

Chapter 3. Promoting a green tourism recovery

Significant progress has been made to better understand tourism's impacts on the natural environment, and to mainstream the concept of sustainability in tourism policy. However, more needs to be done, and with a greater sense of urgency, to accelerate the transition to a greener tourism economy, to translate commitments into real actions and outcomes, and to embed environmental objectives into tourism policies. This chapter examines policy approaches to support the tourism recovery in a green and environmentally sustainable way, while delivering benefits to local communities and economies. It highlights key policy considerations to promote the transition to greener business models and destinations needed to transform the tourism system, and to deliver sustainable outcomes for the long-term.

Tourism has a complex relationship with the environment as, more than many other sectors, it both impacts and is highly dependent on the quality of the environment. Significant progress has been made in recent decades to better understand the impacts of tourism on the natural environment and host societies, and to mainstream the concept of sustainability in tourism policy. This requires adaptation to climate and other changes to be addressed alongside actions to mitigate and reduce the environmental impacts from tourism, while supporting the well-being of communities. However, more needs to be done, and with a greater sense of urgency, to accelerate the transition to a greener tourism economy, to translate commitments into real actions and outcomes, and to embed environmental objectives into tourism policies.

The COVID-19 pandemic has led to a greater awareness of these issues, providing an enhanced incentive and opportunity to tackle them, throughout the tourism ecosystem. The disruption creates significant opportunities to reimagine the tourism sector, fast track the move to greener, more sustainable models of tourism development through innovative policies, and ensure recovery plans are aligned with the Paris Agreement and the Sustainable Development Goals (SDGs). With Russia's war in Ukraine putting additional upward pressure on prices, this may provide a further boost to accelerate transitions to net-zero, as economies reprioritise energy security and businesses shift to more resource-efficient practices.

The window of opportunity is closing to integrate green measures in tourism recovery plans, and ensure the green transition does not get side-tracked by a demand-driven tourism rebound. Urgent action is needed to address the existential threat of climate change, target reduced carbon emissions and pollution, enhance energy and resource efficiency, and prevent the loss of biodiversity and ecosystems from tourism activities. This requires active tourism policies and recovery measures to drive the transition to greener tourism business models and value chains, and improve the environmental outcomes for destinations, while delivering benefits to local economies and communities. Key areas of focus should include:

- **Decarbonisation:** advance sustainable production and consumption by increasing energy efficiency, promoting circular economy models, and reducing tourism's greenhouse gas emissions (GHG), to reach net-zero by 2050.
- **Climate change adaptation:** build tourism resilience to respond to and prepare for climatic hazards and related environmental and socio-economic impacts.
- **Ecosystem restoration:** halt and reverse, where possible, the decline in biodiversity and destruction of fragile habitats, and actively contribute to improving the health of ecological systems.
- **Inclusiveness:** improve equality, and empowerment of individuals, communities, and cultures in line with the SDGs.

Prior to the pandemic, tourism development was economically, socially and environmentally unbalanced in many countries and destinations, often due to rapid and unplanned growth in visitor numbers. Tourism now has an opportunity to build a wider policy momentum to drive the transition to greener tourism business models, as well as promote greening along the tourism value chain involving a wide range of up and downstream processes and actors. Major shifts are necessary for businesses of all sizes in all parts of the tourism ecosystem, such as the shift from a linear to a circular economy which aims to generate a sustainable economic system by fundamentally reducing resource consumption and waste, and decoupling natural resource extraction from the growth of economic activity and well-being (OECD, 2021^[1]) (UNEP and World Bank, 2021^[2]).

The chapter begins by outlining the urgent need for accelerated action towards green recovery, followed by an assessment of how governments can support greener business models and destinations. Innovative policy approaches are discussed, focusing on several key levers, as well as policy options to assist those involved in the tourism value chain to make a meaningful and lasting contribution to the green transition. The chapter closes by emphasising that the green transition, including building resilience to multiple crises, needs to be embedded across all aspects of tourism recovery and in strategies for the future.

Accelerating the transition to a green tourism economy

The next ten years will be pivotal for addressing both the existential threat of climate change and the ecosystem crisis, as any further delay in taking climate action will sharply increase the risks of irreversible changes of planetary systems. Momentum for a green tourism transformation was building before the pandemic, and has been given new impetus given the urgency and heightened awareness of governments for action.

Restarting tourism whilst redesigning the system is complex and hampered by a wide range of factors that further test the resilience of tourism, and is made more challenging by the relatively narrow window of opportunity to act. Labour shortages coupled with strong pent-up demand have led to travel chaos at major transport hubs, and are constraining recovery overall as businesses struggle to attract skilled and unskilled workers. Russia's war in Ukraine is undermining geopolitical stability and denting travel confidence. It is also adding additional flight hours from rerouted flight paths. Rising energy costs and the cost-of-living crisis are reducing people's ability to afford travel, and increasing the cost of doing business.

Box 3.1. Opportunities to promote a green tourism recovery

Recent events, including the crisis triggered by the COVID-19 pandemic and the changed economic and geopolitical context, have resulted in a changed environment for tourists, businesses and destinations. These changes also bring opportunities to promote the green transition within the sector through:

- Sustainable local products and destination development: catering to tourists with a greater appreciation of the environment and desire to connect with nature
- Shifts toward local tourism: driven by increasing costs, uncertainty and sustainable choices. This can reduce GHG emissions and encourage diversification from local visitor opportunities.
- Longer-stay visitors (including digital nomads): building on new opportunities from increased remote work and work flexibility to increase the value, both for the destination and the traveller.
- Better destination management: understanding tourist volumes and investing in the required infrastructure and mechanisms to manage these sustainably.
- Innovative business models: businesses have an opportunity to restructure, upskill and invest in new technology as part of the recovery to be more digital, sustainable, resilient and inclusive.
- More government and private sector co-operation: the pandemic triggered a whole-of-government response that could present countries with an opportunity to evaluate the positive cross-sectoral interactions and integration, and apply these governance innovations to future policy challenges.

Governments across the OECD and in partner economies have rolled out targeted measures to support households and firms. The energy crisis highlights synergies between the green transition and energy security, and the need for government to support energy efficiency improvements and invest in the capacity of firms to adapt their energy consumption and shift away from fossil fuels (OECD, 2022^[3]). The combination of these factors creates a volatile mix, but reinforces the need to pivot towards a greener, more resilient tourism model.

Redefining prosperity, wealth and what tourism success looks like is at the heart of a successful and green recovery. Tourism can help drive the sustainable transition, building on principles that were reinforced through the pandemic including improved management of visitor volumes and flows, and a desire for tourists to be in nature (Box 3.1)

However, progress will be limited if tourism returns to 'business as usual', based on a volume over value business model. Progress also depends on changes in other sectors and parts of the economy, given the highly interconnected nature of the tourism economy (e.g. transport, agriculture). As tourism recovers, and governments look to rethink and reshape a greener, more sustainable tourism economy, these efforts can benefit from initiatives such as reflecting on a new economic narrative and new ways of measuring progress, as proposed in OECD work on the Elements for a New Growth Narrative (OECD, 2018^[4]).

Mitigating and adapting tourism to climate change

Climate risk is a key concern, both in terms of tourism's substantial contribution to greenhouse gas emissions, and its exposure to multiple and often cumulative climate impacts (Scott et al., 2019). Reliably estimating tourism's carbon footprint is challenging, but recent estimates range from 8% to 11% of global emissions (WTTC and UNEP, 2021^[5]). Global temperatures increased by 1.1°C between the periods 1850-1900 and 2010-19 (IPCC, 2021^[6]). Warming of 1.5°C is likely to be reached by 2030, with wide ranging consequences for tourism destinations. Catastrophic flooding events such as those experienced in Germany and Belgium, or bushfires that threatened tourists and locals in Australia, France, Greece, Portugal and the United States in recent years are pertinent examples. The 2022 heatwaves in the northern hemisphere are another reminder of changing climate conditions.

Tourism policies to address greenhouse gas (GHG) emissions (mitigation) and prepare for climatic changes (adaptation) remain limited, and policy integration across tourism and climate change also needs to be strengthened. Policy is particularly lacking in the area of transport, which is a core element of the tourism value chain and a key contributor to carbon emissions. UN World Tourism Organization /International Transport Forum analysis found that tourism CO₂ emissions grew by at least 60% during the period 2005-16, with transport-related emissions from tourism representing 5% of global emissions in 2016, and could rise by a further 25% or more in CO₂ emissions by 2030 (UNWTO and ITF, 2019^[7]). According to the ITF, current decarbonisation policies are considered insufficient to pivot passenger air transport onto a sustainable path (ITF, 2021^[8]). In this context, the ambitious target recently adopted by the International Civil Aviation Organisation (ICAO) Air Transport Action Group to achieve net-zero carbon emissions by 2050, through accelerated efficiency measures, energy transition and innovation across the aviation sector and in partnership with governments, is welcome.

There is a growing recognition in the tourism sector of the urgency of climate risks and need to accelerate action. Signatories to the Glasgow Declaration on Climate Action in Tourism adopted at COP26 in 2021 commit to taking action to reduce emissions by 50% by 2030, and to reach net zero as soon as possible before 2050. In 2021, the World Travel and Tourism Council (WTTC), together with the UN Environment Programme (UNEP) put forward a net zero roadmap for travel and tourism businesses, while the World Economic Forum's Clean Skies for Tomorrow coalition has set the target of powering global aviation with 10% sustainable aviation fuel by 2030.

