



## ***Agora Sustainability Check***

### ***Checking sustainability of Tourism projects***

***An approach to determine the economical and ecological quality of projects***

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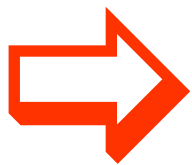
[www.nit-kiel.de](http://www.nit-kiel.de)

[www.agora-tourism.net](http://www.agora-tourism.net)



## Idea of the Sustainability Check

- There are lots of sustainable tourism projects (at least by name)
- and many funds, which depend on this requirement,
- but no unique standard for the sustainability of these projects.



There is a need to develop a **testing tool for the sustainability of tourism projects** which can be used by supporting bodies.





## Development of the Sustainability Check

### Why?

- to **avoid** the granting of projects with negative impacts on society, environment and/or economy,
- to **give a guidance** for the development of (more) sustainable tourism projects,
- to stem the **arbitrary use** off the term 'sustainability',
- to serve as guidance for the **search** after **best practices**.





## Development of the Sustainability Check

### Who?

#### The agora Sustainability Check Advisory Board:

- Baltic Chamber of Commerce Association (BCCA),  
*Michael Zeinert, Björn Ipsen*
- Coalition Clean Baltic (CCB), *Jörg Schmiedel*
- Social Hansa, *Marion Woitschik*
- Friends of the Earth Germany (BUND),  
*Ulrich Söffker*



... in cooperation with the agora Toolbox



# Development of the Sustainability Check

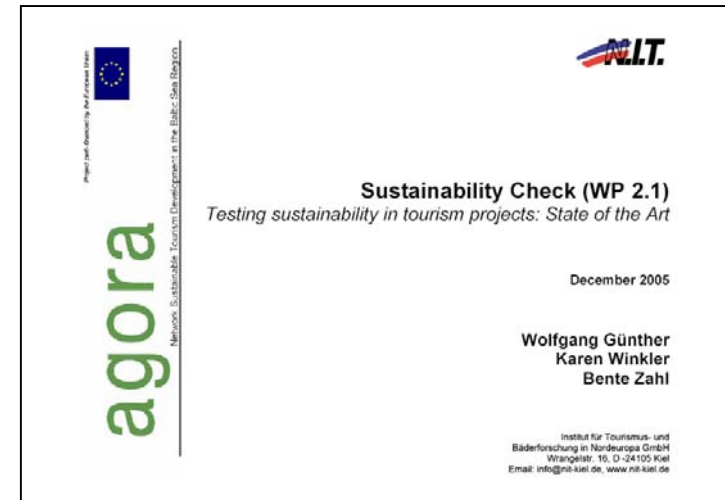
## How?

Step	Procedure	Time period
I	<b>Inventory of existing tools</b>	Oct 2005 - Dec 2005
II	<b>Draft version of testing tool</b> based on inventory and requirements prepared by the advisory board (terms of reference)	Jan 2006 - Apr 2006
III	Small changes and feedback to the agora-network	Apr 2006 - May 2006
IV	<b>Completion of preliminary testing tool</b>	May 2006 - Oct 2006
V	<b>Field tests</b> within the agora pilot projects (work package 3)	Nov 2006 - Jan 2007
VI	<b>Finalisation of the tool</b>	April 2007
VII	<b>Communication</b> (e.g. to policy, supporting bodies, authorities, NGOs)	April 2007 - Dec 2007



## Inventory of existing tools

- 25 different tools are presented and categorised according to their object of investigation (projects, products or destinations).
- Only few tools test the sustainability of (tourism) projects.
- Even if sustainability is one of the objectives of EU funding programmes, there is no EU testing tool for it.





## General Requirements

*In general: The sustainability check should illustrate what needs to be considered in assessing the sustainability of a tourism project:*

- with little **effort**, flexible application
- applicable for the entire Baltic Sea Region
- transparent and easily comprehensible
- **stimulating** and not unnecessarily constricting
- can be **combined** with already existing funding guidelines
- **Internet** availability and usability
- usable for planning and/or implementation and/or final evaluation
- input for **reporting duty**





## Development frame

**Basis:** State of Art Report (December 2005)

**Frame:** 9 Sustainability Objectives

Economy	Society	Environment
Strengthen local/regional economy	Satisfaction of most stakeholders impacted by project	Minimise resource use
Employment of local people	Participation of local people in decisions	Reduce environmental load
Sustainable capacity planning	Respect for local/regional culture	Preserve biodiversity



## Checklist

1-5 Aspects for each objective

**plus** involvement of professional expertise for each dimension

 27 Questions to be answered





# Aspects

Dimension	Economy		
Objective	<b>Strengthen local/regional economy</b>	<b>Employment of local people</b>	<b>Sustainable capacity planning</b>
Aspects	Added value	Employment	Meeting market requirements
	Diversity	Qualification	
	Stability		
	+ Professional economical expertise involved		





# Aspects

Dimension	Society		
Objective	Satisfaction of most stakeholders impacted by the project	Participation of local people in decisions	Respect for local/regional culture
Aspects	Access for the disabled/elderly	Local opinion & transparency	Culture
	Gender equality		Tradition
	Capacity limits		
	Access (to project benefits)		
	Satisfaction (of people affected)		
	+ Professional social expertise involved		





