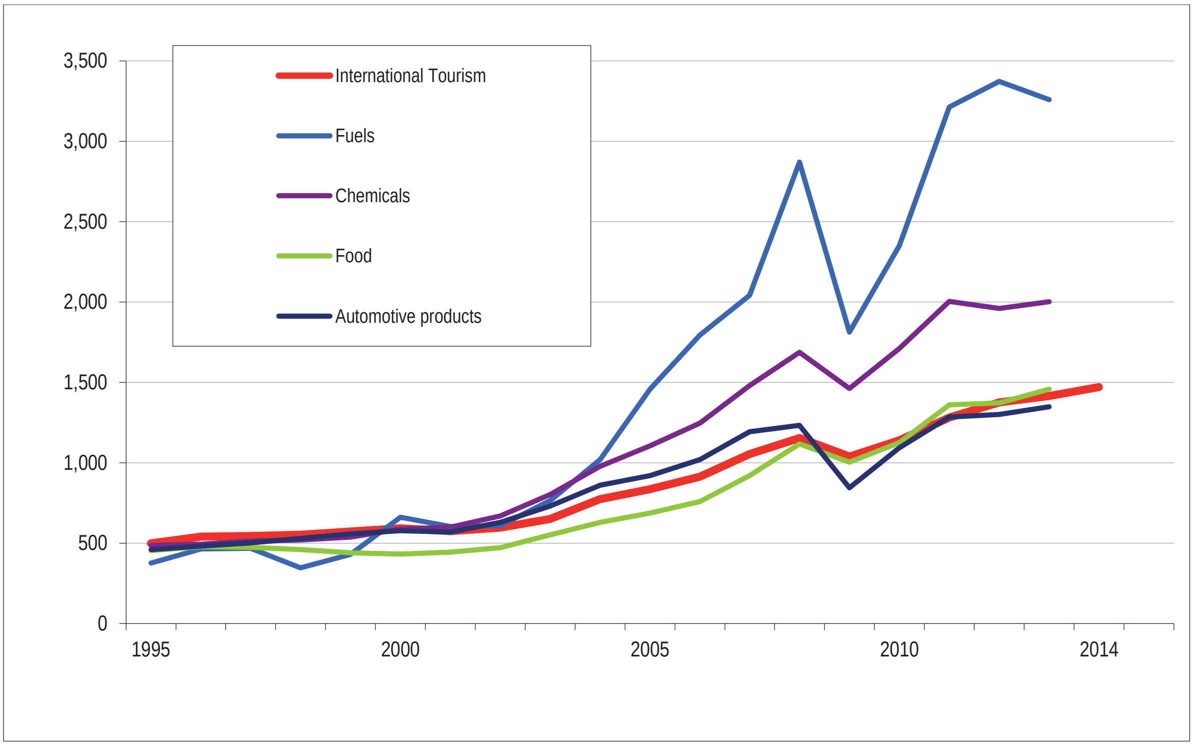
This report focuses on international tourism as part of international trade – international tourism is part of the Balance of Payments (BOP) under the categories 'travel' and 'passenger transport'. Through the rest of the report the term 'tourism' will therefore refer to international tourism and the term 'trade' to international trade.

1.1 International tourism is international trade

Expenditure by international visitors counts as exports for the destination country and as imports for the country of residence of the visitor. In BOP, receipts from inbound tourism are reported as travel credit under the services balance and expenditure on outbound tourism as travel debit.

For many countries, international tourism is an important source of foreign currency earnings. In 2014, international tourism generated US$ 1,245 billion in tourism receipts in destinations (BOP travel) plus an estimated US$ 221 billion in passenger transport, bringing total tourism export earnings up to US$ 1.5 trillion in 2014, or US$ 4 billion a day on average. This represents as much as 6% of overall exports of goods and services and 30% of the world's exports of services.

Figure 3. International tourism (BOP Travel & Passenger transport) and export, world (US$ billion)



Source: UNWTO/WTO (2015)

As a worldwide export category, tourism ranked fourth in 2013 (2014 data not yet available for commodity trade categories), after fuels (US$ 3.3 trillion), chemicals (US$ 2.0 trillion), food (US$ 1.5 trillion), and ahead of automotive products (US$ 1.3 trillion). Broken down by advanced and emerging economies, the percentage of tourism in overall export earnings does not vary much: 6.5% and 5.5% respectively. Tourism also ranks as fourth largest export category in both groups, though the order of the other categories varies.

For the group of advanced economies, tourism generated US$ 962 billion in exports in 2014 (US$ 815 billion in travel and US$ 147 billion in passenger transport). For this group, tourism ranked fourth as an export category in 2013 after chemicals, including pharmaceuticals (US$ 1,552 billion), fuels (US$ 1,074 billion) and automotive products (US$ 1,040 billion), but ahead of food (US$ 816 billion).

Tourism ranks as the top export earner in many emerging economies, including several LDCs, among which Burkina Faso, Gambia, Haiti, Madagascar, Nepal, Rwanda and Tanzania. For the group of emerging economies as a whole, tourism generated US$ 503 billion in exports in 2014 (US$ 430 billion in travel and US$ 73 billion in passenger transport). As an export category, tourism ranked fourth in 2013 after fuels (US$ 2,183 billion), food (US$ 641 billion) and textiles and clothing (US$ 496 billion), but ahead of chemicals (US$ 449 billion).

Although ‘fuels’ is the largest export category worldwide, and even more so for emerging economies, earnings are heavily concentrated in a few large oil, gas and coal exporters. By contrast, many more countries benefit from tourism, which also tends to generate more employment. It is interesting that throughout the 2009 downturn, international tourism was rather more resilient than other trade categories, decreasing only by 5% in real terms, compared to overall exports declining by 11%.

1.2 Tourism is a key sector for development

Tourism is recognized as having numerous characteristics that render it especially valuable as an agent for development and a driver for socio-economic progress. Because it encompasses a wide range of goods and services sectors, tourism generates multiplier effects across many other economic activities in the tourism value chain, penetrating the local economy and expanding the growth impact from trade.

Tourism was identified as a key sector for development in the Istanbul LDC Programme of Action (2011), in the Samoa Pathway for Small Island Developing States (SIDS) (2014) and the Vienna Programme of Action for Land-Locked Developing Countries (LLDCs) (2014). Tourism is one of the sectors highlighted to drive the shift towards a Green Economy (2011) and is described in the Rio+20 Outcome Document ‘The Future We Want’ (2012) as a sector capable of making ‘a significant contribution to the three dimensions of sustainable development’, i.e. environmental, social and economic.[3] UNWTO defines sustainable tourism as ‘tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’[4].

Sustainable tourism has also been identified as one of the key areas[5] of work in the 10 Year Framework of Programmes on Sustainable Consumption and Production (10YFP). Adopted at the RIO+20 Conference, it will encourage innovation and cooperation among stakeholders and accelerate the shift in the way our societies produce and use goods and services. The Sustainable Tourism Programme is one of six initial 10YFP programmes agreed at the RIO+20 Conference, and is related to SDG 12 as a means of implementation. It is led by UNWTO, the specialized United Nations agency for tourism and co-led by the governments of France, the Republic of Korea, and Morocco, and brings together a variety of stakeholders partnering for its effective implementation.

This demonstrates that at the global policy level, tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and the potential to create decent jobs as well as generate trade opportunities.

[3] Rio+20 (2012). The Future We Want. 1. 30, June. Available from: http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/docpdf/rio20outcomedocument.pdf

[4] UNWTO and UNEP (2005) *Making Tourism More Sustainable – A Guide for Policy Makers*.

[5] The 10 Year Framework of Programmes on Sustainable Consumption and Production (10YFP) is a global framework of action designed to enhance international cooperation to accelerate the shift towards sustainable consumption and production (SCP) in both developed and developing countries.

Box 1. Sustainable tourism and Rio+20

RIO+20
the future we want

Sustainable tourism in *The Future We Want* Rio+20 outcome document

"130. We emphasize that well-designed and managed tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities (…)

131. We encourage the promotion of investment in sustainable tourism, including eco-tourism and cultural tourism, which may include creating small and medium sized enterprises and facilitating access to finance, including through microcredit initiatives for the poor, indigenous peoples and local communities in areas with high eco-tourism potential (…)"

Read more:
http://icr.unwto.org/en/content/rio20-future-we-want (full outcome document)
http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_greeneconomy_leaflet.pdf
(Green Economy Report leaflet)

The year 2015 is set to be a milestone for sustainability as governments are called upon to adopt the 2030 Agenda for Sustainable Development for the next decade and a half at the United Nations Summit in New York. The Agenda is transformative and people-centred with bold, ambitious targets for a more sustainable future elaborated through the collective engagement of a broad range of stakeholders. In this context, tourism's inclusion in the SDGs as a target in SDGs 8, 12 and 14[6] provides a unique opportunity to fully fulfil the potential development from international tourism. Yet, doing so requires a more strategic approach towards tourism development and a closer dialogue between tourism, trade and other relevant stakeholders.

6 The new SDG agenda mentions 'sustainable tourism' as a crucial component for social and economic development . Three of the SDGs include a focus on sustainable tourism. The target, 'by 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products,' falls under Goal 8, 'promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all'. The means of implementationt, 'develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products', falls under goal 12, 'ensure sustainable consumption and production patterns'. The target, 'by 2030, increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism', falls under goal 14, 'conserve and sustainably use the oceans, seas and marine resources for sustainable development'. Available from https://sustainabledevelopment.un.org/content/documents/7891TRANSFORMING%20OUR%20WORLD.pdf

2. Looking at tourism from different angles

UNWTO defines tourists as people 'travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.' What sounds like a simple and straightforward definition hides a complex set of transactions, many of which involve the policies and regulations of different countries. Because of this complexity, tourism touches upon a broad range of different policy areas. Expenditures by international visitors count as exports for the destination country and as imports for the country of residence of the visitor. International tourism is trade. Tourism is therefore a matter of relevance for trade policymakers, and many decisions taken in the realm of trade policy will affect the tourism sector.

The why and how will be illustrated in this section, by looking at the tourism sector from two angles: from the angle of a typical tourist who undertakes international travel; and from the angle of a goods or services provider active within the tourism value chain. It is important to show at what stages of the journey international transactions take place.

Whenever the tourist's journey or exchanges among actors within the value chain involve cross-border activities, those activities may touch upon policies or regulations in the countries involved. Many of those activities will fall within the realm of international trade or capital flows, an important exception being activities related to visa procedures.

Whenever foreign tourists make local purchases in the destination country, tourism represents a services export for the destination country and a services import for the tourist source country. Like the transactions in other services sectors, tourism transactions are therefore ruled by the provisions and commitments in the WTO's General Agreement on Trade in Services (GATS). Whenever tourism providers within the value chain import or export goods or services, however, tariffs or non-tariff measures falling under provisions in other WTO or regional agreements may become relevant.