Programmes like the One Planet Sustainable Tourism Programme and 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns are also helping to drive action on this important agenda. Under the G20 Italy Presidency in 2021, G20 Leaders endorsed the Rome Guidelines for the Future of Tourism, with green transformation one of seven pillars to rethink and reshape tourism (OECD, 2021^[9]). Linked with the EU Green Deal, the European Commission Transition Pathway for Tourism includes a focus on the transition to greener business models, including through sustainable mobility and integrated circularity for tourism services (European Commission, 2022^[10]).

Promoting efficient resource use and reducing ecosystem decline through tourism

The linkages between climate change and ecosystem degradation are widely recognised. Climate change has led to or accelerated irreversible losses of species in all environmental ecosystems – on land, sea and in fresh water. It also compromises ecosystem structure and function, and undermines resilience. It is estimated that around 1 million species are now threatened with extinction, and 75% of terrestrial and 66% of marine environments are “severely altered” by human actions (IPBES, 2019^[11]). The UN Decade on Ecosystem Restoration 2021-30 aims to prevent, halt and reverse the degradation of ecosystems worldwide. Restoring the health of ecosystems is essential to re-establish planetary health; a new concept that connects human health and civilisation with ecosystem health (IPCC, 2022^[12]).

Tourism, like many sectors, contributes to ecological decline in multiple ways, while natural landscapes and biodiversity are also drivers and assets for tourism. One major issue is plastics pollution, as reflected in the agreement to develop a global treaty on plastics pollution. Global plastics production soared from 234 million tonnes in 2000 to 460 million tonnes in 2019 (OECD, 2022^[13]). While the decline in economic activity caused by COVID-19 temporarily curtailed this growth, certain plastics applications such as personal protective equipment grew significantly. Plastic pollution poses substantial risks to tourism livelihoods, especially those that depend on the integrity of marine and terrestrial ecosystems.

Addressing the negative impacts of tourism’s resource consumption requires a transition towards the circular economy, in which economic activities regenerate human and natural capital (UNEP and World Bank, 2021^[2]). This involves identifying, fostering and investing in sustainable processes focused on reducing, reusing, repairing, refurbishing, recycling, and repurposing (business to business). These changes can help to minimise wastage, reduce emissions, and diminish economic leakages in tourism whilst creating new business opportunities and promoting shorter, local supply chains. As a service sector there is also considerable potential to decouple economic tourism activity from environmental impacts through the development of low consumption activities (e.g. guided walking tours).

Addressing social dimensions of environmental challenges linked with tourism

Climate resilient development brings together governments, civil society and the private sector through multi-dimensional governance that focuses on risk reduction, equity and justice (IPCC, 2022^[12]). A green tourism transition involves reconsideration of governance arrangements and collaboration across the tourism value chain. Increased multi-stakeholder governance in tourism has continued to develop through the pandemic, including through multi-lateral and global agreements and frameworks that provide guidance for national policy-making. Networked governance arrangements connect national opportunities with the local level context and help to optimise decision making. Fostering the networks developed through the pandemic and building more integrated governance systems has the potential to increase tourism’s ability to transition, as stakeholders at all levels are actively involved in the design process. Participative approaches that involve all actors with an inherent stake in achieving sustainable outcomes in a destination can increase the chances of long-term success.

Increasing consumer awareness can also support both private and public sector actions for a more sustainable tourism model. A recent Eurobarometer survey on attitudes of Europeans towards tourism highlighted that 82% of EU citizens expressed interest in supporting more sustainable tourism, for example, by consuming locally (55%), choosing environmentally friendly transport (36%), paying more to protect nature (35%) or to benefit the local community (33%) (European Commission, 2021^[14]). These findings are echoed by 2021 surveys from Booking.com and Skyscanner and the growing trend of ‘flight shaming’ which is representative of this shifting consumer sentiment.

Toward a greener, more sustainable future for tourism

Momentum is gathering in the sector for the green tourism transition. However, decision makers need to navigate several systemic and acute challenges to convert this momentum into actions with impact:

- Financial constraints: Tight budgets demand that the transition is cost-effective and value-generating.
- Labour shortages and skills gaps: Ongoing labour shortages and gaps in knowledge or skills, including those related to green service delivery, could hinder the tourism recovery.
- Inefficient infrastructure and assets: Green and sustainable tourism need new and more efficient infrastructure (e.g. charging stations for electric vehicles, cycle paths, renewed building stock).
- Limited tourism policy integration: Key policy areas like transportation, environment, infrastructure, regional economic development, and emergency services are pivotal to the green transition and the lack of integration poses barriers to coherent strategies to facilitate green tourism.

The unprecedented support measures introduced in response to the pandemic have been an opportunity to strategically support those parts of the tourism system that are more likely to form part of the green transition. However, analysis shows that only one-third of pandemic support and recovery packages were classified as environmentally positive and supporting sustainability and transformation (OECD, 2022^[15]). For example, only 2% of total funding support during 2020-21 to the aviation sector was assessed to be environmentally positive. Governments should not miss the opportunity to make support measures conditional on making progress on environmental challenges, and catalyse conditions that foster a greener tourism transformation.

Encouraging greener tourism business models and destinations

Governments have a key role to play to support greener businesses and destinations, and ensure that sustainability principles are firmly embedded in recovery plans. This means taking steps to incorporate decarbonisation, climate resilience, ecosystem restoration and inclusion into policies, programmes and future-oriented strategies that are also aligned with the Paris Agreement and SDGs. It involves having a strategic view across the tourism system, and creating favourable framework conditions at the national level, to provide an effective compass to guide policy and decision making.

Coherent and co-ordinated action across policy areas is important to work toward common goals, maximise the positive outcomes for tourism, and wider greening measures, and avoid unintended consequences. Facilitating the collaboration of key actors is another important role for government at all levels, and one where regional and local governments are increasingly active. Managing system change can only be successful if all relevant actors are involved. In Ireland, for example, a guiding principle of the Sustainable Tourism Working Group is all of government working together with industry towards achieving a sustainable tourism sector (Box 3.2).

Businesses are at the forefront of the green transition, with the many small and medium sized businesses (SMEs) that connect the visitor with the place through creating experiences having a particularly critical role to play. Delivering on the SDGs and carbon reduction targets requires much greater engagement with SMEs, which make up around 85% of tourism businesses in OECD countries, on average. This requires support in the form of targeted financial assistance, alongside capacity building to encourage sustainability innovation and new business opportunities (OECD, 2021^[11]).

The business case for sustainability action has never been more prominent, as is the opportunity to capitalise on wider societal shifts to more sustainable consumption patterns. Rapidly increasing operational costs are putting pressure on many tourism businesses, but also create significant interest in energy savings and resource programmes, and provide a strong incentive to consider energy efficiency

investments and make changes to conserve resources. The growing awareness of customers and opportunities for green branding support such changes.

Destination decision makers and businesses often face similar challenges but can also join forces to maximise opportunities. Government can advance, in turn, the business and destination transition by reducing barriers (e.g. information, resources) by promoting awareness around changing legislation and technology (e.g. renewable energy solutions, smart metres, zero waste solutions), providing better access to skills (e.g. long-term planning, digital skills, practical skills for repair and repurpose) and implementing financing and funding to undertake green action (OECD, 2021^[1]).

Box 3.2. Actions to promote sustainable tourism practices in Ireland

The Sustainable Tourism Working Group was established under Ireland's Tourism Action Plan 2019-21 and sets the ambition for Ireland to be amongst the world-leaders in sustainable tourism practices. The Group has identified a range of actions to promote sustainable tourism practices, through an interim action plan from 2021-23. This involves building greater sustainability awareness among tourism stakeholders and the general public, and take sustainability into account in policy development, business planning, destination management and promotional activity. Some of the key recommendations include:

- Ensuring greater community involvement in destination planning to maximise the potential of nature-based solutions in local tourism.
- Providing better access to information and tools for visitors to practice responsible tourism through the development of carbon calculators which will allow visitors to evaluate the impact of their carbon footprint on the environment.
- Stimulating change in the tourism sector by identifying and delivering incentive schemes to address key change barriers and drivers.
- Developing a sustainability pledge for visitors to support Ireland's efforts to help preserve the environment and act in a responsible and sustainable manner.
- Assigning responsibilities within the tourism agencies to provide strategic direction and increased profile for sustainable tourism development.
- Assigning a senior industry representative to act as a sustainability champion.
- Identifying and developing destinations that have the potential to be promoted as best in class in terms of sustainability.

Work to develop a new national tourism policy will be informed by the Sustainable Tourism Working Group. In particular, the actions which aim to build an evidence base and measurement mechanisms across social and community considerations will help shape policy.

OECD work on SMEs highlights that the share of green spending targeted at SMEs in general is modest, representing 2.9% of green recovery packages (OECD, 2022^[16]). Additional measures are needed to ensure that SMEs are equipped to finance actions to reduce their carbon footprint and contribute to sustainability objectives. Countries are looking to implement both financial (e.g. grants, loans, subsidies, tax breaks) and non-financial (e.g. advice, consultancy, tools) supports for businesses. To benefit, tourism SMEs will need to be able to access these supports. Businesses providing different types of tourism services (e.g. business, holiday, events) in different destinations (e.g. mountain, beach, city) and types of tourism have specific needs and profiles. This may require some flexibility and adaptability to ensure the supports cater to tourism businesses in all parts of the tourism ecosystem. In South Africa, for example, the Green Tourism Incentive Programme aims to encourage and support tourism businesses to adopt more sustainable business practices (Box 3.3).

