

Re-evaluation report: framework and guidance

This is one of a set of three publications. The other two are *The Charter* and *The journey continues: a guide to re-evaluation*. Together the trio forms guidance on how to remain a member of the European Charter for Sustainable Tourism for a further five years.

The Charter Principles for Sustainable Tourism

The underlying aims of the European Charter for Sustainable Tourism in Protected Areas are to

- **increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage, that should be preserved for, and enjoyed by, current and future generations;**
- **improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.**

The **Charter principles** involve working in partnership, preparing and implementing a strategy, and addressing key issues. Charter protected areas make a series of commitments to achieve the underlying aims:

1 To involve all those implicated by tourism in and around the protected area in its development and management.

A permanent forum, or equivalent arrangement, should be established between the protected-area authority, local municipalities, conservation and community organisations and representatives of the tourism industry. Links with regional and national bodies should be developed and maintained.

2 To prepare and implement a sustainable tourism strategy and action plan for the protected area.

The strategy should be based on careful consultation and be approved and understood by local stakeholders. It should contain:

- a definition of the area to be influenced by the strategy, which may extend outside the protected area;
- an assessment of the area's natural, historic and cultural heritage, tourism infrastructure, and economic and social circumstances; considering issues of capacity, need and potential opportunity;
- an assessment of current visitors and potential future markets;
- a set of strategic objectives for the development and management of tourism, covering:
 - conservation and enhancement of the environment and heritage,

- economic and social development,
 - preservation and improvement of the quality of life of local residents,
 - visitor management and enhancement of the quality of tourism offered;
 - an action plan to meet these objectives;
 - an indication of resources and partners to implement the strategy;
 - proposals for monitoring results.
- 3 To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development by:**
- monitoring impact on flora and fauna and controlling tourism in sensitive locations;
 - encouraging activities, including tourism uses, which support the maintenance of historic heritage, culture and traditions;
 - controlling and reducing activities, including tourism impacts, which: adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise;
 - encouraging visitors and the tourism industry to contribute to conservation.
- 4 To provide all visitors with a high-quality experience in all aspects of their visit, by:**
- researching the expectations and satisfaction of existing and potential visitors;
 - meeting the special needs of disadvantaged visitors;
 - supporting initiatives to check and improve the quality of facilities and services.
- 5 To communicate effectively to visitors about the special qualities of the area, by:**
- ensuring that the promotion of the area is based on authentic images, and is sensitive to needs and capacity at different times and in different locations;
 - providing readily-available and good quality visitor information in and around the area, and assisting tourism enterprises to do so;
 - providing educational facilities and services that interpret the area's environment and heritage to visitors and local people, including groups and schools.
- 6 To encourage specific tourism products which enable discovery and understanding of the area, by:**
- providing and supporting activities, events and packages involving the interpretation of nature and heritage.
- 7 To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism, by:**
- providing or supporting training programmes for staff of the protected area, other organisations and tourism enterprises, based on assessing training needs.
- 8 To ensure that tourism supports and does not reduce the quality of life of local residents, by:**
- involving local communities in the planning of tourism in the area;
 - ensuring good communication between the protected area, local people and visitors;
 - identifying and seeking to reduce any conflicts that may arise.
- 9 To increase benefits from tourism to the local economy, by:**
- promoting the purchase of local products (food, crafts, local services) by visitors and local tourism businesses;
 - encouraging the employment of local people in tourism.
- 10 To monitor and influence visitor flows to reduce negative impacts, by:**
- keeping a record of visitor numbers over time and space, including feedback from local tourism enterprises;

- creating and implementing a visitor management plan;
- promoting use of public transport, cycling and walking as an alternative to private cars;
- controlling the siting and style of any new tourism development.

Signed:

Dated:

The questions are based on the Charter principles, to show how you have implemented the Charter principles over the past five years, highlight successes, any difficulties encountered, and outline the new targets you have set for the coming five years. Please answer every question and supply the evidence requested. We are looking for short summary responses to the questions, which can be easily understood by the external verifier. You are encouraged to make cross-references to other documents as appropriate for evidence or further information.

Please submit your application report in this WORD document and as a signed (page 3 and end of document) printed-out hard copy. Please fill in all questions by typing in the grey boxes (which disappear when typed in) paying special attention to those areas shaded in yellow.

SECTION A – GENERAL INFORMATION

Please provide brief information in this section. You are asked to highlight particularly any changes or developments in the past five years.

A1 Name of the protected area and its responsible body

A2 Contact details

Give named person and position, address, phone, fax, e-mail.

A3 Type of designation

The status of the area, including IUCN category. Indicate any zones of varying designation.

A4 Relationship to surrounding area/region

Indicate any formal or informal surrounding buffer zones or other areas of influence (administrative or in terms of tourism policy).

A5 Size of area/zones

Total size of designated area in hectares. Also give size of other relevant zones within or outside the area.

A6 Population

Give population within the protected area and in any identified surrounding zones.

A7 Legal structure relating to the protected area

Indicate the type/status of protected-area authority, relationship with other relevant local authorities and structure of landownership.