2.1 The tourist journey

Tourists travel from their country of origin to a destination or destinations of their choice, before returning home to share their experiences. While the tourists' actions are simple, every international journey, independent of the distance or duration, involves many service providers and organisations that make the journey possible. Some are directly involved in the provision of services to the tourist, while others work in the background and enable the framework conditions for tourism to take place. In its most simple form, the tourist journey has three phases: before the journey, during the journey, and after the journey. Figure 4 shows a simplified overview of these stages, identifying the tourist actions, the related service providers, and other organisations that are involved.

Figure 4. Overview: The tourism journey from the tourist perspective

Before the journey

This is the preparation stage, where tourists research potential destinations based on the experience they desire. They inform themselves about options and plan their journey. This research also relates to visa requirements, payment options (credit cards, foreign exchange, etc.), and necessary vaccinations.

Once they decide on a destination, they will book their travel arrangements and other services, apply for visas (where mandatory), arrange insurance, and probably change some currency. All this involves immigration departments in the destination and possible transit countries. This means that policies must be put in place for issuance of visas and the movement of air passengers. Nowadays, developing countries often allow for visas on arrival, which makes this step easier for tourists. However, special attention is needed when travelling for business, non-governmental organization or official purposes, where visa restrictions are often more stringent. This is very country specific and requires good data provision by the embassies and service providers. In some cases, such as Chinese outbound travel, tour operators add significant value by making visa arrangements very easy.

The example of travel insurances reflects why services other than tourism services are of relevance for the travel journey. Whether foreign insurances are recognized in the destination country, notably determines what type of international transactions (i.e. trade) is involved in case of accidents or health problems within the destination country.

Travel arrangements are often made through tour operators. Whether those operators are based in home, destination or third countries, influences how much of the tourist's journey's value will be captured by the destination country. In the end, GATS commitments regulate whether foreign tour operators are free to sell their services to domestic tourists.

During the journey

The journey and time spent within the destination is where the tourist experience occurs as well as where most of the value is created for tourism service providers and the economy of the destination country. Depending on the route and distance travelled, the travel from the country of origin to the destination might be undertaken with the national airline of the origin country, the destination country, or a transit country. Therefore, the value added from the tourist's journey may have a positive impact on numerous countries along the route. Where transit visas or customs clearances are required, these affect how the tourist travels, and policies need to be in place on how to handle tourists passing through.

Once the tourist arrives in their destination of choice, most of the value added typically flows into the local economy.[7] Many different stakeholders are involved in providing the destination experience, and good coordination is a key success factor. Local government agencies and the destination management organisation (DMO), if one exists, often play a major part in setting the framework conditions for tourism service provision.

At the national level, framework conditions may relate to import or taxation policies for foreign luxury goods and other imported products that are consumed by tourists. Tourists often demand some 'home comforts', and therefore large amounts of foreign goods are necessary to satisfy tourist needs in the destination. In the case of liquor, for example, this can lead to challenging policy situations, where the country might not usually allow for liquor consumption. This often leads to zoning discussions where 'tourist zones' or certain establishments (5-star hotels, for example) can attain special licenses to provide services to tourists that are otherwise not permitted in the destination.

Imports of specialized equipment and services such as solar technology, are often used in the development and building of new resorts in developing countries. This equipment allows for a more sustainable development of resorts, benefitting the host country and increasing their competitiveness. However, special provisions must be made for the import of this equipment to ensure that high import taxes or regulations do not make sustainable technologies prohibitively expensive. Tourists can encourage the development of sustainable services by choosing such service providers over others.

Throughout their destination experience, tourists are in contact with local service providers. Destination organisations and governments are important influencers in ensuring that the services for tourists are up to international standards, for example in terms of health and safety. The national and local governments need to devise policies that ensure that tourists can safely enjoy the destination. In some destinations like Bhutan, for example, this involves the classification of tourist hotels and regular reviews to ensure that tourist hotels meet minimum service standards for international tourists.

On their departure, tourists often take souvenirs with them, having a positive economic impact on the destination's economy, especially if produced locally. However, in some cases there are export restrictions for some goods, such as artefacts or wildlife products that tourists may not be aware of.

[7] The level of local value added is directly related to the capacity to supply tourism-related goods and services domestically. New tourism destinations in LDCs often require substantial foreign investment and other inputs, resulting in high levels of 'leakages', but this initial situation – which nonetheless often provides substantial local employment opportunities -- should be addressed over time with the promotion of local investments, creation of domestic supply chains, training programs, etc.

Local governments or conservation agencies are often involved in monitoring these restrictions, and providing information and support to tourists. Trade policies on certain dangerous or protected goods, like sanctions on ebony for example, may set the framework conditions to discourage local exploitation of cultural or natural resources for tourists.

Overall, the support services and framework-setting policies make the tourist's journey through the destination possible. Tourists are often not aware of all the policies, and it is up to national and local tourism offices to inform tourists of their rights and responsibilities when visiting a destination.

After the journey

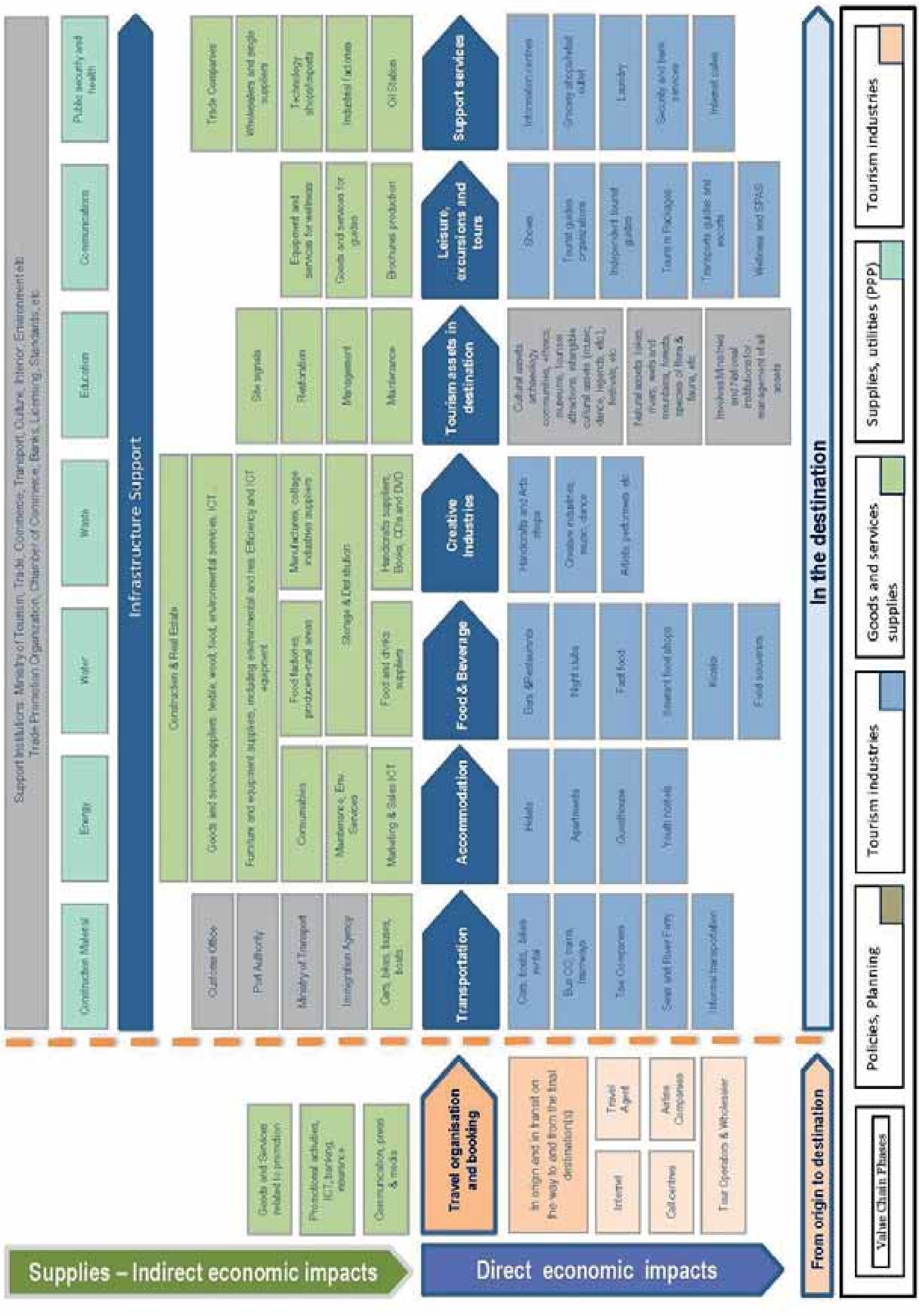
After their return home, tourists share their experience with people they know or more widely through online review portals or travel agents. These reviews can have serious negative implications for the service providers in the destination if the service did not match the tourists' expectations. DMOs or local government agencies can use the reviews as input to design new policy measures that support their industry in providing better service in the future. For example, if reviews show that service levels are not meeting international expectations, local government can address the issue of quality and standards for the service providers as well as create training programmes that will help upskill hotel staff. Especially in developing countries, these training or workforce development measures are often financed and implemented in collaboration with international development or sometimes through AfT programmes.

At various stages along the tourist's journey, tourists and service providers rely on mechanisms that must be set up in advance as part of trade policy negotiations between governments. Relevant examples include the provision of duty free shopping, imports of luxury goods and other foreign products and services into destination countries for tourist consumption, and air travel arrangements. In many ways, trade policies help to set the framework conditions that make international tourism possible. Arguably, a favourable tourism experience can lead to a positive impression of foreign goods and services, smoothing the path for future export initiatives.

2.2 The tourism value chain

The tourism value chain includes all transactions occurring for tourism services providers – in the source market and at the destination – and the supply of goods and services related to them. It reflects to a large extent the same activities as the 'tourist journey', but looks at those perspectives from a different angle: the angle of tourism services providers. One representation of the global tourism value chain is mapped in Figure 5. It shows the complexity of the sector, and how each aspect could relate to trade policies

Figure 5. The tourism value chain



Source: UNWTO/ITC/WTO, based on UNWTO-EC Sustainable Tourism for Development (2013)

To the left of the dotted orange line, the figure illustrates activities that take place in the outbound country (i.e. the tourist's country of residence). These relate mainly to activities before and after the journey, so during the planning, booking, and sharing phases, as well as the transport to and from the final destination(s). On the right of the line, the diagram shows the activities in the inbound country (i.e. destination country). A myriad of actors are involved in the direct provision of tourism services as well as the linkages into the production sector and the supportive industries and institutions.