Box 3.3. Incentivising greener tourism business practices in South Africa

Launched in 2017, South Africa's Green Tourism Incentive Programme is a resource efficiency incentive programme that assists small and micro-tourism businesses to adopt sustainable tourism practices. The programme is linked to South Africa's policy for pursuing responsible, sustainable tourism, as set out in the National Tourism Sector Strategy, and the White Paper on the Development and Promotion of Tourism.

Through grant funding, the programme focuses on promoting energy-efficient operations for the tourism sector. It funds water and energy efficiency assessments, which establish the most optimal green solutions for each audited establishment. The solutions are then funded on a sliding scale from 50% to 90% capped at ZAR 1 million (USD 54 553). Participants in the programme benefit from a reduction of their overall operational costs over time with the associated advantages in respect of competitiveness. Beneficiaries include guest houses and lodges reflecting the focus on small and micro enterprises.

Prior to the full roll out, a pilot was implemented, focusing on retrofitting tourism facilities with solar photovoltaic energy generating systems at eight major sites. One such project was implemented at the UNESCO World Heritage Site, Robben Island Museum. The island had a ZAR 25 million (USD 1.4 million) solar powered mini-grid plant installed under the project. At the time, the island was operating entirely on diesel generation as it has never been connected to the country's electricity grid. The intervention was projected to reduce the use of diesel generators by over 40% and generate a saving of ZAR 5 million (USD 274 492) per annum whilst also saving tons of carbon emissions. The "payback period" for the project was therefore five years.

Reducing tourism's carbon footprint to support better environmental management

Reducing carbon intensity contributes significantly to the wider goal of a green tourism transition. Reductions in energy use in particular often bring positive flow-on effects for additional resource efficiencies (especially in relation to the energy-water nexus) and dematerialisation of products. Also, companies that invest in future-proof technologies, processes and markets tend to deliver better business performance, higher staff retention, customer loyalty and community support (Whelan and Fink, 2016^[17]).

Carbon literacy and low-carbon innovation

Greater carbon literacy is needed across the tourism ecosystem and among all tourism actors, to encourage action and identify new solutions. Building carbon literacy improves awareness of climate change and impacts in everyday practices and behaviour. It can be enhanced through formal education and training, online resources, business networks and clusters, and bespoke outreach and tools for tourism decision makers, such as decision making frameworks and templates to build the business case. Understanding the GHG emissions profile of tourism also helps governments decide where and how to invest into innovation to maximise the decarbonisation impact.

Helping businesses and destinations measure their carbon and wider environmental footprints (e.g. water) is one approach that can help raise awareness. Tangible evidence of the carbon implications of different market segments or tourism activities supports businesses to design low carbon portfolios and invest in energy management (Box 3.4). Measurement also helps destination management organisations develop low carbon strategies and attract preferred consumers. The approach of measuring tourists' carbon footprint is complemented by private sector initiatives which inform travellers about the carbon emissions associated with different travel options, to inform more sustainable choices (e.g. Skyscanner, Google, Bookdifferent.com).

Destination foot-printing is in its early stages but can benefit from initiatives to reduce GHG emissions – an opportunity for policy integration between national and urban/local government agencies. Examples of destination actions are set out in (Box 3.5).

Norway has developed a strategic planning tool to measure emissions and promote climate friendly tourism. The CO2rism calculator estimates the amount of transport-related CO₂ emissions associated with visitors travelling to and within Norway (Box 3.6). Similarly, Visit Finland is creating sustainable route suggestions and a digital trip planner targeting responsible visitors.

Box 3.4. Building carbon literacy in the tourism sector: selected country approaches

Colombia: An online training platform with practical interactive content aims to build skills for tourism businesses related to best practices in sustainable tourism. A complementary online course on sustainable gastronomy was launched in October 2020 in partnership with World Wildlife Fund Colombia and the UN Environment Programme.

Malta: The Ministry of Tourism, in partnership with SUNx (Strong Universal Network), is working to accelerate climate action through the development of a capacity building diploma in climate-friendly travel for the next generation of tourism-climate ambassadors.

New Zealand: The Tourism Industry Aotearoa Association carbon challenge urges tourism businesses to measure their carbon footprint, take action to significantly reduce carbon emissions by 2030, and contribute to a tourism sector that is net zero carbon ahead of New Zealand's 2050 goal. The carbon challenge is complementary to the Tourism Sustainability Commitment and Qualmark – two quality and sustainability assurance programmes available to businesses.

Peru: The Ministry of Foreign Trade and Tourism developed an eco-efficiency manual for the hotel sector to improve energy management, in co-ordination with The Ministry of Energy and Mines. The Ministry of Foreign Trade and Tourism is in the process of harmonising the Good Practice System, aimed at promoting practices on circular economy, use of clean technologies, and reduction of greenhouse gas emissions for tourism service providers. It has also worked with the Ministry of the Environment to develop the Carbon Footprint Tool of Peru for tourism businesses.

Saudi Arabia: Climate action is being addressed through the Saudi Green Initiative and new Sustainable Tourism Global Centre, which is a collaboration between the Ministry of Tourism and Ministry of Energy. The new Centre supports the Tourism Panel on Climate Change, an independent science-based collaboration of global experts to deliver a tourism-specific assessment of climate knowledge and action.

Box 3.5. Destination-specific actions to reduce carbon emissions: selected country approaches

Austria: The two destinations, Nassfeld-Pressegger See/Lesachtal/Weißensee and Zell am See-Kaprun, are designated as Climate and Energy Model Regions. Since 2021, they are being supported with EUR 1 million each by the Climate and Energy Fund to increase the use of local energy resources, improve energy efficiency, and decarbonise mobility. The Clean Alpine Region project in Tyrol is also supporting tourism regions to implement measures in the areas of climate protection, sustainability and energy and in developing further as climate-friendly regions.

Canada: The mountain resort community of Whistler has had a Community Energy and Climate Action Plan in place for nearly a decade. Updated in 2020, the Action Plan commits to reducing GHG emissions by 50% below 2007 levels by 2030. It focuses on a Climate Action Big Moves Strategy to enable Whistler demonstrate leadership in redefining tourism in a low carbon world. These big moves occur in transport (e.g. 50% of all trips are by transit and active transportation), buildings (e.g. new buildings by 2030 are zero carbon, reduce emissions from residential buildings by 20% and commercial buildings by 40%), and waste (e.g. reduce waste emissions by 95%).

Greece: A pioneering project aims to make Astypalea the first smart and sustainable island with energy autonomy in the Mediterranean, and achieve zero-emissions mobility by 2030. It involves the gradual replacement of conventional private and public vehicles on the island with electric vehicles, and the introduction of an innovative transportation system based on shared mobility. It also promotes the production of electricity from renewable energy sources. The project is being implemented over six years, in partnership with the Volkswagen Group.

Spain: Visit Valencia is taking action to become a carbon neutral destination by 2025 by using the SDG compass to monitor and improve performance. The decarbonisation roadmap involves: i) baseline footprint calculations, ii) implementation of a digital management system, and iii) development of compensation projects at the destination. The climate strategy also addresses improving quality of life of residents and enhancement of cultural and natural heritage.

Regulating and incentivising good practice

Policy instruments, such as carbon taxes, emission standards for vehicles, fuel mandates, and building standards often play a part in wider economic decarbonisation strategies, including in the tourism sector. Tourism-specific regulation is less common, with governments opting for support programmes and incentives to build a greener tourism production model. In Germany, for example, the ClimaHost programme aims to support accommodation establishments that have implemented innovative climate action measures and contribute to sustainable tourism in the Alps region.

The pandemic provided motivation for countries to reconsider how to improve and encourage uptake of sustainability programmes for tourism businesses and destinations. Evaluating the impact of existing programmes should be a priority, alongside consolidation as multiple programmes could confuse and undermine the purpose of initiatives targeting tourists and businesses.

The private sector is also taking a more proactive role in putting in place initiatives or levers that foster a green transition (e.g. new award schemes). Analysis by TUI, verified by UNEP, shows that hotels with sustainability certifications achieve 10% lower CO₂ emissions, 24% lower waste volume per guest night, and used 23% more green energy. Hotels with sustainability certifications also received higher customer satisfaction scores, compared to non-certified hotels (One Planet, 2021^[18])

Box 3.6. Measuring tourism-related transport emissions in Norway

Norway has developed a tool, CO2rism, for estimating the amount of transport-related CO₂ emissions associated with visitors travelling to and within Norway. It is one of several operational tools to support destinations shift to more sustainable tourism planning and development under the National Tourism Strategy 2030. It takes a passenger-based approach and was developed by Innovation Norway, in collaboration with the Norwegian Institute for Air Research. The CO2rism tool is used by destinations to gain insights into the emissions profile of different tourists. By combining emissions data with data on tourist arrivals, the main transport mode from different source markets, and tourist travel patterns, the calculator estimates CO₂ emissions connected to each of the markets. Length of stay is also calculated, with information on emissions per day.

Users of the tool have multiple choices to adjust the input data according to tourist numbers, length of stay, and origin markets. The emissions of each transport mode (air, ferry, train, car, bus and camper) are distributed to the tourist based on the number of passengers that share the emissions. The resulting output is a measure of tourist emissions travelling to, from and at a destination, based on the place of origin, destination region and length of stay of the tourist. The highest CO₂ emissions from tourism transport to and in Norway are from aviation (71% of total CO₂ travel emissions), followed by ferries and cruises (21%). More than 50 destinations in Norway use the tool to report on tourism transport emissions. The tool is also helping to raise awareness, highlight the consequences of shifting markets, and stimulate actions for longer stays and the change to low-emission transport, where possible.