A8 Reason for designation (*very brief description*)

A9 Management and staffing

Total numbers of staff. Please give organisational diagram if relevant.

A10 Overall protected-area management

a) *Does the protected area have a management plan (yes or no)?*

b) *If yes, has this been newly written or revised during the past five years?*

A11 Total annual budget

Please indicate total budget of the protected-area body (including overheads and project expenditure). Explain briefly how the protected area is funded, and indicate any external resources that are regularly available.

A12 Annual visitor numbers

Day visitor:

Staying visitor:

Total nights:

A13 Tourism structure

Give a brief overview of the tourism history and type of tourism in the area.

A14 Infrastructure and tourism offers

Give a brief overview of the tourism history, type of tourism in the area and development of these in the past five years.

SECTION B – MEETING THE CHARTER PRINCIPLES

Principle 1 – Partnership with local tourism stakeholders

Areas in yellow shading indicate particularly important points which are critical for successful evaluation.

1.1 Briefly describe the current structure of the forum (or equivalent arrangement) through which the protected-area authority works with others on the development *and management of tourism*, including current size and membership, frequency of meetings, etc.

How has this forum developed or changed over the past five years (in terms of its work, membership and the partnerships within it?)

1.2 Involvement of **local tourism enterprises**:
Please describe how you have progressed and strengthened relationships with local businesses.

Have any schemes been set up to link businesses more closely with the protected area/Charter implementation? Please describe. *(Such schemes are not obligatory for re-award of the Charter, but we are interested to learn if any exist.)*

Please comment on the involvement of these other key groups over the past five years, including their role in implementation of the action plan:

1.3 Involvement of the local community

1.4 Involvement of local conservation interests

1.5 Involvement of wider (regional) bodies responsible for tourism, conservation and regional development

1.6 Any other key groups, either within or outside the formal partnership structure described above

Principle 2 – Sustainable tourism strategy and action plan

Implementation over the past five years

Please provide general feedback on the implementation of your strategy and action plan to date (questions on specific topics are asked in Section B below), as follows:

2.1 How would you assess your overall progress towards excellence in sustainable tourism, bearing in mind where you started from five years ago?

2.2 Could all of the planned actions be implemented? If not, how much of the action plan was implemented (please estimate as a percentage)?

2.3 What were the main reasons for you not being able to complete the full programme (if applicable)?

2.4 What were your most positive achievements?

2.5 What are the main challenges you still face?

Monitoring results

2.6 Please describe the monitoring you have undertaken of the results of your action plan over the past five years. Indicate where the results of monitoring can be found (in which documents), for review by the verifier on site if necessary.

Recommendations from the verifier and Evaluation Committee

2.7 Please explain how you have addressed the specific recommendations made by the verifier and Evaluation Committee at original evaluation five years ago.

Recommendations for implementation

2.8 How did the budget available to for implementation of the action programme develop over the past five years?

2.9 Were the financial resources available for implementation?

Please state if more, less or about the same as planned.

2.10 Were they sufficient for implementation of the plan?

Please state yes or no and briefly comment

2.11 Have there been changes in staffing levels, both in the protected area generally and in the staff dealing with tourism issues, over the past five years?

2.12 Has the level of staffing affected implementation of the action plan?

Plans for the next five years

2.13 Has your tourism strategy been revised for the next five years?

Please answer yes or no and give a brief explanation.

2.14 Has a new action plan been prepared for the protected area and its partners?

Please answer yes or no and give a brief explanation.

2.15 How are the strategy and new action plan presented?

Please state if as one document, two documents or within another document.

2.16 Briefly describe the process(es) and timetable(s) for both reviewing/revising the strategy and developing the new action plan with your partners, making reference to the forum or partnership structures described under question B1 above and the involvement of local stakeholders.

2.17 State the key objectives for sustainable tourism identified in the (revised) strategy.

2.18 How does the tourism strategy relate to the protected area management plan?

Assessment

*The questions on assessment are asked for the information and interest of the verifier.
New assessment work is not a condition for re-award of the Charter certificate, although we anticipate that some basic assessment in these fields will have been necessary in order to prepare your new action plan.*

For each of the following categories, please state briefly what further assessment has been undertaken during the past five years, and how it has informed your plans for future activities:

2.19 Assessment of natural and cultural resources, their sensitivities (capacity) and opportunities for tourism

2.20 Assessment of the local community and economy

2.21 Assessment of strengths/weaknesses of tourism infrastructure/services

2.22 Assessment of visitor patterns and needs

2.23 Assessment of future visitor markets offering potential

Implementation

2.24 Does the new action plan include an indication of phasing/staging of action over time?

Please answer yes or no.

2.25 Does the action plan indicate the relevant stakeholders or partners for each action?

Please answer yes or no.

2.26 What is the size of the **budget** that the protected-area authority is devoting to the implementation of the new action plan per year, excluding staff costs?

(Questions on budget and staffing: The verifier will be looking for a realistic assessment of what resources will be required to implement the strategy and action plan and where these resources are likely to come from. It is appreciated that a detailed budget or staffing plan for the next five years can probably not be given at this stage, and that some funding or personnel resources may still need to be secured.)