The pink boxes describe those actors assisting the travellers in planning and booking their journey, travelling to and from the destination, and sharing the experience after they return home. The dark blue arrows describe the primary steps during the tourists' journey, and the light blue boxes below them list the providers directly involved in delivering the core tourism experience. The green boxes show the linkages into the local and international economy, where goods and support services are sourced to provide the core tourism experience. The grey boxes show policy and planning actors providing the framework conditions for tourism.

Linkages and leakages

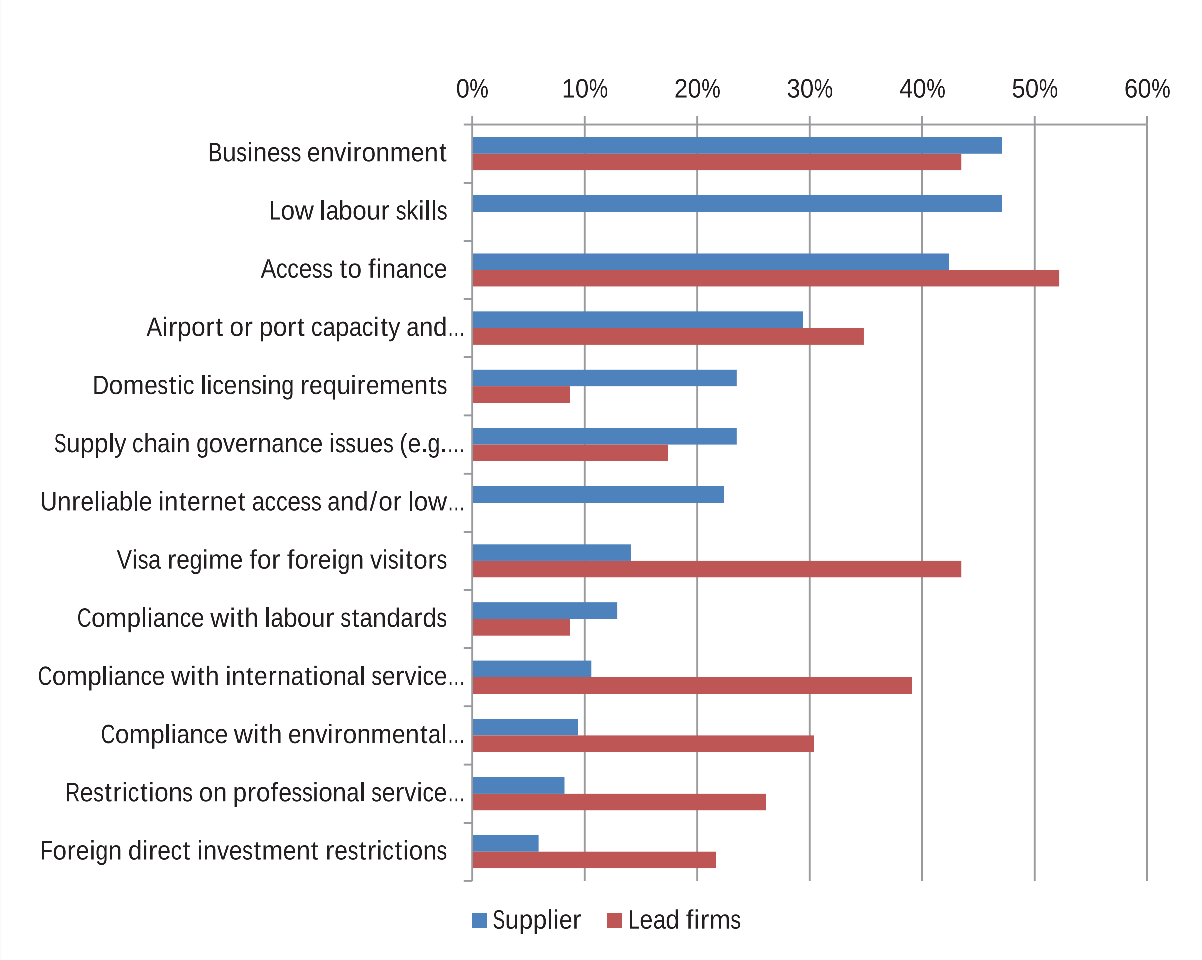
Suppliers and utilities provide the supportive infrastructure that allows the tourism sector to function. If any of these supportive supplies or services are sourced outside of the local economy, leakages occur and value added from the tourism journey flows out of the local economy.

In economic terms, all imports of equipment or consumables for tourist consumption are seen as leakages to the local economy's value creation. In the short term, these leakages may be inevitable, but in the long run, local producers may be able to build capacity to substitute imported products with their own tourist quality production units, thus being more sustainable. The local economy will gain additional value and will strengthen its linkages with the tourism sector. Nevertheless, there are challenges, as shown in a joint OECD/UNWTO/WTO study (2013).

The study showed that both suppliers and lead tourism firms identified 'inability of local suppliers to meet international hospitality standards', the 'business regulatory environment' and the 'inability of local suppliers to meet food quality of safety standards' as the major bottlenecks for backward integration into the local economy (Figure 6).[8] These are the reasons why 75% of tourism firms in the study described imports of goods for touristic purposes as essential or at least very important. Therefore, AfT projects aiming at strengthening the local production sector in developing economies are also indirectly supporting tourism actors in sourcing their ingredients, supplies and services for tourism consumption locally.

[8] OECD/UNWTO/WTO (2013). Aid for Trade and Value Chains in Tourism. Available from: https://www.wto.org/english/tratop_e/devel_e/a4t_e/global_review13prog_e/tourism_28june.pdf

Figure 6. Main operational difficulties for suppliers



Source: OECD/UNWTO/WTO (2013)

Blockages and inefficiencies at any point along the value chain have negative impact on any other linked activity, adding to doing business and reducing international competitiveness costs. Particularly important are the myriad of services inputs which help provide the glue between the various links along the pathway from conception of product to final market.

Depending on who you ask, the operational problems identified in the survey differ slightly. Suppliers rank issues with the general business environment and low labour skills as the highest hurdles, closely followed by access to finance, which refers to their ability to secure credit for investments. Airport carrying capacity and infrastructure are also ranked highly on the list of operational challenges.

Lead firms in the tourism sector on the other hand, see access to finance as the biggest challenge in bringing developing country suppliers into the supply chain, followed closely by the business environment and problems with the visa scheme for foreign visitors. Compliance with international service standards ranks fourth in their listing of challenges, and this could reflect the lack of qualified labour on the supplier side.

Setting the framework conditions for tourism and trade

Given its multiple international backward and forward linkages into diverse parts of the economy, tourism was identified by the WTO and the Organization for Economic Cooperation and Development (OECD) as one of five key sectors with great potential for high development impact, via connecting local firms with lead firms at many points along the tourism value chain.[9]

Low income countries are, however, not always enjoying the full benefit of tourism for the rest of the economy. Tourism in these countries is indeed characterized by lower indirect effects and higher levels of leakage. Table 1 shows the linkages in countries of different income levels as computed by Lejárraga and Walkenhorst (2010). The authors measure the intensity of linkages by the ratio between indirect and direct contributions of tourism to GDP. The upper-middle income countries appear to be more successful in generating spillovers from tourism activities for the rest of the economy than LDCs.

Table 1. Linkages in the tourism sector

	2000-2005			2006-2011		
	Direct	Indirect	Indirect/ direct	Direct	Indirect	Indirect/ direct
LDC	3.65	5.20	1.43	4.07	5.98	1.47
OLIC	2.73	4.54	1.67	4.31	6.13	1.42
LMIC	4.21	6.16	1.46	4.50	7.00	1.56
UMIC	6.35	11.20	1.76	6.29	11.66	1.85

Source: Lejárraga and Walkenhorst (2010), authors' calculation based on World Travel and Tourism Council (WTTC) data. 'Indirect' effects have been calculated based on the difference between total and direct effects as reported in WTTC statistics.

The actors helping to provide the framework conditions for tourism during their travel to and from the destination and within the destination itself are the type of institutions that can assist countries in optimizing the benefits from tourism (grey boxes in Figure 5).

As an example, DMOs are often a vehicle to coordinate tourism activities and maintain tourism assets in the destination. AfT projects are often involved in funding the establishment of local DMOs in developing countries. To ensure the sustainability of these organizations beyond the project funding horizon, implementing agencies should involve local actors from the beginning to align the stakeholders and create a sustainable business model that benefits the local economy. If DMOs are established successfully, they can act as coaches to local businesses; provide education to operators; and bundle activities and services for tourists visiting the destination.

[9] OECD/UNWTO/WTO (2013). Aid for Trade and Value Chains in Tourism. Available from https://www.wto.org/english/tratop_e/devel_e/a4t_e/global_review13prog_e/tourism_28june.pdf

3. Unlocking tourism potential

The success of tourism as a development tool depends on awareness of the contribution and potential of the sector, the identification of strategic priorities, the clarity and relevance of the actions proposed, and the level of commitment to their implementation. This equally requires that the governance structures and processes that support and manage tourism are sound and effective. A key factor is the engagement of the private sector and other stakeholders, alongside governments, both at a national and at a local level.

Unlocking tourism potential is likely to require strategies that go beyond traditional Tourism Master Plans and Strategies and that complement them, notably by including policy dimensions that fall within the arena of international trade and FDI, and by identifying action requirements at the national level, within the immediate business environment and at the firm level. To emphasize the international trade aspect of tourism, such strategies could be designed as TES and thus be strategies pursuing the explicit objective of integration in international markets. Given the significant importance of tourism for sustainable development, such comprehensive strategies deserve the full attention of the donor community.

3.1 Acting at the national and international level

Trade policies, investment and visa policies

The success of tourism as a driver of sustainable development in developing countries depends on policies and strategies for trade and investment that meet the sector’s needs, and an overall business environment that is conducive to growth.

As mentioned above, the provisions and commitments in the GATS are highly relevant for decision makers interested in implementing a TES. Box 2 illustrates how the four Modes of services supply affect providers of tourism and travel-related services. Special attention is drawn here to Mode 3 which concerns FDI.

The 2007 United Nations Centre for Trade and Development (UNCTAD) study, *FDI in Tourism*, found that tourism accounted for only 1-2% of total outward FDI stocks from the largest investment source countries in 2007, and was directed to only a small number of tourism-related activities, chiefly in hotels and restaurants. Moreover, in 2008, only an estimated 10% of tourism-related FDI was destined to developing and emerging economies. Commitments under Mode 3 may thus deserve particular attention from policymakers in developing countries if they are interested in unlocking the sectors development potential (Jansen, 2007).

Box 2. What makes international tourism international trade?

International trade is obviously much more than just containers of goods crossing international borders, and involves services as well. The GATS includes 'tourism and travel-related services': tourism commitments have been made by over 140 WTO members (with varying degrees of coverage), more than any other sector. Tourism and travel-related services include services provided by hotels and restaurants (including catering), travel agencies and tour operator services, tourist guide services, and other related services. Like other services sectors, tourism and travel-related services are overwhelmingly supplied by SMEs.