Most OECD countries have some form of quality standard or green certification programme in place for tourism; however, participation is often voluntary and 'hard measures' or targets are lacking, including for the measurement and reduction of GHG emissions. France, for example, in 2022 implemented a new classification system for tourism accommodations based on sustainability standards. For hotels, the number of sustainability criteria has doubled, while the number of mandatory criteria has increased fourfold. New standards include waste management, energy and water consumption, integration into local supply chains, and the use of organic, fair-trade and ecological products. Importantly, one criterion concerns the information given to guests on low carbon transport, highlighting how decarbonisation involves hosts and tourists alike.

There is an increasing interest in measuring and auditing destination performance, linked with the shift in focus from destination marketing to destination management. Austria has created a new ecolabel for destinations, to accelerate the green transition, improve regional value chains and respond to the increased demand for sustainable holidays (Box 3.7). The comprehensive criteria include innovative measures such as the requirement that at least 30% of promoted tourism products must be considered sustainable, and the recommendation that finance destination activities are financed using certified green finance products.

Norway has expanded and adjusted its Sustainable Destination Certification scheme, which enhances destination management, and a new regulatory framework for more sustainable fishing tourism has been implemented. The sustainable tourism policy of Norway has also included measures on marking a growing number of National Hiking Trails to make them more robust, accessible and attractive for visitors.

Box 3.7. Ecolabel for tourism destinations in Austria

In 2022, Austria created a new ecolabel for tourism destinations to accelerate the green transition, improve regional value chains and respond to the increased demand for sustainable holidays. The ecolabel is targeted at tourism destinations at the regional level and not at the operational level (e.g. locations such as resorts, amusement parks). A key requirement is the co-operation of tourism management with political actors and tourism businesses of the destination as well as sufficient financial, personnel and time resources for implementation.

The ecolabel criteria were developed in a comprehensive discussion process with relevant stakeholders and experts from the tourism sector, including 19 pilot destinations, and is based on the European Tourism Indicator System and the internationally recognised criteria of the Global Sustainable Tourism Council. The label comprises a comprehensive set of 63 mandatory and 56 optional criteria, the latter based on a scoring system with a minimum number of points to be achieved at the time the application is submitted. The criteria cover the following areas:

- Management: sustainability strategy and mission statement, planning and development, offers and advertising, partner commitment.
- Socio-economic impact: regional economy and infrastructure, education and work, diversity and accessibility, fair trade.
- Environmental protection: climate protection and climate change adaptation; nature conservation and biodiversity, landscape protection; energy; water, waste, air, noise, light.
- Mobility: connectivity arrival/departure, mobility on site, co-operation and offers.
- Culture: cultural assets and intangible heritage, traditional and contemporary culture, visitor management.

Incentivising better practice in tourism could benefit from alignment with other, non-tourism programmes. In Colombia, the Ministry of Tourism has aligned with the National Circular Economy Strategy to launch a competition to finance innovative waste management or eco-design projects that advance circular economy models in tourism. A circular economy connections programme for the tourism value chain and its suppliers is specifically designed to encourage SME participation. Thailand is taking a similar approach, by aligning tourism recovery with the national Bio-Circular Green Economy Plan, opening support for new approaches and products, including agritourism and community-based tourism initiatives.

Adapting to climate change and building tourism resilience

Climate and other risks demand more attention from businesses and destinations to identify threats and devise strategies to manage them. Many larger companies are already required to undertake climate risk assessments and disclose them to their stakeholders, with implications for tourism (Box 3.8).

However, businesses of all sizes frequently lack the knowledge and resources to undertake such assessments. Facilitating knowledge transfer and data access (e.g. sea level rise, flood maps), creating business tools (e.g. calculating financial implications of climate risks), and implementing preventive actions are all areas where government can play a role. In Mexico, the ADAPTUR project aims to support the tourism sector in climate adaptation, and strengthen business capacity to undertake concrete actions, such as economic risk assessments for the hotel sector and real estate projects, and tourism involvement in restoring and protecting mangroves and coral reefs.

Box 3.8. Implications of mandatory climate risk disclosure for tourism businesses

Mandatory disclosure of climate risk for publicly traded companies was supported by the G7 countries in the Carbis Bay G7 Summit Communiqué in June 2021, in line with the recommendations of the Task Force on Climate-related Financial Disclosures. Mandatory disclosure requirements were also a key part of the financial sector response at COP 26 in Glasgow the same year.

Guidance has also been developed by the European Bank for Reconstruction and Development and the Global Centre for Excellence on Climate Adaptation. The recommendations most important to tourism operators include:

- Assess exposure to all first-order physical climate impacts.
- Assess physical climate risks over the duration of an asset's lifetime.
- Provide detailed information on the financial impacts of recent extreme weather events.
- Disclose the impacts of weather variability on value chains.
- Perform forward-looking assessments of physical climate risks.
- Identify opportunities based on managing physical climate risks and related market shifts.
- Consider current and desired GHG concentration pathways and related warming projections as a basis for scenario analysis of physical climate risks and opportunities.

Source: European Bank for Reconstruction and Development and the Global Centre of Excellence, 2018^[13]

Several destinations are proactively investing in climate change adaptation. In Iceland, the Varða/Sites of Merit programme aims to integrate climate adaptation into a wider destination management framework at popular tourist sites. Australia is investing in the resilience of coral reefs through the AUD 150 million Reef Restoration and Adaptation Program, which is looking at new initiatives to help coral reefs adapt to climate change, and the AUD 100 million Oceans Leadership Package. The Oceans Leadership package will invest to protect oceans, support blue carbon habitats and ecosystems and contribute to emissions reduction through the restoration of mangroves and tidal marshes to store carbon and reduce methane and nitrous oxide emissions.

Climate resilience needs to consider the whole value chain, with the links between tourism and primary industries such as agriculture and forestry particularly important. Fostering links between tourism and agriculture, for example, can build resilience for both sectors. Local and traditional food and agricultural products have been highlighted as an important opportunity. For example, Hungary's Traditions Flavours Regions Programme protects the designations of origin for wine products and food specialities. In Costa Rica, the Tourism Local Development Engine created in 2021 aims to improve the life of agricultural communities through the identification of market opportunities in the tourism sector for sustainable agriculture value chains adapted to climate change.

Building resilience in destinations that are particularly exposed to risks is an important strategy, especially when political or economic goals such as regional development depend on a healthy tourism sector. In France, for example, the Mountain Futures Plan launched in 2021 aims to promote sustainable and resilient mountain tourism through three priorities, namely diversification of both products and customers, improvement of ecological performance of activities, and revitalising recreational real estate. The plan represents a commitment of over EUR 640 million of public funds for the mountains, generating nearly EUR 1.8 billion of investment in these areas. This is explored further in Chapter 2, Building Resilience in the Tourism Ecosystem.

Promoting ecosystem restoration through tourism

Improving the responsible use of natural capital is a core aspect of more sustainable tourism models. Governments can support the alliance between tourism and conservation by implementing mechanisms targeted at different parts of the value chain simultaneously, variously targeting tourism businesses, workers, infrastructure and natural assets (Box 3.9). Awareness raising is one important instrument – the Global Tourism Plastics Initiative, for example, unites the tourism businesses, governments and other tourism stakeholders behind a common vision to take concerted action, leading by example in the shift towards circularity in the use of plastics (One Planet, 2022^[19]).

Other instruments include initiatives to better integrate environmental considerations into tourism curricula and training, introduce visitor management systems, temporary closures of national parks and protected areas, and deployments of smart technology to optimise visitor flows. The Emilia-Romagna region of Italy launched a digital platform in 2022 to support local administrations and operators to better organise activities, prevent overcrowding and guarantee quality and sustainability of the activities related to nature and culture. There is also a trend to encourage visitors to ‘give back’ through programmes such as the Trees that Count initiative in New Zealand.

Financial incentives are another option. In Colombia, the Together with Nature Sustainable Tourism Policy rewards land acquisition for projects that serve both tourism and conservation outcomes through a 25% discount on income tax.

Box 3.9. Strengthening the tourism-nature relationship: selected country approaches

Businesses/organisations:

- **Peru:** A compensation mechanism for Ecosystem Services encourages tourism businesses to make a contribution to conservation, recovery, and sustainable use of ecosystems.
- **United Kingdom:** The Green Recovery Challenge Fund (GBP 80 million) supports projects that restore nature, address climate change and connect people to nature, while supporting jobs.

Workforce:

- **Colombia:** A preservation-oriented handbook for nature tourism guides called “Contemplation, Comprehension, Conservation” is designed to ensure the quality of nature tourism experiences.
- **Lithuania:** 12-month nature guide training courses have been launched under the wider project of Nature Guides Network with Germany and Poland as partner countries.

Infrastructure and natural assets:

- **Australia:** A fund was launched (AUD 33.5 million) for conservation work and infrastructure upgrades across 23 national and world heritage sites.
- **Canada:** Investment of CAD 2.3 billion over five years to conserve up to 1 million square kilometres of land and inland waters. In addition, Canada is investing CAD 200 million over three years to support natural and hybrid infrastructure projects, such as parks, green spaces, ravines, waterfronts and wetlands.
- **Latvia:** New investments for smart solutions to monitor tourism flows in protected areas and assess environmental impacts have been implemented.