What is this as a percentage of its total budget?

2.27 Have funds been provided (or are they being sought) from other sources?

2.28 Do you judge the level of funding already secured/applied for to be sufficient to meet the action proposed?

Please answer yes or no and comment.

2.29 What is the **staffing** that the protected-area authority is devoting to the implementation of the action programme?

2.30 Is staffing being provided from other sources?

2.31 Do you believe the action proposed can be implemented with this level of staffing?

Please answer yes or no and comment.

Commitment of partners

2.32 Please comment on the commitment of the partners to implementing the new action plan, and

how you will continue to motivate them and ensure their commitment.

- 2.33** Have any formal arrangements been made with partners for implementation of the action programme?

Please answer yes or no and give details.

Monitoring results

- 2.34** Have indicators been identified for monitoring the results of the strategy/new action plan?

Please answer yes or no.

- 2.35** Please set these out and explain how they will be measured.

ADDRESSING KEY ISSUES

Under the following headings, relating to each of the key issues of the Charter (Charter principles 3 to 10), please demonstrate briefly how you have progressed the aims of the Charter over the past five years. Indicate the main actions undertaken, any particular successes, as well as any proposed actions which could not be fulfilled.

Please also show the actions which are proposed in your new action plan relating to each of these headings. We will be looking for evidence of continuing action to make further progress or to maintain existing high standards in these fields.

Principle 3 – Protecting natural and cultural heritage

- 3.1** Monitoring impact on flora and fauna and controlling tourism in sensitive locations

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

- 3.2** Encouraging activities, including tourism uses, which support the maintenance of historic heritage, culture and traditions

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan

- 3.3** Action to control development (including tourism) which would adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise.

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

- 3.4** Action to reduce tourism activities which adversely affect the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise.

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

- 3.5** Encouraging visitors and the tourism industry to contribute to conservation (e.g. “visitor payback” schemes)

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 4 – Meeting visitor needs/quality of experience

- 4.1** Surveys to measure visitor satisfaction

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

4.2 Assessment of future visitor markets and their needs

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

4.3 Specific provision of facilities and information for disabled people

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

4.4 Provision of facilities for economically disadvantaged people

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

4.5 Action to monitor the quality of facilities and services

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

4.6 Action to improve the quality of facilities and services

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 5 – Communication about the area

5.1 Sensitive promotion of the protected area as a destination using authentic images and reflecting capacity/needs of the area, including times and locations

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

5.2 Influence on the promotional activities of others (region, enterprises, etc.)

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

5.3 Provision of clear information material on where to go and what to do when in the area (guides, maps, websites – relevant languages)

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

5.4 Provision of accessible information centres/points for visitors and local people

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

5.5 Processes for ensuring that others (especially tourism enterprises) provide good information for visitors and local people, including groups and schools

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

5.6 Provision of guiding services and an events programme for visitors and local people, including groups and schools

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 6 – Tourism products relating to the protected area

6.1 Provision/development of tourism offers (special events, holiday programmes, etc.) involving the discovery and interpretation of natural and cultural heritage

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

6.2 Effective promotion of these offers

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 7 – Training

7.1 Providing or supporting training programmes for staff of the protected area, in sustainable tourism

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

7.2 Providing or supporting training of other organisations and tourism enterprises in sustainable tourism

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 8 – Maintaining local quality of life

8.1 Involving local communities in the planning of tourism in the area

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

8.2 Communication between the protected area, local people and visitors

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

8.3 Mechanisms for identifying and seeking to reduce any conflicts that may arise

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 9 – Benefits to the local economy

9.1 Promoting the purchase of local products (food, crafts, local services) by visitors and local tourism businesses

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

9.2 Encouraging the employment of local people in tourism

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

9.3 Development of tourism in association with traditional economic activity (e.g. agriculture)

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

Principle 10 – Managing visitor flows

10.1 Keeping a record of visitor numbers over time and space, including feedback from local tourism enterprises

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

10.2 Creating and implementing a visitor management plan

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

10.3 Promoting use of public transport, cycling and walking as an alternative to private cars

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

10.4 Controlling the siting and style of any new tourism development

Key activities and results over the past five years.

Were activities planned in this field which could not be completed? (Please give brief reasons.)

Planned activities in new action plan.

SECTION C – THE WIDER PICTURE

C1 Examples of excellence and best practice

Please give up to five examples of best practice from your protected area for any of the above categories, which best demonstrate how you are working towards excellence in sustainable tourism development.

C2 Marketing and promoting of the Charter

Please demonstrate how your protected area is helping to promote the European Charter for Sustainable Tourism, e.g. in its publications, presence on your website, etc.

C3 Experience of working with the Charter – final comments

C3.1 Please demonstrate how your protected area is helping to promote the European Charter for Sustainable Tourism, e.g. in its publications, presence on your website, etc.

C3.2 Have you had any particular problems (e.g. in implementation, monitoring, budgeting...)

C3.3 Any further comments or suggestions for the future:

Signed:

Dated:

Please send the completed documentation to:

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For further details on the Charter see also www.european-charter.org

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