Tourism has four ways of being traded under the GATS, even if tourists crossing borders are the most common form of international trade in tourism services. Each of these four Modes of supply affects tourism and travel-related services:

Mode 1 – Cross-border supply: travel agents, hotels, and travel guides can be accessed electronically from importing countries.

Mode 2 – Consumption abroad: the mode of supply most typically associated with tourism.

Mode 3 – Commercial presence: chains of hotels and tour operators frequently set up hotels in multiple locations.

Mode 4 – Presence of natural persons: tour operators and hotels often employ foreign staff with skill sets that are not readily available in their country of operation.

Tourism-related expenditures are primarily considered to be Mode 2 services trade under the GATS, i.e. involving the non-resident customer consuming abroad in the country of the services supplier. Mode 2 is the most liberalized, figuring most prominently in the GATS commitments. Nevertheless, even if international tourists crossing borders is the most common and least restricted form of international trade in tourism services, the other three Modes of supply also have direct relevance for tourism.

Source: https://www.wto.org/english/docs_e/legal_e/26-gats.pdf

In addition, GATS commitments in services other than tourism and travel are also highly relevant for unlocking the potential of the sector. Commitments under financial services affect how easily tourists can access local currency or their domestic bank accounts when they wish to make purchases. Commitments under insurance services will affect where and how travel insurance is contracted.

The availability and quality of transport services is fundamental for the tourism sector. The GATS contains provisions and commitments for transport services, but important aspects of air transport are currently governed by bilateral or regional agreements rather than the GATS. The conditions determining market access of foreign carriers to national airports are typically defined through bilateral agreements.

WTO agreements relevant for the trade of goods, such as the General Agreement on Tariffs and Trade (GATT), the Agreement on Technical Barriers to Trade (TBT) or the Agreement on Sanitary and Phytosanitary Measures (SPS), can also be of relevance for the tourism sector. They regulate, for example, whether and how foreign vehicles can be imported, or whether hotels can be equipped with foreign materials.

One of the most significant constraint on incoming tourist numbers is costly or burdensome visa processes. UNWTO Tourism Visa Openness Report highlights the impact of visa facilitation schemes in boosting tourism demand. This is important because only 18% of the world's population can enter a destination without a visa and only another 15% can receive a visa on arrival.

Between 2010 and 2013, UNWTO identified regulatory reforms relating to visa requirements and processes in as many as 5,930 destination/source-market country pairs. As many as 44 destinations facilitated the visa process for citizens of 20 or more countries, by exchanging their visa policies from 'visa required' to either 'eVisa', 'visa on arrival' or 'no visa required'. Through this facilitation, in 2013 the percentage of the world's tourists still applying for a traditional visa prior to departure had dropped to 64%, a significant improvement from 77% at the beginning of 2008.

Brand, marketing and product positioning

For the tourism sector to be competitive, branding, marketing and product positioning are essential. The clarity of a country's destination brand and the coherence and execution of its marketing plan are vital to the competitiveness of the country's tourism sector. This raises awareness and attracts interest, as well as increases the length of stay and the level of visitors spending as well as boosting the number of returning visitors and recommendations received.

Defining and articulating a distinctive brand for the country is the key to effective marketing, providing the basis for promotional messages and guiding product development. The brand, which is far more than a logo or slogan, sums up the entire competitive identity of a destination, representing its core essence and enduring characteristics. Brand development should be based on consultation with local stakeholders and be informed by market research.

A well-developed marketing plan is a key component of a country's tourism strategy. It stems from the careful selection of target markets, based on product strengths, current performance and global trends. A well-resourced and coordinated programme of promotional activity is supported by both the government and the private sector, using a range of communication techniques.

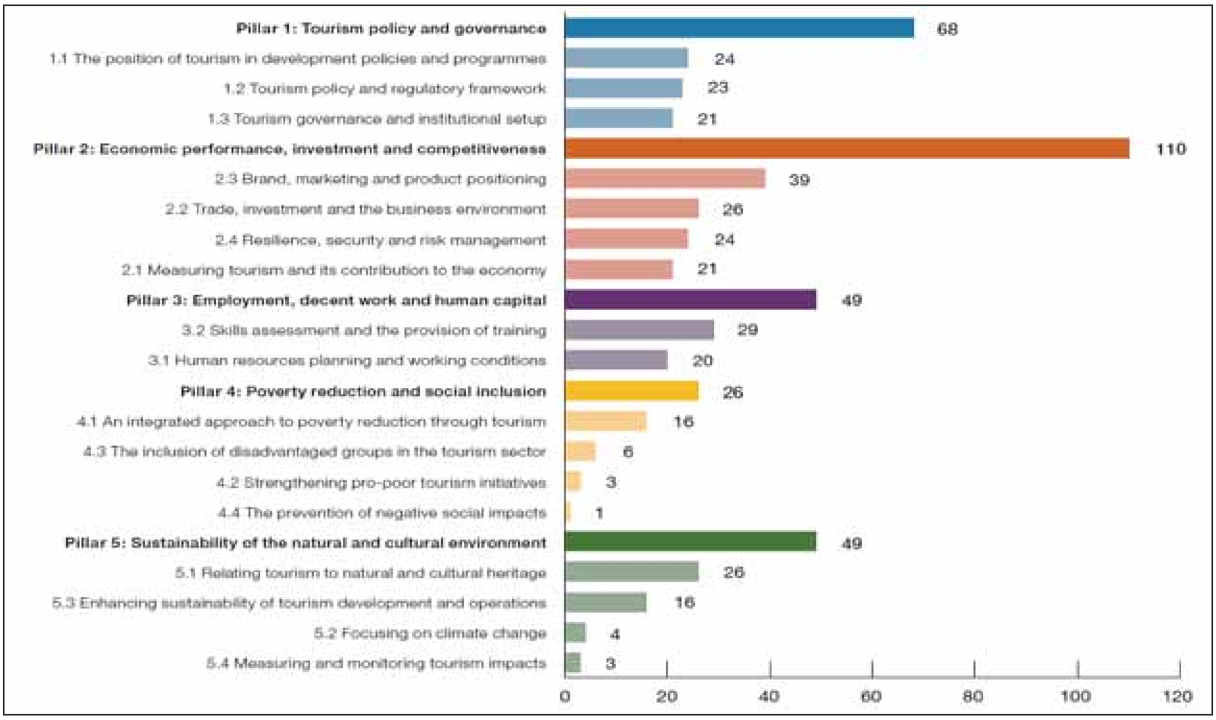
Tourism products must reflect the quality and variety attracting and retaining target markets. Many developing countries face inconsistency in product quality, which can affect competitiveness. This can be avoided by having effective systems in place for setting, inspecting, and reporting quality standards, such as hotel classification systems or tour guide standards and licensing. These systems in turn point to where investment is needed and encourage businesses to respond. Product development, innovation and diversification need to be fully informed by an understanding of market trends and current strengths and weaknesses of the existing products portfolio. This should link back to strategies and actions to guide and stimulate investment.

Box 3. Tourism: Key export sector for LDC development

For LDCs, a recent Enhanced Integrated Framework (EIF)-UNWTO study identifies key avenues for unlocking the potential of tourism through the Diagnostic Trade Integration Studies (DTIS). DTIS are conducted at the request of the LDCs, and encompass a review of the macroeconomic environment, regulatory and trade policies, the business climate and country competitiveness, with the objective of enhancing their participation in the multilateral trading system. The analysis is enriched by a focus on priority sectors for exports of goods and services, often including tourism.

DTIS tourism references articulate the key aspects. Coincidentally, issues pertaining to economic performance, investment and competitiveness are the most highlighted. Within this framework, brand, marketing and product positioning are overwhelmingly cited, followed by trade and investment policies and the business environment, providing a clear roadmap for action and support for trade-related technical assistance.

Figure 7. DTIS tourism references by UNWTO Tourism Development Sub-Pillars



Source: UNWTO-EIF 2015 desk research of 47 EIF Countries with a DTIS based on the UNWTO-EU/DEVCO tourism pillars.

Resilience and risk management

Developing countries face competition not only from each other, but also from developed countries and other forms of discretionary spending on leisure and recreation. This level of competition and market elasticity means that an individual destination can be very susceptible to external influences on markets.

The sector can be significantly affected by a variety of negative circumstances that may build up over time or be more sudden occurrences or shocks. These may be internal or external. Internal examples include economic instability, rising crime, local flooding, localized health scares or serious security incidents. External examples include global environmental events, pandemics, economic crises or incidents affecting major source markets. Occurrences involving tourists can have a particularly strong impact. Not only should such situations be avoided in their own right, they can also damage the brand. OECD, UNWTO, WTO (2013) report that ‘insecurity’ is the second most important determinant – after low quality business or regulatory environment – that affects investment decisions of suppliers in the tourism sector negatively.

A positive aspect of the sector is the tendency for demand to recover quickly from aftershocks and setbacks. However, it is very important that strategies are in place to build resilience, minimize risk and deal with crises.

3.2 Specialized institutions and the role of private stakeholders

The tourism sector, like other services sectors, is made up very largely of SMEs. To ensure inclusive tourism outcomes, it is important for governments to give voice to smaller stakeholders by establishing the right kinds of mechanisms, especially for business dialogue and consultation. In most countries, public, private or mixed public-private bodies exist to serve private sector stakeholders and assist them in providing inputs into the policy debate, but their effectiveness varies significantly.

For promoting tourism exports, relevant bodies could either have focus on tourism (e.g. Tourism Boards) or on trade (International chambers of commerce, Trade Promotion Organizations). Effective implementation of a TES requires the creation of bodies that deal both with tourism and trade, or alternatively, that tourism and trade-specific bodies communicate and collaborate with each other.

Coalitions of Services Industries (CSI) can also be important vehicles for representing tourism concerns in stakeholder consultation processes.[10] In some countries, SMEs in the tourism sector are the force behind industry efforts to champion the establishment of CSIs; this is currently the case in Tanzania. SMEs in the tourism sector are also central to the Saint Lucia CSI for example, which is working with its members and government agencies to deal with the impact on hoteliers and tour operators of erratic and seasonal demand by branding Saint Lucia as health and wellness destination all-year round.

3.3 The capacity of tourism service providers

The services provided by individual supplier products must be of the quality and variety that corresponds to the branding strategy of the country and also able to attract and retain tourists from the target markets. The services portfolio and its quality will very much depend on the capacity of individual service providers. This determinant is internal to the firm and thus under its control. World Economic Forum (WEF) (2008) refers to this determinant as to the sophistication of companies’ ‘operations and strategies’.

[10] ITC (2014). Creating Coalitions of Services Industries.

When asked about their main operational difficulties, providers of tourism services in developing countries ranked problems with the business environment and low labour skills as their main difficulties with 47% of respondents identifying these problems as their major constraint (OECD/UNWTO/WTO, 2013). Access to finance followed closely as third constraint.