Nature-based solutions are a great way to align disaster mitigation, conservation, and sustainable tourism. Restoring and protecting wetlands, for example, can improve water quality, support biodiversity, reduce flood risk, sequester carbon, and provide opportunities for ecotourism. The 2022 USA National Travel Tourism Strategy embraces nature-based solutions as a key strategy, supported by three actions based around collaboration, investment and information for communities and stakeholders.

Empowering local communities to promote a green tourism transition

Environmental challenges are intricately linked with social issues. A more inclusive tourism requires the empowerment of local residents to participate in and drive decision making for tourism, including to support the green transition. Participative, community-led destination management and experience development approaches can help to achieve this in a way that benefits local actors. Promoting local entrepreneurship opportunities also helps integrate tourism into the community, with economic diversification through tourism entrepreneurship – including in rural areas – part of a green recovery.

Costa Rica, for example, ran an initiative in 2020 to identify key challenges and solutions for a green tourism recovery. A total of 13 projects out of 195 proposals were selected and funded. Similarly, the Swiss innovation programme, Innotour, has been extended to 2023 at the level of CHF 30 million, and a Competence Centre has been set up to connect Swiss tourism more purposefully to the SDGs. In Mexico, the FORESTUR project is an example of using tourism as a social welfare tool with complementary economic benefits in forest communities, whilst contributing to the preservation and health of the ecosystems. It is aimed at social enterprises, which can make important contributions to economic and inclusive growth, community members and land holders.

Inclusion and empowerment can be fostered through greater access to knowledge for those who lack resources or capability. Internet connectivity is a key facilitator in this process, particularly in rural areas. Vulnerable and marginalised groups require particular supports, also to ensure that they are not unfairly and negatively impacted by measures to promote the green tourism transition. Governments can also help to address inclusion through programmes tailored for women young people, migrants and indigenous populations which may require particular supports (OECD, 2020^[20]; OECD, 2020^[21]). Non-governmental organisations are also providing online support platforms for training, capacity building and networking (OECD, 2022^[22]), for example Tourism Cares' Meaningful Travel Platform.

Indigenous culture remains a key part of many communities, and can play a central role in an inclusive and sustainable tourism ecosystem. Indigenous knowledge and participation can also benefit the green transition through their traditional knowledge systems (MBIE, 2022^[23]). In Australia, the Camping with Custodians programme builds community-operated campgrounds on Aboriginal and Torres Strait Islander land where visitors have the chance to stay with traditional owners to experience Aboriginal culture. The programme provides job security for Indigenous communities through seed funding and developing small-scale resilient and sustainable tourism enterprises that are then transitioned back to Traditional Owners. In Canada, the Indigenous Tourism Association of Canada has facilitated the COVID-19 Development Stimulus Grant to support indigenous tourism SMEs, through non-repayable grants, to develop or maintain business activity.

New Zealand has developed a values-based approach to regenerative tourism. A Tourism Adaptation Roadmap is being developed, through voluntary initiatives bringing together leaders from the public and private sectors to investigate the state of natural resources, and to commit to priority actions that will halt and reverse declines (Box 3.10).

Box 3.10. Shift to a values-based regenerative and climate resilient tourism in New Zealand

In New Zealand, financial support is available to support destination management in the form of grants to the 31 Regional Tourism Organisations as part of the 2020 'Tourism Recovery Package' and the 2021 'Tourism Communities: Support, Recovery and Re-Set Plan'. The investment aligns with growing momentum towards regenerative tourism – set out in the 2021 Industry Transformation Plan – that is reflected in a wellbeing approach and explicit recognition of the values that underpin tourism.

New Zealand has developed a values-based approach to regenerative tourism. The Department of Conservation has developed a 'tourism tree' to visualise the importance of values, multiple outcomes from tourism, and the importance of 'giving back' to nature and people (Becken and Kaur, 2021^[24]). It connects directly to the Heritage and Visitor strategy's key pillars of Protect, Connect and Thrive. More work will be required to connect with Māori values and associated knowledge systems.

Aligned with the 2021 Industry Transformation Plan, a Tourism Adaptation Roadmap is also developed for local communities to respond to climate impacts. The roadmap is initiated by the Aotearoa Circle, an initiative that brings together leaders from the public and private sectors to investigate the state of natural resources, and to commit to priority actions. The development of the Roadmap aims to identify the risks of a changing climate for New Zealand's tourism sector, and to increase climate resilience.

Promoting green tourism recovery and transformation

The disruption caused by COVID-19 provided an opportunity to reflect and redesign the tourism system through new policies and governance arrangements. While governments have stepped up efforts to build sustainability capacity, foster innovation, and measure tourism's performance through enhanced multi-impact frameworks, more needs to be done to embed this into future tourism frameworks.

Embedding green principles in strategic tourism planning and policy

National tourism strategies are central to providing strategic direction and maximising the positive contribution of tourism to a country's prosperity and well-being. Strategies often reflect core values and provide an overall framework for more specific policy development, investment and stakeholder collaboration. Many countries are preparing tourism recovery plans and strategies which provide opportunities to embed targets and actions to promote the green transition.

In the new National Travel and Tourism Strategy 2022, the United States has put measures to reduce tourism's contribution to climate change at the centre of fostering a resilience and sustainable tourism economy that also protects natural resources, and supports the tourism economy and equitable development. Sustainability is positioned as the backbone of Peru's Reactivation of the Tourism Sector Strategy 2021-23, with the sustainable management of the unique experiences based on its natural and cultural wealth also central to competitiveness. Actions planned include the introduction of environmental regulations and streamlining of environment procedures for tourism, as well as tools to advance the circular economy, use clean technologies, and improve service quality. Korea launched a '2050 Carbon Neutral Promotion Strategy' in 2020 and conducted a study on tourism policies to respond to achieve carbon neutrality.

Box 3.11. Estonia's National Tourism Strategy 2022-25

Estonia's National Tourism Strategy 2022-25 has a goal to become a sustainable tourism destination that offers visitors diverse and unique travel experience in all seasons. Estonia's cross-cutting approach on sustainability is defined by three principles: valorisation of the local culture, the environment and the community; co-operation; and contribution to fulfilling the UN SDGs. Activities already set out by the Estonian Tourist Board for the period 2022-25 to enhance the sustainability and resilience of Estonian tourism sector include:

- Participating in international Green Destinations programme, running annual GreenEST summit and circular economy programmes.
- Recognising sustainable tourism operators and enhancing application of eco-labels.
- Sharing information and best practices about green investment and resource saving support options and the best sharing practices.
- Providing financial support for sustainable and inclusive tourism sector product development (EUR 14.1 million from REACT EU measures).
- Supporting new business models.
- Developing thematic networks and routes.

The Strategy also sets out several measurable goals for the tourism sector to be achieved by 2025. These goals include increasing the average length of stay of international tourists to at least four nights, increase participation in the network of sustainable tourism businesses to include at least 150 firms, and at least six Estonian destinations have received the Green Destinations Award.

The successful implementation of tourism strategies requires financial support and dedication of other resources. In Estonia, for example, the green transformation is an underlying principle of the Tourism Strategy 2022-25, and is supported by an overall investment of EUR 126.3 million in tourism development and marketing. This includes EUR 21 million for development of sustainable products and destinations, with a further EUR 17 million of REACT EU funding to directly support businesses to develop sustainable products and digital solutions for the tourism sector (Box 3.11). Tourism strategies anchored in sustainability, and supported through robust performance measurements, may also help countries tap into international green finance, for example the Green Climate Fund established by the UNFCCC.

Connecting tourism strategies to wider government priorities reduces policy conflict, and provides an opportunity to leverage existing investment and programmes designed at a larger scale than tourism alone. A greener tourism model needs to improve the integration of tourism with other sectors; politically, economically and socially. Egypt leveraged the Government's Sustainable Development Strategy to undertake a tourism gap analysis, for example, resulting in the development of 18 strategic goals for a green and digital transition in line with the UN SDGs.

Tourism is also often affected by broader government decisions or regulation in other policy areas. In environmental regulation, tourism organisations are required to comply with standards or rules typically created by non-tourism departments. Transport is another example of a policy area where decisions have a direct impact on tourism, such as recent announcements in the Netherlands on limiting the number into Schiphol Airport, and plans to halve the number of domestic flights in France. This highlights the importance co-operation across government to manage change related to the green transition.

The interdependences and linkages between tourism and other key value chains make the sector a strategic entry point to accelerate sustainability and circularity across the wider economy. For example, the food and beverage sector has strong supply linkages with tourism and is integral to tourism operations,

contributing 9% of tourism's global carbon footprint, rising to 17% if including agriculture. Building resilience and sustainability of the tourism sector therefore inevitably requires a holistic, cross-sectoral approach which considers related value chains and leverages potential synergies when designing policy interventions.

Collaborative tourism policy and programmes to support green action

Strong governance is a key enabler of the green tourism transition, requiring greater levels of efficiency, transparency, collaboration and stakeholder support (Becken and Loehr, 2022^[25]). Fostering multi-level governance is appropriate for tourism, which is characterised by its global-local public-private sector elements of the value chain. Fit-for-purpose governance helps optimise decision-making and allocation of resources (e.g. financial, knowledge, data, networks).