The role of skills must be considered crucial in this people-centred sector. Personal interactions between individuals working in the tourism sector and travellers take place at all levels. One particularity of the tourism sector is that those interactions are particularly frequent for employees at the lower level of a company structure. Ensuring that those employees have the skills necessary to offer high quality services may play an important role in increasing the attractiveness of countries as tourist destinations (OECD, WTO and UNWTO, 2013; Jansen and Lanz, 2013).

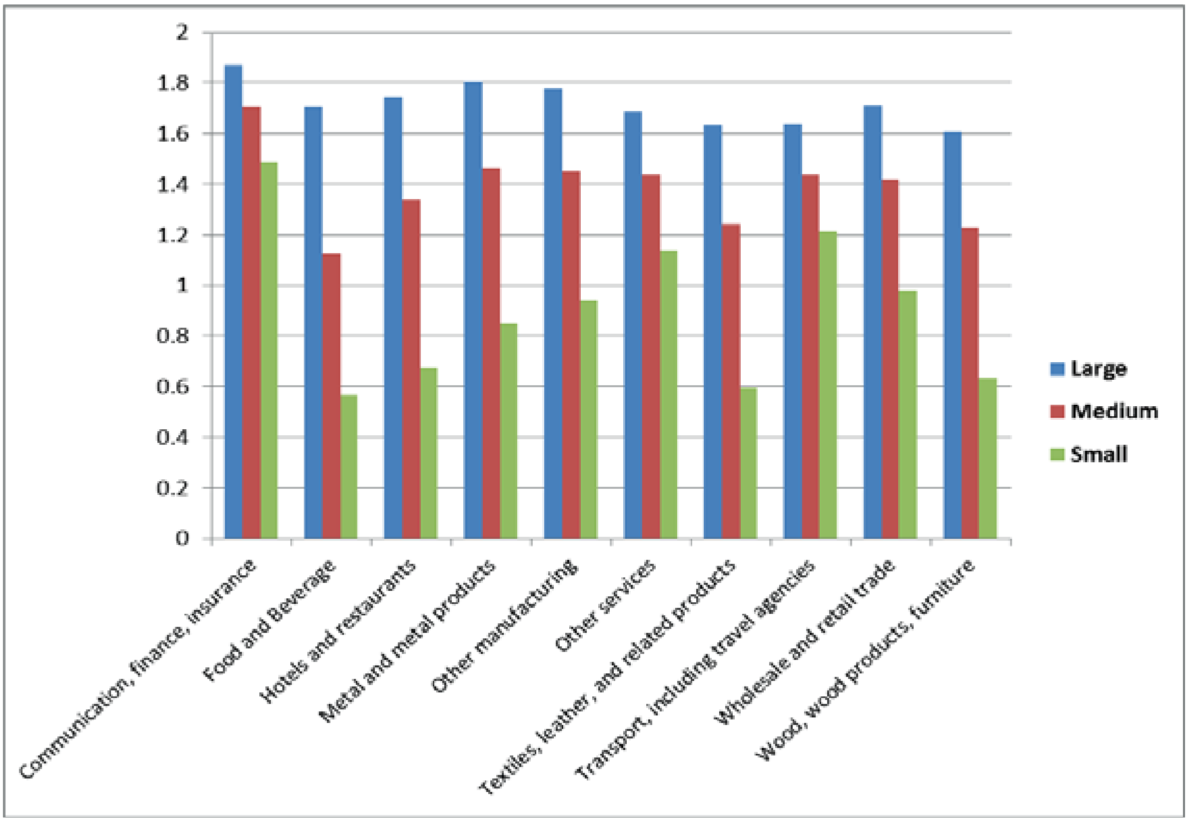
Another aspect that is increasingly important for international competitiveness is internet presence, notably determined by the ability of providers to reach out to customers via websites or email communication. ITC evidence based on World Bank (WB) Enterprise Survey data indicates that small firms make systematically less use of websites and emails than medium and large firms. The differences vary across sectors, with smaller firms being more prone to use emails and websites in the services sector. The important exception is the hotel and restaurant subsector, where small providers lag behind significantly on the use of these communication tools (Figure 8).

3.4 National Tourism Export Strategies

National TES complement Tourism Master Plans and Strategies by providing an export-oriented vision for the entire sector, taking into account all aspects of the tourism value chain to maximize the socio-economic benefits of international tourism: backwards and forwards and across all sectors of the economy. Such strategies would take a holistic approach and include whole-of-government inter-agency coordination and intensive stakeholder consultation processes, to maximize the socioeconomic benefits of international tourism.

Ideally, a TES represents an effective aggregation of existing and new tourism sub-sector strategies in which countries have market potential (e.g. sports tourism, health tourism, education tourism, cruise tourism etc.) grounded on sound value-chain diagnostics. In addition, a TES includes cross-cutting functional strategies that support the competitiveness of the tourism sector as a whole (e.g. finance, information, quality, promotion and branding).

Figure 8. Use of websites and emails by company size



Source: ITC calculations based on World Bank Enterprise Survey data

To ensure sustainability, a TES should put high priority on environmental and social dimensions and propose actions to mitigate negative impacts of tourism (e.g. undesirable infrastructure development, massification, social disruption, natural resource depletion and environmental damage).

A successful TES depends on high levels of institutional interaction, both from the tourism and the trade domains, thereby often engaging organizations that do not have a tourism focus in their primary activities, and a diverse range of private sector actors and operators. The TES process should set up PPD platforms that are ideally institutionalized and have endorsement at the highest political level, to ensure inclusive participation and commitment.

3.5 Strategizing requires measurement

Statistical information on tourism's multiple facets is pivotal in advancing knowledge of the sector, monitoring progress, promoting results-focused management, and highlighting strategic issues for policy decisions. A number of existing data collection exercises relevant for the tourism sector is presented in Box 4.

As part of an effort to boost the international comparability of tourism data in 2011 while engaging countries to consider a wider spectrum of oftentimes unavailable tourism data, UNWTO significantly expanded the amount of statistical data and indicators it requests from countries and compiles them in the Compendium of Tourism Statistics. The Compendium provides statistical data and indicators on inbound, outbound and domestic tourism, as well as on the number and types of tourism industries, the number of employees by tourism industries, and macroeconomic indicators related to international tourism.

As a complement to such information, UNWTO promotes the Tourism Satellite Account (TSA) as the most comprehensive way to measure the economic contribution of tourism. This involves the use of data from the demand side (the acquisition of goods and services while on a tourism trip) and from the supply side of the economy (the value of goods and services produced by industries in response to visitor expenditure).

TSA production is a sizeable undertaking, requiring considerable human and financial resources, justified by its value as a robust advocacy and planning tool. In countries or situations where resources are not available to develop a TSA, general capacity-building support could be provided to strengthen the system of national tourism statistics.

Box 4. Data collection exercises relevant for the tourism sector

Recent UNWTO publications to facilitate the collection of tourism statistics include (together with the International Labour Organization) *Measuring Employment in the Tourism Industries* and the *IRTS 2008 Compilation Guide*.

WEF compares the competitiveness of destination countries in travel and tourism using a set of 79 variables. These span a wide spectrum of factors, from the policy and regulatory environment to the accessibility and safety of the country, its infrastructure, as well as natural and cultural resources. The resulting index provides a valuable insight for developing countries in considering, monitoring and comparing their tourism competitiveness against each other and against developed economies. UNWTO is part of the WEF team preparing the Travel and Tourism (T&T) Competitiveness Report.

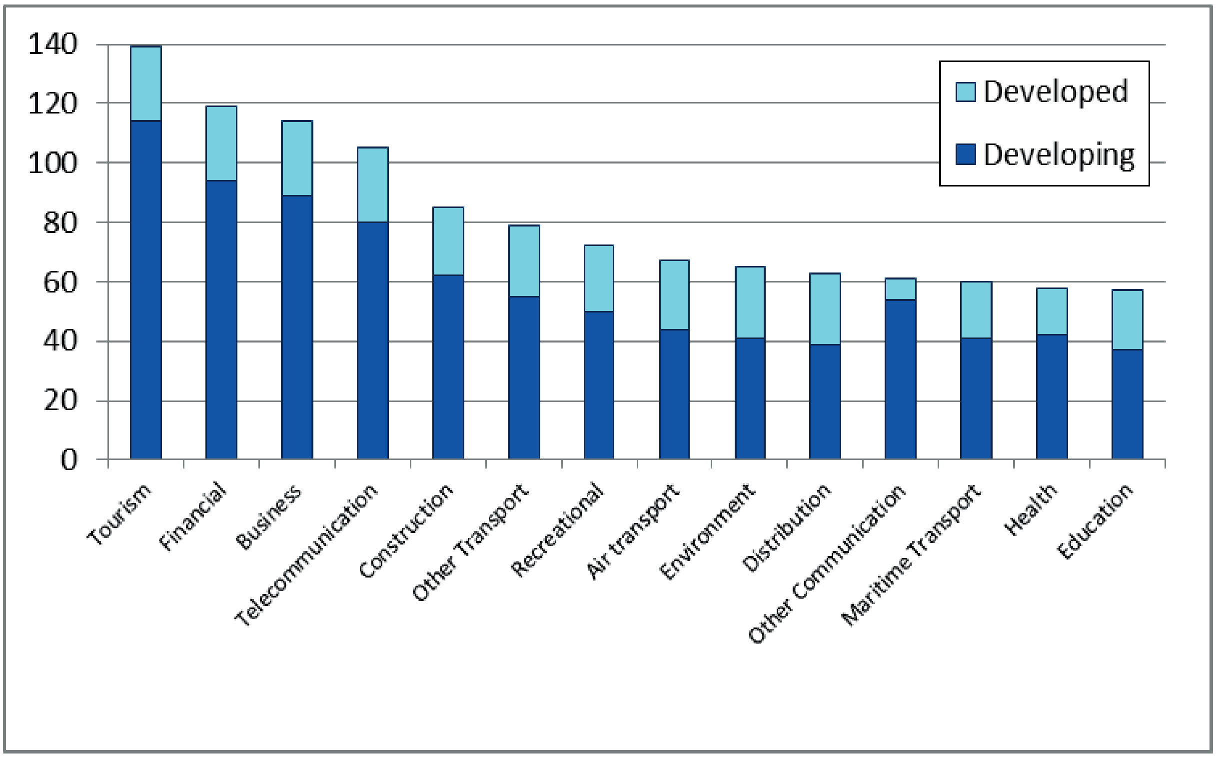
In the area of firm level capacity, ITC has started to gather and analyse data on SME competitiveness with a focus on firms' capacity to connect, compete and change (ITC, forthcoming).

4. Current commitments to unlocking tourism potential

4.1 Trade policy

Over 140 WTO members have made commitments in the tourism sector to liberalize foreign services and foreign services suppliers (with significantly varying degrees of coverage). This is a larger number of liberalization commitments than has been made under the GATS for any other services sub-sector. As Figure 9 shows, this is even more dramatically evident for developing countries.

Figure 9. Number of commitments under the GATS by services sub-sector



Source: WTO, as found in Honeck (2015)

After more than two decades of intense negotiation, LDC members of the WTO are also securing preferential access for their exports of services to the markets of both developed and developing country WTO members. Waivers to the Most Favoured Nation (MFN) principle already existed for the export of goods, where there were a number of preferential schemes benefitting LDCs. However, there was no provision for such a waiver in the 1995 GATS, essentially because members were uncertain how it could work.

In 2003, WTO members agreed on modalities, or a blueprint, for handling the special treatment of LDC members in the negotiations on trade in services. In 2011, a 15-year services waiver was agreed and has colloquially become known as the ‘LDC Services Waiver’. However, by the end of the first two years, no LDC had made use of the waiver. This led to the formation of the ‘LDC Collective

Request', containing specific requests that developing and developed countries could agree to. The result of the process was that 25 WTO members expressed 'signals' with respect to one or more of the requests (i.e. expressions of positive intent). Tourism and travel comprise 16% of all signals announced to date (see ITC's *Making the Most of the LDC Services Waiver 2015* publication).

On 9 March 2015, Canada became the first country to notify the WTO's Council for Trade in Services (CTS) on the sectors and modes of supply that it will grant preferential treatment to. However, Australia's notification three months later was the first to explicitly mention tourism, removing the commercial presence requirement for cross-border supply of travel agencies and tour operator services. Further recognizing the importance of tourism services for LDC suppliers, China announced supply-side assistance in infrastructure in the tourism sector, commitments to increase the number of their own tourists to LDCs, and simplified procedures for LDCs to apply for authorized destination.

An analysis of the summary of preferences notified or signalled reveals that 12 out of 21 members (or 39 out of 48 members if European Union countries are counted separately) explicitly mention the word 'tourism', or a derivation thereof, in their notifications to the CTS (ITC, 2015). However, even in the cases where tourism is not explicitly mentioned, tourism-related services signals are often found. Such cases most often apply to notifications around transport, logistics and entertainment, which are crucial to a competitive tourism sector, and together comprise 35% of all signals announced to date. For example, New Zealand does not explicitly mention tourism in its notification to the CTS, but includes signals related to cargo and baggage handling services in relation to air transportation services, with full commitments in Mode 1, 2 and 3 (Table 2). Such commitments can be highly relevant for the tourism sector when analysed from a value chain perspective.

In their notifications to the CTS, some members signalled capacity-building measures. For instance, in relation to the LDC waiver, Australia announced two new development activities in the Indo-Pacific region (totalling AUD$ 2.5 million) to assist LDCs identify services potential and maximize services trade capacity. In these and other areas, ITC is ideally placed to assist LDCs with technical support, capacity building and market analyses. To give a practical example, in the framework of the 'Netherlands Trust Fund III Myanmar Inclusive Tourism project', sponsored by the Centre for the Promotion of Imports from developing countries (CBI), ITC is increasing export marketing capacities of selected tour operators by organizing and delivering export promotion training.

Table 2. Selected offers under the LDC Services Waiver: a tourism value chain perspective

Member Country	Preferential measures under the LDC Services Waiver
Australia	✓ Removed commercial presence requirement for cross-border supply of travel agencies and tour operator services.
Norway	✓ Removed requirement on established road passenger transportation entities to use vehicles with national registration (National Treatment).
Republic of Korea	✓ Removed the restriction that only travel agencies are allowed to supply tourist guide services. ✓ Added entertainment services, with full commitments in Mode 2 and 3.
China	✓ Assistance in construction of tourism-related infrastructures. ✓ Facilitate LDCs to acquire Authorized Destination Status. ✓ Provide training programs on tourism services.
Hong Kong China	✓ Added "other lodging services" to hotel services, with full commitment in Mode 2 and 3. ✓ Added entertainment services, with full commitments in Mode 2 and 3.
New Zealand	✓ Added cargo and baggage handling services in relation to air transportation services with full commitments in Mode 1, 2 and 3.
Japan	✓ Added full Mode 1 commitment in tourist guide services. ✓ Added full Mode 1 commitment in hotel and restaurant services. ✓ Added road and rail passenger transportation services with full commitments in Mode 2 and potential restriction in Mode 3 for road transportation.

Source: ITC based on the notifications submitted by the 11 WTO members under the LDC services waiver.
Note*: New tourism and tourism-related commitments (including tourism, hotel and restaurant, passenger transportation, entertainment) extracted from the notifications submitted by the 11 WTO members under the LDC services waiver.*

4.2 International assistance to tourism

Tourism is a high-impact economic activity in trade in services, a major job generator and a priority area for a large number of developing countries. Yet, financing remains an important hurdle for tourism to really deploy its development potential. The sector is still clearly underrepresented in aid flows, accounting only 0.09% of Official Development Assistance (ODA) and 0.78% of Aft in tourism in 2013[11].

ODA is defined as those flows to countries and territories on the Development Assistance Committee (DAC) List of ODA Recipients[12] and to multilateral development institutions which are: 1) provided by official agencies, including state and local governments, or by their executive agencies; and 2) each transaction of which: a) is administered with the promotion of the economic development and welfare

[11] 'Tourism Driving Trade, Fostering Development and Connecting People', UNWTO, 2015.
[12] www.oecd.org/dac/stats/daclist

of developing countries as its main objective; and b) is concessional in character and conveys a grant element of at least 25% (calculated at a rate of discount of 10%)[13].

AfT is part of ODA and refers to those flows aiming to support countries' efforts to develop and expand their trade as leverage for growth and poverty reduction. It encourages developing countries, and particularly LDCs, governments and donors to recognize the role that trade can play in development.[14]

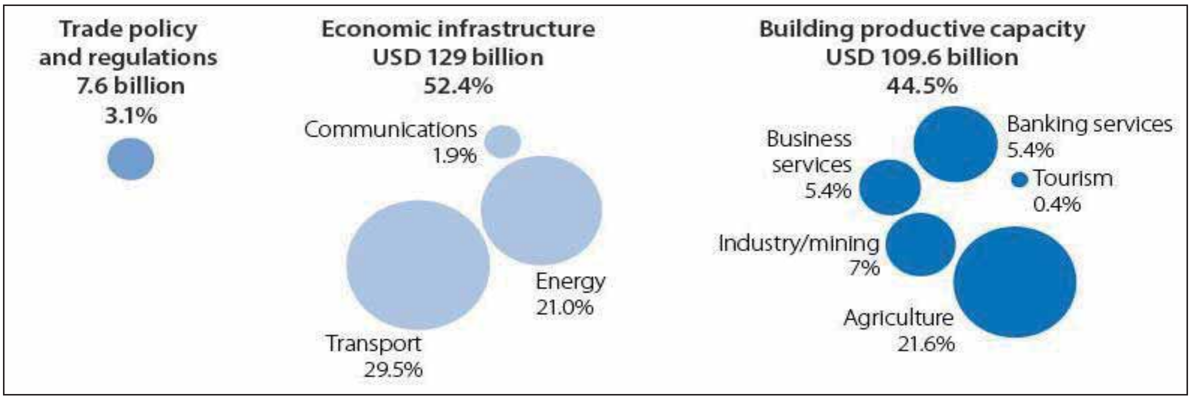
In 2006, the Task Force on Aid for Trade has determined that AfT comprises the following categories[15]. Tourism, as trade in services, is fully eligible under each category of AfT:

- **Technical assistance for trade policy and regulations** (e.g. helping countries to develop trade strategies, negotiate trade agreements, and implement their outcomes);
- **Trade-related infrastructure** (e.g. building roads, ports, and telecommunications networks to connect domestic markets to the global economy);
- **Productive capacity building**, including trade development (e.g. supporting the private sector to exploit their comparative advantages and diversify their exports, agriculture, industry, tourism);
- **Trade-related adjustment** (e.g. helping developing countries with the costs associated with trade liberalization, such as tariff reductions, preference erosion, or declining terms of trade);
- **Other trade-related needs**, if identified as trade-related development priorities in partner countries' national development strategies.

According to data from the OECD Creditor Reporting System (CRS)[16] on commitments and disbursement of ODA, total AfT disbursements to the tourism sector were around 160% higher in 2011 than in 2006. This increase however, was from an extremely low base, with disbursements to tourism still less than 0.5% of total AfT disbursements in 2011. As highlighted in Figure 10, only 0.4% of total AfT flows were directed to tourism development over the period 2006-2013. Considering that tourism constituted on average around 4% of GDP in LICs (less than half the global average) there can be no doubt that tourism is highly under-represented in AfT flows[17].

[13] Factsheet: 'Is it ODA?', OECD, November 2008, http://www.oecd.org/dac/stats/34086975.pdf
[14] https://www.wto.org/english/tratop_e/devel_e/a4t_e/aid4trade_e.htm
[15] Report of the Task Force on Aid for Trade to the WTO General Council on 27 July 2006.
[16] The CRS is based on regular reporting by members of the OECD Development Assistance Committee and other providers of development co-operation, based on approved policy guidelines. The OECD collects, collates, and verifies the consistency of the data, and maintains the database.
[17] 'Aid for Trade and Value Chains in Tourism', WTO-OECD-UNWTO, 2013.

Figure 10. Total AfT Disbursements shares by category, 2006-2013



Source: OECD-DAC / CSR aid activity database[18]

Of course, some components of AfT flows to economic infrastructure are likely to have relevance for tourism, agriculture and other sectors. This is to be expected, for example, for aid flows to transport infrastructure, given the role that the availability and quality of infrastructure has for inbound travel and for travel within countries. With as much as 30% of AfT expenditure on economic infrastructure directed towards improving transport and storage, it is realistic to assume that a proportion of this will have pay-offs for the tourism sector[19]. Thus, it is essential that the tourism sector be fully included in decision-making for such infrastructural projects.