Suitable governance arrangements should be designed for the intended purpose. In Mexico, the Tlatocan or Great Council for Tourism Sustainability, brought together more than 130 participants, including government agencies, international organisations, civil society, indigenous communities, social enterprises, private companies, and academia. The initiative sat under the framework of the Mexico is Reborn Sustainable initiative which was developed collaboratively to transform the pandemic crisis into an opportunity to generate a radical change in tourism.

Partnerships are central to pandemic recovery responses designed to deliver sustainable outcomes in new ways that tourism agencies could not deliver by themselves (Table 3.1). These partnerships often include NGOs or private sector actors. In Greece, the Rhodes Co-Lab is a 'futures lab' for sustainable tourism established jointly by the TUI Group, TUI Care Foundation and the Government of the Region of the Southern Aegean. The Co-Lab will work with the local tourism sector and international partners to find innovative solutions to improve energy, water or waste management, and implement them on Rhodes. A think tank with international experts will further develop the sustainability transformation of the tourism sector. In Denmark, a partnership is set up to develop tourism initiatives to support the national reduction target on greenhouse gas emissions by 2030 (Box 3.12).

Box 3.12. Partnerships for green and sustainable tourism in Denmark

The National Strategy for Sustainable Growth in Danish Tourism incorporates many green and sustainable initiatives, to reduce greenhouse gas emissions, a 'comply or explain' model for sustainability standards, and legislation promoting electric car charging stations in popular tourism regions. A partnership consisting of VisitDenmark, Danish Coastal and Nature Tourism, Danish City Tourism (Wonderful Copenhagen) and Danish Business and Conferencing Tourism is working together to co-ordinate and disseminate initiatives to meet the national target of a 70% reduction in greenhouse gas emissions by 2030. Destination companies, relevant business and interest groups, ministries and experts are involved via established co-operation forums. It is intended to develop a method for measuring tourism's greenhouse gas emissions and the individual tourist's climate footprint. This will form the basis for identifying and organising initiatives that can reduce climate footprints in the long run. The partnership is also promoting the spread of certification schemes, highlight business opportunities to work sustainably and contribute to the green transition of accommodation capacity.

Table 3.1. Cross-government green tourism initiatives: selected country approaches

Country	Lead organisation	Partnership institution(s)	Initiative and purpose
Austria	Federal Ministries of Labour and Economy and of Climate Action	Several European countries: Ministries of tourism, climate action and transport	UNECE 'THE PEP Partnership on Sustainable Tourism Mobility' with the aim of bringing together national authorities, experts and stakeholders from all over Europe and raising awareness about the benefits of making sustainable mobility an integral part of tourism.
Costa Rica	Costa Rican Tourism Board	National Forest Financing Fund	Programme for visitors to plant trees and assist natural regeneration and agroforestry systems in the areas selected between both partners.
Denmark	Ministry of Industry, Business and Financial Affairs	VisitDenmark, Danish Coastal and Nature Tourism, Danish City Tourism (Wonderful Copenhagen), Danish Business and Conferencing Tourism	Co-ordinate and disseminate initiatives to meet the national target of a 70% reduction in greenhouse gas emissions by 2030. Develop a method for measuring tourism's emissions and the tourist's climate footprint. The partnership will also promote certification schemes, highlight business opportunities for the green transition of accommodation.
France	Ministry for The Economy - Directorate General for Enterprise	Caisse des Dépôts in conjunction with the Ministry of Economy, Finance and Recovery	Over EUR 3 billion in loans and repayable advances, amongst others, for the renovation of tourism real estate (hotels, tourist residences, holiday villages, open-air hotels, youth hostels, in all types of destinations) and for stakeholders in social and solidarity tourism.
Latvia	Ministry of Environment and Regional Development	Ministry of Economy, local authorities, non-governmental organisations, and others	Several projects, co-financed by the EU, focus on Latvia's coastline, for example "Vidzeme coastal cultural and natural heritage inclusion in the development and development of tourism services".
New Zealand	Department of Conservation	Ministry of the Environment	Jobs for Nature programme helps revitalise communities through nature-based employment, often partnering with tourism companies and stimulating the economy post COVID-19.
Peru	Ministry of Foreign Trade and Tourism	Ministry of the Environment	Promote climate change mitigation through the Carbon Footprint Tool, achieving 27 tourism companies registered, with 14 completing their carbon footprint measurement.
Romania	Ministry of Tourism	Ministry of Environment, Waters and Forests, the National Institute for Research and Development in Tourism, Ecotourism Association of Romania	Developed the system for evaluating ecotourism destinations in Romania, system based on the Global Criteria for Sustainable Tourism and the European Ecotourism Standard. So far, five tourism destinations have received this recognition.

Measuring and monitoring green tourism transition progress

Good governance involves monitoring and evaluation, and this goes hand in hand with improving tourism data and impact measurement via a range of sustainability indicators. Measurement is important to generate baselines, assess progress towards defined goals, and evaluate the effectiveness of specific interventions. It is also important to inform the development of evidence-based policy and programmes to promote the green transition. More progress is needed to better measure the economic, environmental and social dimensions of tourism, and develop timely and robust indicators and tools to monitor the effectiveness of tourism policies and the resilience and sustainability of tourism development.

In Germany, work by the German Federal Agency for the Environment (2021) to develop a Tourism Sustainability Satellite Account (TSSA) found that tourism's carbon intensity was higher than the average of the economy. Similarly, tourism's working conditions were on average poorer compared with other industries in the country. Innovatively, the German TSSA measures the raw material required worldwide throughout the entire value chain for the domestic provision of touristic products, alongside tourism-related expenditure on environmental protection services. Insights derived from these diverse sustainability dimensions inform the design of tourism support programmes in priority areas. Croatia is implementing a project to establish a Tourism Sustainability Satellite Account as part of the National Recovery and

Resilience Plan 2021-26. Statistics Canada, with the support of Destination Canada, is also examining opportunities to provide GHG emissions data generated by Canadian economic activity associated with tourism.

Systematic measurement of tourism impacts is essential for target setting and interim progress on longer term commitments like net zero by 2050. Norway's National Tourism Strategy 2030 sets a target of a 50% reduction of tourism's greenhouse gas emissions by 2030 (based on 2019 levels). To help achieve this, the aim is to reduce annual transport emissions by 10%. Target setting is also an important part of Portugal's Sustainable Tourism Plan and Finland's Sustainable Travel Finland Programme (Box 3.13). In 2022, Flanders in Belgium launched a new sustainability plan with 20 indicators to monitor destination management and the business operations of VisitFlanders, with a time horizon of 2030.

The private sector is also active in these issues – in Iceland, a new recovery dashboard by the Icelandic Travel Industry Association monitors performance against policy goals set out in the Tourism Future Vision until 2030, using indicators such as the share of companies with measurable sustainability goals, and the condition of tourist attractions within protected areas. Greece is also developing indicators to inform the adoption of climate change mitigation and adaptation measures in the tourism sector, as part of the National Strategy to Adapt to Climate Change.

Box 3.13. Measuring sustainable tourism progress: selected country approaches

Portugal: A Tourism Strategy 2027 was launched in 2017 with the vision to affirm tourism as a hub for economic, social and environmental development, and to position Portugal as a key competitive and sustainable tourism destination. In line with the Strategy, and the UN SDGs, Portugal has since developed a Sustainable Tourism Plan 2020-23 which follows on from the recovery plan Reactivate Tourism - Building the Future. Under the Plan, a set of 43 sustainability indicators are used to benchmark and assess progress for tourism businesses and the sector as a whole. Regular surveys are carried out on environmental practices and social responsibility in hotels and golf courses. The Plan stipulates the following targets for 2023: 75% of tourism companies with energy efficiency, water and waste management systems, and not using Single-Use Plastics; Clean & Safe Seal: 25 000 members, 30 000 graduates and 1 000 audited; and 50 000 professionals trained in the areas of sustainability. The set of initiatives covered by the Plan contribute to promoting an increasingly distinctive offer and to accelerating sustainability of tourism companies.

Finland: Visit Finland has developed sustainable tourism indicators as part of the national Sustainable Travel Finland Programme, which aims to support tourism companies and destinations in their sustainable development efforts. The indicators are based on extensive research and benchmarking against international criteria, standards and certification systems, and have been developed in close co-operation with the private sector. Helsinki, Lapland and other regions are committed to measuring their carbon footprint and integrating it into the national carbon footprint monitoring system to be developed. The set of indicators takes into account the requirements of Finland's northern location and the diversity of the tourism sector. It provides information about environmental impacts and destination management, as well as economic and sociocultural sustainability. Data captured is at national and regional, as well as company and destination level. Information comes from various sources, including official statistics, data provided by the companies and destinations taking part in the Sustainable Travel Finland Programme, as well as data from a pilot survey for visitors and local citizens. The first phase of reporting on the indicators began in the spring 2022, and the overall results of this round will be available in 2023.

Focusing on monitoring a particular tourist activity, the New Zealand Ministry of Business, Innovation and Employment provided NZD 800 000 to support the installation of approximately 100 visitor counters across the Ngā Haerenga Cycle Trails network. Bicycle tourism is a low-carbon form of travel that is also positively associated with positive economic activity in remote regions, particularly through supporting a diverse range of tourism SMEs. Data are used to evaluate the visitor experience, identify areas for improvement (e.g. congestion, infrastructure) and estimate economic impact of the cycle trail investment. Elsewhere, Austria is also measuring satisfaction of the local population regarding tourism in their region, alongside the share of renewable energy sources of total energy consumption of the hotel and gastronomy sector.

The European Union is piloting the EU Tourism Dashboard, an online tool that assembles and visualises tourism indicators to monitor progress on the green and digital transitions of the tourism ecosystem. The aim is to have the full dashboard available on the EU country level, and with selected indicators available at the regional and local level depending on data availability. The environmental policy pillar includes data on air travel emission intensity, tourism GHG intensity, tourism energy intensity, share of trips by train, bathing water, and dependence on long-distance tourists. Several countries are also piloting the Statistical Framework for Measuring the Sustainability of Tourism (SF-MST) advanced by the UNWTO to measure tourism sustainability in a coherent accounting system compatible with the statistical frameworks of national accounts.

Greening tourism infrastructure and services

Directing economic stimulus packages towards greener infrastructure and service is a tangible example of how to achieve policy integration between economic and sustainability goals. Tourism-targeted recovery programmes have mainly focused on economic aspects. Making recovery supports conditional on sustainability criteria, or even more importantly, directly support core elements of the green transition (e.g. investments into renewable energy and circular economy infrastructure), will help to promote a green recovery. As an important procurer of goods and services, the impact of public sector leadership on markets and norms should also not be underestimated. Ensuring that public sector funded or procured tourism infrastructure adheres to the highest environmental standards and contributes to both climate mitigation and adaptation is therefore important.

Decarbonising tourism transport infrastructure is a core dimension of the green transition. Several countries have used the pandemic to accelerate the uptake of electric vehicles in tourism. Iceland made funding available to accelerate the electrification of harbours and the rental car fleet. Similarly, the United Kingdom announced an investment of GBP 950 million in 2020 to extend the electric vehicle charging station network. This includes a sub-programme that could be used by small accommodation providers to install charging stations. Encouraging an electric charging network and vehicle fleet that is also suitable for longer distance holiday travel is an important step towards lower carbon tourism.

Encouraging a modal shift towards low emissions and human powered transport options is another element of the green tourism transition. Several countries are investing in rail networks, including the re-establishment of night trains. The EU Rail Baltica transport infrastructure project aims to integrate Estonia, Latvia and Lithuania into the European rail network. Rail Baltica will be fully electrified using the most up to date technology to minimise emissions.

Public sector investments into rail infrastructure can also support private sector initiatives such as the GreenCityTrip sleeper trains that now connect travellers from the Netherlands with 15 European city destinations. In Germany, the aviation sector and the national railways have joined forces to replace short domestic flights with train connections in a new joint action plan. In Morocco, the national tourist office and the national railway office signed a partnership agreement in 2021 for marketing and development of attractive travel solutions in sustainable mobility to stimulate domestic tourist flows.

Some new tourism products require a combination of public sector infrastructure investment and private sector entrepreneurship. Walking and cycling tracks are a pertinent example as their availability allows businesses to start up with different types of tours and value-add activities, such as linking to local food production and other cultural experiences. In Türkiye, for example, the Ministry of Culture and Tourism in partnership with the Turkish Tourism Promotion and Development Agency developed an online platform with cycling routes across Türkiye leading to regional spread and ‘slower’ forms of tourism. The Ministry also issues a Certificate of Bicycle-Friendly Accommodation Facility for bicycle-friendly providers.

Slovenia’s investment in sustainable gastronomy is a further example of greening the tourism offer. The Slovenia Green Gourmet Route and the Slovenia Green Cuisine label for restaurants are innovative extensions of the Green Scheme of Slovenian Tourism standard that credibly connect the unique place (nature, culture, food) with the visitor experience.

In Greece, the new Investment Incentives Law supports green investment, focusing on technologies that contribute to environmental protection and energy upgrade of tourism accommodation, through a simple framework that allows the business community to plan, develop and implement their initiatives. Tourism investments related to the promotion of special forms of tourism, considering the specific geographical, social and cultural characteristics of the different regions of the country are widely promoted.

Targeting and encouraging responsible tourist behaviour

Building on consumer changes and reinforcing positive actions can enable a smoother green transition. Some governments have proactively invested into marketing campaigns that encourage a shift towards more sustainable segments and behaviours. Switzerland’s ‘Swisstainable’ programme for example aims to create an effective movement toward broader change in tourism practices, together with the Swiss tourism sector. The Japan National Tourism Office is integrating aspects of ‘responsible travel’ into its promotional campaigns, with the aim of spreading tourism regionally, fostering nature activities and increasing environmental awareness.

Several countries demonstrate a major shift and innovation in how they position themselves with sustainability and a future-focus as the core of the message. This responds to evidence from the pandemic where people were looking for nature-based experiences and more sustainable (and safe) forms of travel. Visit Portugal for example launched a tourism campaign Can’t Skip Tomorrow, with the sub-slogan “Tomorrow is Today. Act Today, change Tomorrow. For a better Planet, a better tourism. Travel better”. Similarly, Visit Scotland promotes tourism through “Scotland: yours to enjoy. Responsibly.” This message is further supported by: “Let’s keep Scotland special now and for generations to come.” The Faroe Islands have gone one step further to promote ‘giving back’ by visitors and encourage visitors (at certain times of the year) who will actively engage in connecting to nature and making a contribution. The campaign is “Closed for maintenance, open for voluntourism”.

There is growing recognition among governments and business of the benefits of better understanding tourists’ motivations, beliefs and attitudes. A promising approach is promoting green behaviours through behavioural insights (Box 3.14).

To change tourist behaviour, countries are also developing visitor pledges and codes of conduct. The Icelandic Pledge encourages people to take a more active role in managing impacts (and safety); as such it sets norms or expectations and is likely to increase environmental awareness. To be effective, pledges need to be accompanied by rules and regulations, for example those implemented in Rome to prevent littering or climbing monuments, or those in Amsterdam, to stop unruly behaviour. Other examples of pledges are New Zealand’s Tiaki Promise, the Sustainable Travel Finland Pledge, and the Aspen Pledge in the United States. The ‘pledge’ is supported by infrastructure and systems that allow the visitor to adhere to the code of conduct (e.g. toilets, rubbish bins). This requires collaboration between national and local governments, as well as the private sector.

Box 3.14. Promoting green behaviours through behavioural insights

Behavioural science provides an innovative solution to reinforcing sustainable tourism by providing key empirical data on travel behaviour. Achieving ambitious sustainable tourism policy objectives can be challenging since they rely overwhelmingly on individuals' behaviours and preferences. Behavioural science provides an innovative solution to reinforcing sustainable tourism by providing key empirical data on travel behaviour, leveraging knowledge about human behaviour simplifying the pursuit of sustainable tourism decision-making, and generating human-centred services and policies tailored and targeted to their intended audience.

Inspiring small changes among individuals can optimise both commercial practices and sustainable tourism habits. These can be as simple as ensuring the green options are the default choice for consumers. For example, reducing meat consumption at events by making vegetarian the default or making lower-emission transport the default option in tour packages. Programmes to promote and encourage greener consumer behaviours are starting to be introduced across countries. The Philippines are utilising behavioural gamification methods which uses challenges, competition and reward-based incentives to inspire individuals to complete eco-friendly missions. The city of Helsinki leveraged choice architecture to develop a centralised digital platform to help residents, businesses and tourists make more responsible and eco-friendly decisions every day.

Adapting to shifts like local travel closer to home or longer stays for long distance travel, several countries have developed new visa policies. Countries are also looking to the growing market of 'digital nomads', as people adapt to the flexibility of remote working arrangements being adopted post pandemic. More than twenty countries have introduced new 'digital nomad' or remote worker visas to attract these new markets to come and stay for extended periods. In Costa Rica, the legislation provides legal security and incentives to workers who choose Costa Rica as their temporary home through the total exemption from income tax. Indonesia has extended a new visa for a period of five years and visitors are not required to pay taxes on income earned in other countries.

Policy considerations to support the green tourism recovery

The disruption caused by the COVID-19 pandemic has created the conditions for new future models of tourism where recovery measures play a central role in greening the tourism sector. This includes a people-centred green recovery focused on businesses, local communities and travellers. For this, it is critical to understand the tourism value chain, its dependence on the environment and physical resources, and socio-political levers for systemic change.

Tourism has its part to play in accelerating the transition to a low carbon, resource efficient and socially inclusive economy. Cleaner air quality, healthier water, effective waste management, and enhanced biodiversity protection not only reduce the vulnerability of communities and destinations, but also have the potential to boost economic activity, generate income, create quality jobs, and reduce inequalities. To achieve these goals, active policies will be needed to target reduced carbon emissions and pollution, enhance energy and resource efficiency, and prevent the loss of biodiversity and ecosystems. Building resilience and empowering communities and other voices in tourism provide a foundation for these changes.

A green recovery and transition necessitate a whole-of-system approach that understands not only the tourism value chain, but also wider economic and socio-cultural systems in which tourism is embedded. The symbiotic relationship between tourism and ecosystem conservation and restoration must be integral as well; also because healthy ecosystems play a key role in building resilience and responding to climate

change. This chapter has presented a wide range of policies, enabling factors and specific initiatives to facilitate progress for businesses, destinations and the sector as a whole. These pathways and instruments are often interdependent, and policies can be targeted at different levels and scales (e.g. national versus business or destination-focused). Innovative governance mechanisms are needed to foster policy coherence and integration, while implementation depends on fit-for-purpose governance arrangements and financial support.