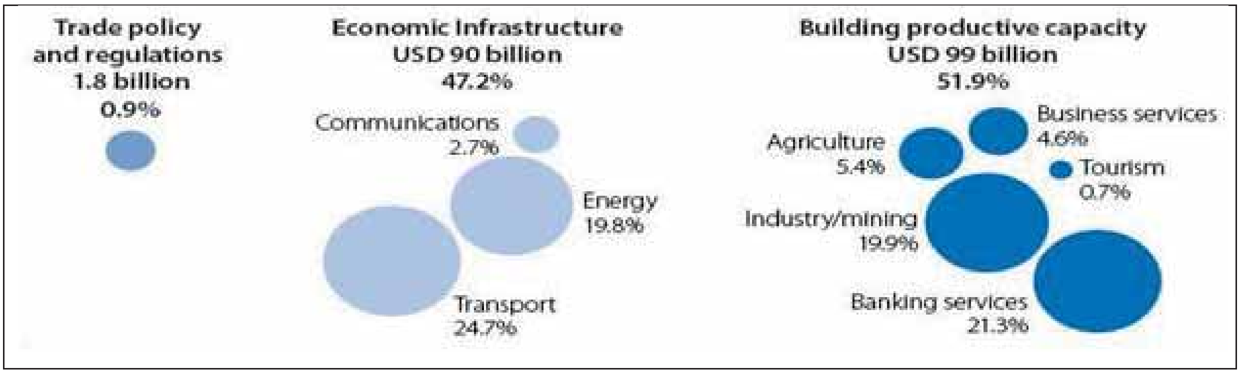
Under current structures, in which many different institutions are responsible for trade, tourism, transport and infrastructure, sufficient coordination efforts do not always take place regarding the allocation of ODA; this may result in missed opportunities when it comes to leveraging its development impact[20]. It is evident that digital infrastructure for example – crucial to all services industries and certainly to tourism – receives less than 2% of the total ODA economic infrastructure spend.

Furthermore, the private sector engagement and involvement is still weak in many countries, though AfT is an important vehicle to help the private sector in developing countries improve its trade capacity and to benefit from global markets and thus contribute to economic growth and job creation[21].

The story is not very different for trade-related Other Official Flows (OOF). While in 2013 another US$ 339 billion has been committed in real terms since 2006 and US$ 203 billion disbursed, Figure 11 shows disbursement to tourism still well under 1% of the total in 2013.

[18] 'Aid For Trade At A Glance 2015: Reducing Trade Costs For Inclusive, Sustainable Growth', OECD, WTO 2015.
[19] idem
[20] idem
[21] 'Focusing on what matters in Aid-for-Trade: Increasing effectiveness and delivering results', ODI Briefing Paper 79 (January 2013). Available from: http://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/8194.pdf

Figure 11. Aggregate trade-related OOF disbursements, 2002-2013



Source: OECD-DAC / CSR aid activity database[22]

In absolute terms, AfT disbursements for tourism increased to all regions over the period 2006-2011. In relative terms, however, the allocation of disbursements saw a reversal of the weight of the Americas (in particular North and Central America) and the weight of Africa. In 2006, the Americas received more than one-third of all AfT funds for tourism, while Africa received around one fifth. These relative weights were reversed by 2011. Shares for Asia experienced only a small overall decline to 20% from 23%. Other regions varied: the share for Europe dropped from a high of 18% in 2007 to less than 5% in 2011; by 2010 the Middle East was receiving almost 18%, but by 2011 this dropped back to 8.4%; and Oceania received 8% in 2011[23], a large increase from 4.3% in 2010.[24]

With respect to the OECD DAC country groupings by income, the largest share of tourism AfT has been flowing to UMICs. As shown in Table 3, this share continues moreover to grow, from 37% of AfT for tourism in 2006 and 45% in 2011. AfT for tourism to LDCs has also increased, much faster from a share of 12% to 22%. An ongoing joint study[25] of UNWTO and EIF shows that for the 2011-2015 period, the total EIF commitments for tourism allocated to LDCs was US$ 8.6 million by 2014, equivalent to 9% of the Tier 2 project portfolio. The share received by LMICs has declined by 20%.

As the DAC income groupings differ significantly in terms of number of countries included, it is worth looking also at average disbursements per country in the different income groups. Table 4 shows that over the period 2006-2008 average tourism spending per country was by far the lowest for the LDCs with the picture shifting significantly in recent years[26].

[22] "Aid For Trade At A Glance 2015: Reducing Trade Costs For Inclusive, Sustainable Growth" OECD, WTO 2015
[23] idem
[24] OECD/UNWTO/WTO (2013)
[25] Foreseen date of release: November 2015
[26] "Aid for Trade and Value Chains in Tourism", WTO-OECD-UNWTO, 2013

Table 3. AfT tourism disbursements per DAC income group (US$ thousand)

Group	Sum of disbursements		Percentage of disbursements	
	2006	**2011**	**2006**	**2011**
LDCs	6975	34300	12%	22%
LMICs	17700	37128	30%	24%
MADCTs	443		1%	
Other LICs	5367	2195	9%	1%
Part I unallocated by income	6169	11696	11%	8%
UMICs	21604	68710	37%	45%
Total	58259	154029	100%	100%

Source: OECD/UNWTO/WTO (2013)

Table 4. Average per country AfT tourism disbursement by income groups (US$ thousand)

	2006	**2007**	**2008**	**2009**	**2010**	**2011**
LDCs	142	181	197	267	993	700
Other LICs	1073	606	673	252	548	439
LMICs	443	511	701	824	1186	928
UMICs	400	537	777	1011	888	1272

Source: OECD/UNWTO/WTO (2013)[27]

Of the 30 top individual recipient countries over this period, only six are LDCs; Yemen, the Lao People's Democratic Republic, the United Republic of Tanzania, Cambodia, Bhutan, and Nepal. Table 3 shows Tunisia was by far the largest recipient of AfT for tourism, followed by Yemen, Sri Lanka, Viet Nam, and the Lao People's Democratic Republic.

Table 5. AfT tourism disbursements to main recipients, 2006-2011 (US$ million)

Rank	Country	Disbursements 2006-11	Rank	Country	Disbursements 2006-11
1	Tunisia	68.2	16	Dominica	11.2
2	Yemen	30.9	17	Bolivia	10.1
3	Sri Lanka	25.1	18	Indonesia	9.0
4	Vietnam	22.0	19	Bosnia-Herzegovina	8.4
5	Laos	19.3	20	El Salvador	8.3
6	Jordan	18.6	21	Dominican Republic	7.9
7	Honduras	17.8	22	Ecuador	7.7
8	Montenegro	17.5	23	Cambodia	7.3
9	Nicaragua	17.1	24	India	6.7
10	Montserrat	17.0	25	Bhutan	6.6
11	Namibia	17.0	26	Lebanon	6.1
12	Kenya	14.1	27	Morocco	5.9
13	Egypt	12.8	28	Nepal	5.9
14	Peru	12.7	29	China	5.8
15	Tanzania	12.1	30	Guatemala	5.8

Source: OECD/UNWTO/WTO (2013)

[27] idem

Average spending per tourism project is small compared with project size in other sectors, but has increased somewhat over time, from an average of around US$ 300,000 in 2006 to around US$ 500,000 in 2011. The number of tourism projects financed each year increased by 38% in 2008, from 222 to 306, and the number has since remained roughly steady, at just over 300[28].

The preliminary results of the aforementioned EIF-UNWTO joint-study show that 42 EIF countries out of 47 (having a DTIS) – including 38 LDCs – have identified tourism as a key sector in their Diagnostic Trade Integration Studies (EIF and UNWTO, forthcoming). However, and in spite of this impressive figure, the number of tourism projects in LDCs financed by the EIF is not proportional; currently, there are projects being implemented in Vanuatu, Sierra Leone, Solomon Islands, Cambodia, Burundi, and Liberia. Interesting to note that for Vanuatu, the EIF work through the prioritization in the DTIS has enabled the country leverage additional funding for tourism infrastructure from New Zealand.

Box 5. Vanuatu EIF Tier 2 Tourism Project on Infrastructure

EIF Budget: US$ 3,150,000

New Zealand: US$ 15,650,000

Aim: to transform the seafront into a functional, safe and attractive area. **Resilience to natural disasters and climate change will be improved**.

The direct beneficiaries will be people, business and traders. In particular **women**: about 11,000 of them are estimated to be working in the handicraft sector.

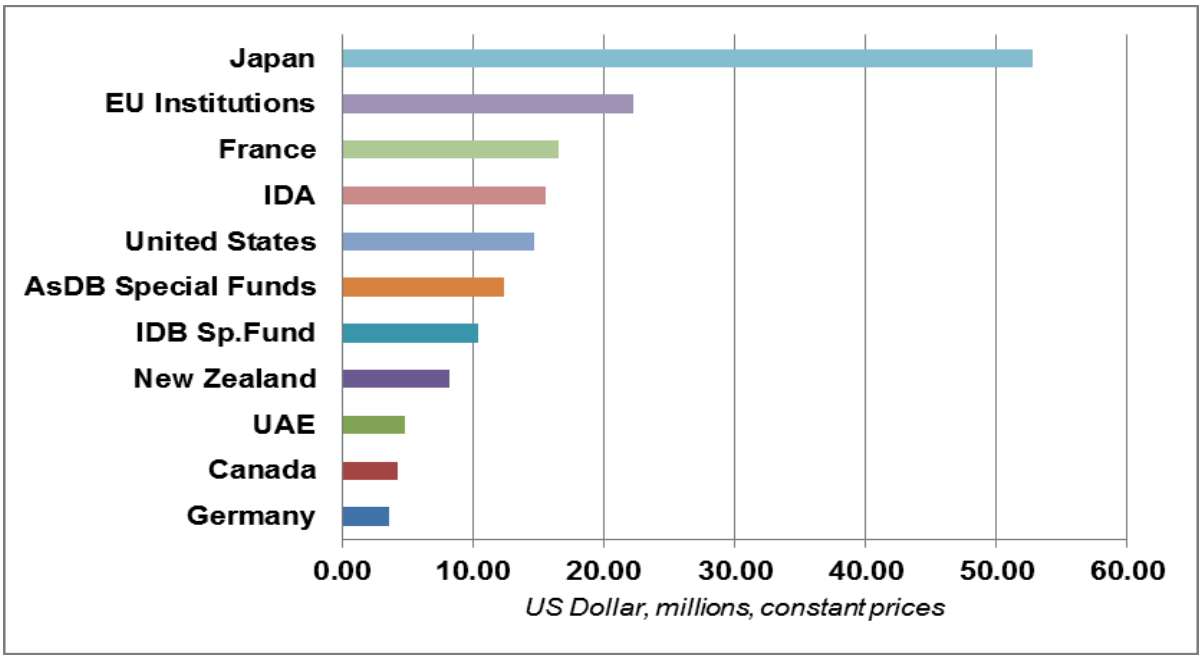
Source: EIF-UNWTO (2015)

The donor countries allocating the highest amounts of ODA funding to tourism over the period 2009-2012 include Japan, France, Germany, New Zealand, and the United States of America.

In 2013, the trend was maintained with Japan being by far the largest bilateral donor (US$ 52.78 million), followed by France (US$ 16.54 million); in terms of multilateral ODA, the major donors were the EU Institutions and the International Development Association (IDA), US$ 22.29 million and US$ 15.519 million, respectively (as represented in Figure 12).

[28] "Aid for Trade and Value Chains in Tourism", WTO-OECD-UNWTO, 2013

Figure 12. Main donors of tourism-related ODA disbursements, 2013



Source: UNWTO based on OECD.STAT – CRS (accessed September 2015)

The donors featured in Figure 12 were also the major donors of total ODA for the same year. Table 6 shows how much they have spent in ODA and how much was dedicated to tourism. Interesting enough, the percentage of the total ODA flows allocated to tourism is equivalent to the overall values mentioned in the beginning of this section, i.e., very low.

Table 6. Major donors in 2013, total ODA and tourism (gross disbursements, constant prices)

Donor	**Total ODA** (US Dollar, millions)	**Tourism** (US Dollar, millions)	**Share of total ODA allocated to tourism**
Canada	3,554.35	4.30	0.12%
France	8,308.50	16.54	0.20%
Germany	11,443.70	3.62	0.03%
Japan	19,556.83	52.78	0.27%
New Zealand	352.85	8.23	2.33%
United States	27,266.46	14.72	0.05%
AsDB Special Funds	2,695.93	12.33	0.46%
EU Institutions	17,243.12	22.29	0.13%
IDA	12,307.45	15.51	0.13%
IDB Sp.Fund	2,169.14	10.42	0.48%
UAE	5,472.41	4.85	0.09%

Source: UNWTO based on OECD.STAT – CRS (accessed September 2015)

More support through the allocation of ODA and AfT could have significant paybacks for beneficiary countries. This need for scaling up aid flows in tourism becomes even more pertinent considering that in the coming years the emerging economies will overtake advanced economies as preferred destinations for more than half of international tourists travelling the world. Not seizing this potential could mean to miss out in terms of global opportunities for sustainable development[29].

Tourism's role is steadily becoming recognized at key political fora and among the world´s decision makers with the sector gaining momentum in both the trade and the development agenda. In 2015, The Addis Ababa Action Agenda of the Third International Conference on Financing for Development[30] includes paragraph that promotes the development and implementation of 'tools to mainstream sustainable development, as well as to monitor sustainable development impacts for different economic activities, including for sustainable tourism'.[31]

[29] 'Tourism Driving Trade, Fostering Development and Connecting People', UNWTO, 2015.
[30] Addis Ababa Action Agenda of the Third International Conference on Financing for Development, Resolution 69/313 adopted by the General Assembly on 27 July 2015.
[31] 129. 'We further call upon the United Nations system, in consultation with the international financial institutions, to develop transparent measurements of progress on sustainable development that go beyond per capita income, building on existing initiatives as appropriate. These should recognize poverty in all of its forms and dimensions and the social, economic and environmental dimensions of domestic output and structural gaps at all levels. We will seek to develop and implement tools to mainstream sustainable development, as well as to monitor sustainable development impacts for different economic activities, including for sustainable tourism.'

5. Joining forces to unlock tourism: ITC and UNWTO

ITC and UNWTO have entered a strategic partnership to aggregate the two organizations' resources and competencies, share perspectives in the process of rethinking a joint approach to AfT in tourism, and generate greater donor interest in funding tourism activities. The partnership also aims at having a more integrated and innovative approach of tourism development for inclusive growth, leading to the achievement of all dimensions of sustainable development for developed countries.

ITC brings to this partnership its trade orientation and mandate to work with the private sector, especially in regard to SME internationalization. This complements UNWTO's leadership and support to the tourism sector in advancing sustainable policies, practices and actions as the specialized agency for tourism in the UN. Through carefully designed and nurtured private-sector partnerships, ITC and UNWTO bring in and share the expertise of international leaders, academics and private sector companies involved in sustainable tourism.

UNWTO endeavours to maximize tourism's contribution to socio-economic growth, job creation, development, environmental conservation, cultural enrichment and international understanding, while minimizing negative social or environmental impacts with special attention to the developing countries. Fostering competitiveness and sustainability are at the core of UNWTO's work.

ITC offers technical assistance support customized to selected export sectors – including tourism – as well to policymakers, trade promotion organizations and SMEs. More specifically, ITC has longstanding experience in export strategy design and building sector competitiveness with a focus on inclusion and retention of local value added. Often, this work builds on value chain approaches.
ITC's area of expertise also includes building mechanisms for inter-government agency coordination, stakeholder advocacy for regulatory reform, and the reinforcement of trade and investment support institutions relevant for the targeted sector.

Last but not least, ITC provides direct support to SMEs. In the case of tourism, this involves enhancing the understanding and leveraging of competitiveness drivers in areas such as quality, food safety and conservation, and assistance in the design and implementation of effective strategies including direct marketing.

Most critical to ITC and UNWTO's joint approach is building market-led holistic approaches to boost tourism SME competitiveness. Improved participation in high value-added tasks in the tourism value chain is facilitated by consolidating ITC and UNWTO's know-how and methodologies. The approach takes into account backward linkages from the inbound tourist market into local production of agro-food, artisanal products and creative industries as well as into services sectors such as energy and environmental services, professional and business services, information and communication technology and financial services, and transportation.

ITC and UNWTO work closely with WTO as well as other leading agencies through the UN Steering Committee on Tourism for Development (SCTD),[32] a cluster approach to 'Delivering as One for Tourism'. The partnership brings together ten UN agencies committed to mainstreaming tourism in the global trade and development agenda. Within a multi-agency mechanism, all agencies strive to work in an integrated way with a range of complementary technical expertise spread across the member agencies. Only through concerted collaborative implementation the new whole-of-government paradigm can be realized.

The new strategic partnership between ITC and UNWTO will further strengthen the already existing collaboration between the two agencies and represents a further stepping stone in maximizing tourism's contribution to the 2030 Agenda for Sustainable Development as a critical sector of global services trade. It also represents an immense opportunity to promote inclusive development and social transformation for all.

[32] SCTD includes the International Labour organization (ILO), ITC, UNCTAD, United Nations Development Programme (UNDP), United Nations Environment Programme (UNEP), United Nations Educational, Scientific, and Cultural Organization (UNESCO), United Nations Industrial Organization (UNIDO), UN Women, UNWTO and WTO. More information is available at http://icr.unwto.org/sctd.

References

Honeck, D. (2015). Key Sectoral Rules and Negotiations. Presentation delivered at LDC Services Geneva Practitioners Seminar "Making Sense of the GATS and Applying Good practices in Services Negotiations". Available from: http://www.intracen.org/uploadedFiles/intracenorg/Content/Exporters/Sectors/Service_exports/Trade_in_services/Seminar%203_DALE%20HONECK.pdf

Honeck, D. (2012). LDC Export Diversification, Employment Generation and the "Green Economy": What roles for tourism linkages? WTO: Geneva. Available from: https://www.wto.org/english/res_e/reser_e/ersd201224_e.htm

ILO/UNWTO (2014). Measuring Employment in the Tourism Industries – Guide with Best Practices. UNWTO: Madrid.

ITC (2014). Creating Coalitions of Services Industries. ITC: Geneva.

ITC (2015). Making the Most of the LDC Services Waiver. ITC: Geneva.

Jansen, M. (2007). Services Liberalization at the Regional Level: Does Southern and Eastern Africa Stand to Gain from Economic Partnership Agreements. *Journal of World Trade* 41,2: 411-450.

Jansen, M. and Lanz, R. (2013). Skills and Export Competitiveness for Small and Medium-Sized Enterprises, WTO: Geneva.

Lejárraga, I. and Walkenhorst, P. (2010). On linkages and leakages: measuring the secondary effects of tourism. *Applied Economics Letters* 17, 5.

OECD. Creditor Reporting System. OECD.*stat*. Available from : https://stats.oecd.org/Index.aspx?DataSetCode=CRS1

OECD/WTO (2015). Aid for Trade at a Glance 2015: Reducing Trade Costs for Inclusive, Sustainable Growth. OECD Publishing, Paris. Available from: http://www.oecd-ilibrary.org/development/aid-for-trade-at-a-glance-2015_aid_glance-2015-en

OECD/UNWTO/WTO (2013). Aid for Trade and Value Chains in Tourism. Available from: https://www.wto.org/english/tratop_e/devel_e/a4t_e/global_review13prog_e/tourism_28june.pdf

Rio+20 (30 June 2012). The Future We Want. Available from: http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/docpdf/rio20outcomedocument.pdf

EIF/UNWTO (2015) Tourism in the Aid for Trade (AfT) Agenda – Maximizing the Opportunities for Financing with the Enhanced Integrated Framework for Least Developed Countries. http://www.e-unwto.org/doi/book/10.18111/9789284417124

UN (2015). Transforming Our World: The 2013 Agenda for Sustainable Development. Available from : https://sustainabledevelopment.un.org/content/documents/7891TRANSFORMING%20OUR%20WORLD.pdf

UNCTAD (2007). FDI in tourism: The Development Dimension. United Nations: Geneva.

UNEP/UNWTO (2005). Making Tourism More Sustainable, A Guide for Policy Makers. UNEP/UNWTO. Available from: http://www.unep.fr/shared/publications/pdf/DTIx0592xPA-TourismPolicyEN.pdf

UNWTO (2013). Sustainable Tourism for Development. UNWTO: Madrid. Available from: http://sdt.unwto.org/content/10yfp-sustainable-tourism-programme

UNWTO (2015). Tourism Highlights, 2015 edition. Available from: http://www.e-unwto.org/doi/pdf/10.18111/9789284416899

UNWTO (2011). Tourism Towards 2030, Global overview. Available from: http://media.unwto.org/sites/all/files/pdf/unwto_2030_ga_2011_korea.pdf

UNWTO (2013). Tourism Visa Openness Report. Available from : http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/docpdf/tourismvisaopennessreport23august20132.pdf

UNWTO (2005-2007). Understanding Tourism: Basic Glossary. Available from: http://sdt.unwto.org/content/10yfp-sustainable-tourism-programme
http://media.unwto.org/en/content/understanding-tourism-basic-glossary

UNWTO (2014). World Tourism Barometer. Available from: http://mkt.unwto.org/en/barometer

UNWTO-EU/DEVCO (2013). Sustainable Tourism for Development Guidebook, Enhancing capacities for Sustainable Tourism for development in developing countries. UNWTO: Madrid.

World Bank. Enterprise Survey database. Available from: http://data.worldbank.org/data-catalog/enterprise-surveys

WTO (1994). General Agreement on Trade in Services. Available from: https://www.wto.org/english/docs_e/legal_e/26-gats.pdf

WTO (2014). World Trade Report 2014. Available from: https://www.wto.org/english/res_e/booksp_e/world_trade_report14_e.pdf

FSC

FSC is an independent, non-governmental, not for profit organization established to promote the responsible management of the world´s forests.

Printed by ITC Digital Printing Service on FSC paper, which is environmentally-friendly paper (without chlorine) using vegetable-based inks. The printed matter is recyclable.

A free pdf is available on ITC's website at: www.intracen.org/publications.

International Trade Centre

Street address
International Trade Centre
54-56 Rue de Montbrillant
1202 Geneva, Switzerland

P: +41 22 730 0111
F: +41 22 733 4439
E: itcreg@intracen.org
www.intracen.org

Postal address
International Trade Centre
Palais des Nations
1211 Geneva 10, Switzerland