Enablers that are common to all pathways include the need to build capacity and literacy and to create a learning environment that provides evidence (e.g. robust and meaningful tourism data; critical review of interventions and unintended side effects) for future policy decisions. The increasingly uncertain operating environment requires agility in the policy and governance approach. For tourism to resolve the challenges outlined in this chapter, further research and innovation and investment in future technologies and practices is needed.

Based on the analysis discussed in this chapter, key policy considerations to further promote a green recovery and accelerate the transition to a green tourism economy include:

- **Develop long-term strategies that set out a vision for a sustainable future for tourism**, including the desired contribution to economic, environmental, and social wellbeing. This should be supported by action plans with clearly defined responsibilities, interim goals and measurable targets which can drive the green recovery.
- **Leverage government's role in catalysing the green tourism transition**, including through leading by example (e.g. decarbonisation of agencies) and ensuring all public sector funded or procured tourism infrastructure adhere to highest environmental standards and contribute to climate resilient development (e.g. nature-based solutions).
- **Improve co-ordination of tourism policy with relevant policy areas to support the green transition**, and in particular conservation and environmental management, climate action, sustainable transport, and social development (including health and regional economic development). Policy integration is not only important for improved policy coherence and effectiveness, but also to leverage resources across portfolios.
- **Establish tourism governance mechanisms that connect and align action on greening across all levels of government**, and promote transparency and accountability. In complex and uncertain times, it is important to ensure that governance structures are sufficiently flexible, responsive, and resilient at local destination level with national and international level, to deliver the desired outcomes.
- **Implement a mix of evidence-based policies and interventions to promote greener tourism practices**. Prioritise actions targeting high impact areas along the tourism value chain, on the supply and demand side. Apply a combination of direct interventions (e.g. investment), regulations, incentives and awareness raising to accelerate progress towards a greener tourism model.
- **Develop and improve monitoring frameworks to measure progress**, through the provision of robust and meaningful data and indicators. This is important to build understanding among visitors, businesses and destinations the environmental impact of their actions, and to inform the development of effective policies, strategies and programmes.
- **Promote the integration of tourism into the wider economy**, including with primary industries such as agriculture and forestry and at the destination level. Leverage linkages to strengthen the sustainability and resilience of tourism and other key supply and value chains (e.g. food, transport), maximise local benefits and advance principles of the circular economy (closing resource loops).
- **Build capacity and literacy to support action on greening across the tourism system** (consumer to operator to investors). Promote understanding of sustainability and related concepts, such as sustainable procurement, resource efficiency and circular innovation. Empower people to create their own solutions and make sustainable travel choices by promoting consumer information

tools. Support tourism businesses to take action and to measure progress to reduce their GHG emissions and environmental impact, including through skills development and access to finance. Governments can foster learning and exchange and support alternative products or business models, including via mechanisms that transfer or scale up cutting edge innovations.

- **Encourage the development of sustainable tourism experiences that generate positive outcomes for the environment, and visitors.** Innovate in the area of experience design to give visitors the opportunity to contribute positively to the destination through greener travel decisions, including by leveraging digital solutions.

References

- Becken, S. and J. Kaur (2021), “Anchoring “tourism value” within a regenerative tourism paradigm—a government perspective.”, *Journal of Sustainable Tourism* 30(1), pp. 52-68. [24]
- Becken, S. and J. Loehr (2022), “Tourism governance and enabling drivers for intensifying climate action”, *Journal of Sustainable Tourism*, pp. 1-19. [25]
- Becken, S. et al. (2020), “Tourism and climate change: evaluating the extent of policy integration”, *Journal of Sustainable Tourism*, Vol. 28/10, pp. 1603-1624. [26]
- European Bank for Reconstruction and Development and the Global Centre of Excellence (2018), *Advancing TCFD guidance on physical climate risks and opportunities*, <https://www.tcfddhub.org/resource/advancing-tcfd-guidance-on-physical-climate-risks-and-opportunities/>. [27]
- European Commission (2022), *Transition Pathway for Tourism*, <https://ec.europa.eu/docsroom/documents/49498.org>. [10]
- European Commission (2021), *Attitudes of Europeans towards tourism*, <https://europa.eu/eurobarometer/surveys/detail/2283>. [14]
- IPBES (2019), *Global assessment report on biodiversity and ecosystem services of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services*, <https://ipbes.net/global-assessment>. [11]
- IPCC (2022), *Climate change 2022: Impacts, adaptation, and vulnerability*, <https://www.ipcc.ch/report/ar6/wg2/>. [12]
- IPCC (2021), *Summary for Policymakers. In: Climate Change 2021: The Physical Science Basis*, https://www.ipcc.ch/report/ar6/wg1/downloads/report/IPCC_AR6_WGI_SPM_final.pdf. [6]
- ITF (2021), *Decarbonising air transport: Acting now for the future*, <https://www.itf-oecd.org/decarbonising-air-transport>. [8]
- MBIE (2022), *The Tourism Futures Taskforce interim report – We are Aotearoa*, <https://www.mbie.govt.nz/immigration-and-tourism/tourism/tourism-recovery/tourism-futures-taskforce/tourism-futures-taskforce-interim-report/>. [23]

- OECD (2022), *Carbon pricing and COVID-19: Policy changes, challenges and design options in OECD and G20 countries*, <https://www.oecd.org/environment/carbon-pricing-and-covid-19-8f030bcc-en.htm>. [15]
- OECD (2022), *Environment at a glance*, <https://www.oecd.org/environment/environment-at-a-glance/>. [28]
- OECD (2022), *Financing SMEs and Entrepreneurs 2022: An OECD scoreboard*, <https://www.oecd.org/cfe/smes/financing-smes-and-entrepreneurs-23065265.htm>. [16]
- OECD (2022), *Global Plastics Outlook: Economic drivers, environmental impacts and policy options*, https://www.oecd-ilibrary.org/environment/global-plastics-outlook_de747aef-en. [13]
- OECD (2022), *Policy brief on making the most of the social economy's contribution to the circular economy*, https://www.oecd-ilibrary.org/industry-and-services/policy-brief-on-making-the-most-of-the-social-economy-s-contribution-to-the-circular-economy_e9eea313-en. [22]
- OECD (2022), *Why governments should target support amidst high energy prices*, <https://www.oecd.org/ukraine-hub/policy-responses/why-governments-should-target-support-amidst-high-energy-prices-40f44f78/>. [3]
- OECD (2021), *G20 Rome guidelines for the future of tourism*, <https://www.oecd.org/cfe/g20-rome-guidelines-for-the-future-of-tourism-d11080db-en.htm>. [9]
- OECD (2021), *Managing tourism development for sustainable and inclusive recovery*, <https://www.oecd.org/publications/managing-tourism-development-for-sustainable-and-inclusive-recovery-b062f603-en.htm>. [29]
- OECD (2021), *No net zero without SMEs. Exploring the key issues for SMEs and green entrepreneurship*, https://www.oecd-ilibrary.org/energy/no-net-zero-without-smes_bab63915-en. [1]
- OECD (2020), *Linking Indigenous Communities with Regional Development in Australia*, https://www.oecd-ilibrary.org/urban-rural-and-regional-development/linking-indigenous-communities-with-regional-development-in-australia_ab4d8d52-en. [20]
- OECD (2020), *Linking Indigenous Communities with Regional Development in Canada*, https://www.oecd-ilibrary.org/urban-rural-and-regional-development/linking-indigenous-communities-with-regional-development-in-canada_fa0f60c6-en;jsessionid=Zc5O7zT-STKGaXO0IO_jwewyJLegy6mhPOmTNmwF.ip-10-240-5-71. [21]
- OECD (2018), *Elements for a new growth narrative*, [https://www.oecd.org/naec/SG_NAEC\(2018\)1_Elements%20for%20a%20new%20growth%20narrative.pdf](https://www.oecd.org/naec/SG_NAEC(2018)1_Elements%20for%20a%20new%20growth%20narrative.pdf). [4]
- One Planet (2022), *Global tourism plastics initiative*, <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/global-tourism-plastics-initiative>. [19]
- One Planet (2021), *Encouraging sustainable procurement practices through the use of third-party certification schemes*, <https://www.oneplanetnetwork.org/knowledge-centre/resources/encouraging-sustainable-procurement-practices-through-use-third-party?page=2>. [18]

- UNEP and World Bank (2021), *Towards a Circular Tourism Economy: Drivers and strategies for a green transition*, <https://www.oneplanetnetwork.org/knowledge-centre/resources/towards-circular-tourism-economy-drivers-and-strategies-green-transition>. [2]
- UNWTO (2021), *World tourism barometer: Volume 19, no 5*, <https://www.e-unwto.org/toc/wtobarometereng/19/5>. [30]
- UNWTO and ITF (2019), *Transport-related CO2 Emissions of the Tourism Sector*, <https://www.e-unwto.org/doi/book/10.18111/9789284416660>. [7]
- Whelan, T. and C. Fink (2016), “The comprehensive business case for sustainability”, *Harvard Business Review* 21. [17]
- WTTC and UNEP (2021), *A Net Zero Roadmap for Travel & Tourism: Proposing a New Target Framework for the Travel & Tourism Sector*, <https://wedocs.unep.org/20.500.11822/37355>. [5]

Part I OECD country profiles



From:
OECD Tourism Trends and Policies 2022

Access the complete publication at:
<https://doi.org/10.1787/a8dd3019-en>

Please cite this chapter as:

OECD (2022), “Promoting a green tourism recovery”, in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/a820f47d-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area. Extracts from publications may be subject to additional disclaimers, which are set out in the complete version of the publication, available at the link provided.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.