# Aspects

Dimension	Ecology		
Objective	Minimise resource use	Reduce environmental load	Preserve biodiversity
Aspects	Land	Waste	Number of species
	Water	Emissions	Composition of species
	Energy	Water pollution	
	Renewable energy		
	+ Public awareness (of environmental issues)		
	+ Professional ecological expertise involved		





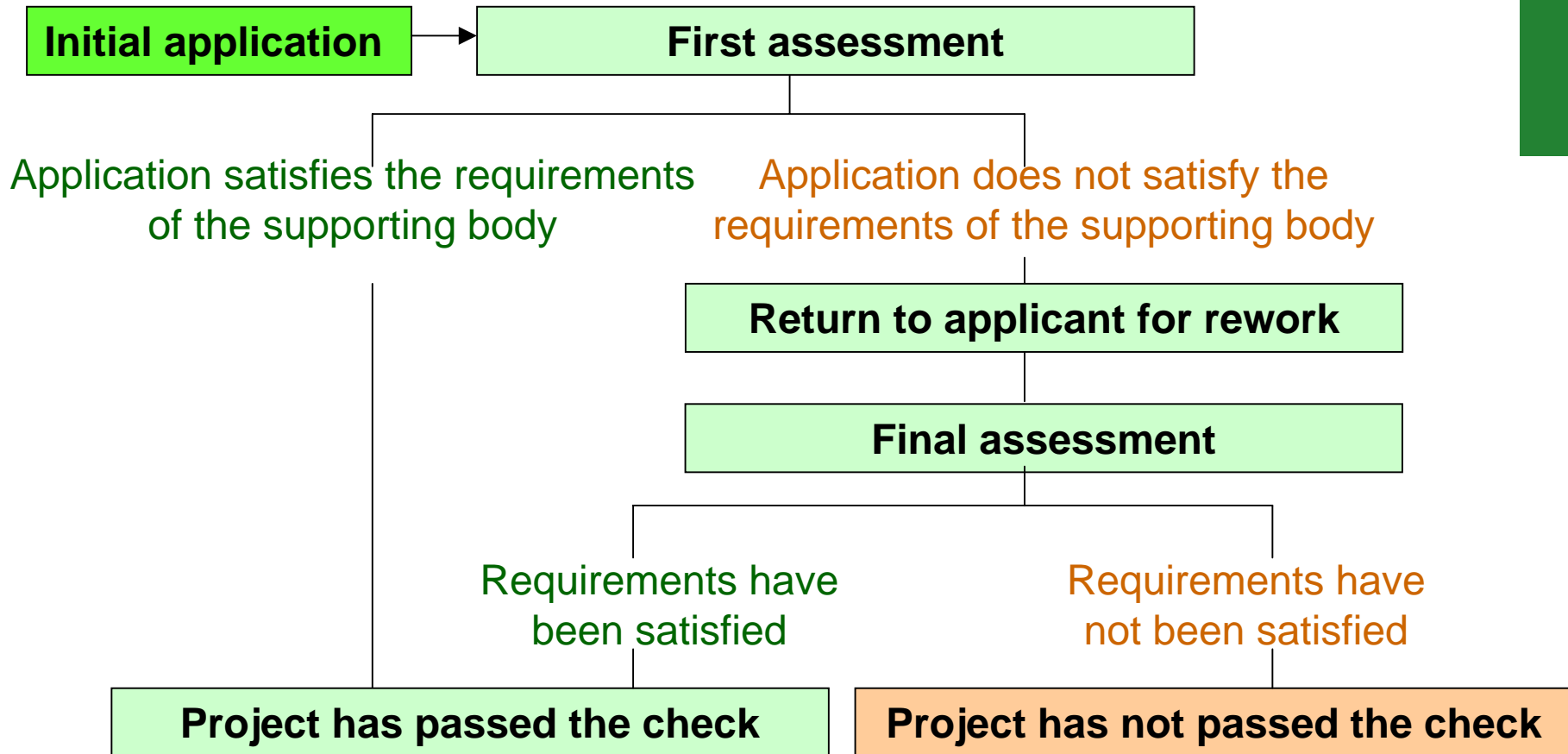
# Checklist

Dimension:	Economy
Sustainability objective:	<b>Strengthen local/regional economy</b>
Aspect: <b>1a</b>	<b>Added value:</b> Does the project create added value for the local/regional economy?
Applicant's rating:	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not relevant for the project
Justification:	
1. Assessment:	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not relevant for the project
Justification:	
Applicant's rework:	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not relevant for the project
Justification:	
Final assessment:	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not relevant for the project
Justification:	
Examples of info/indicators for illustration:	? Preferable consideration of local/regional companies and/or ? Local ownership of the project and/or ? Estimated reinvestment of profits made into local economy and/or ? Estimated revenues generated by the project in the project area and/or ? Innovative aspects of the project and/or ? Amount of additional tourist spending at the destination catalysed by project and/or ? Estimated additional tourist arrivals/overnights caused by project and/or ? Attraction of external capital into the region by the project and/or ? ...





## Recommended procedure





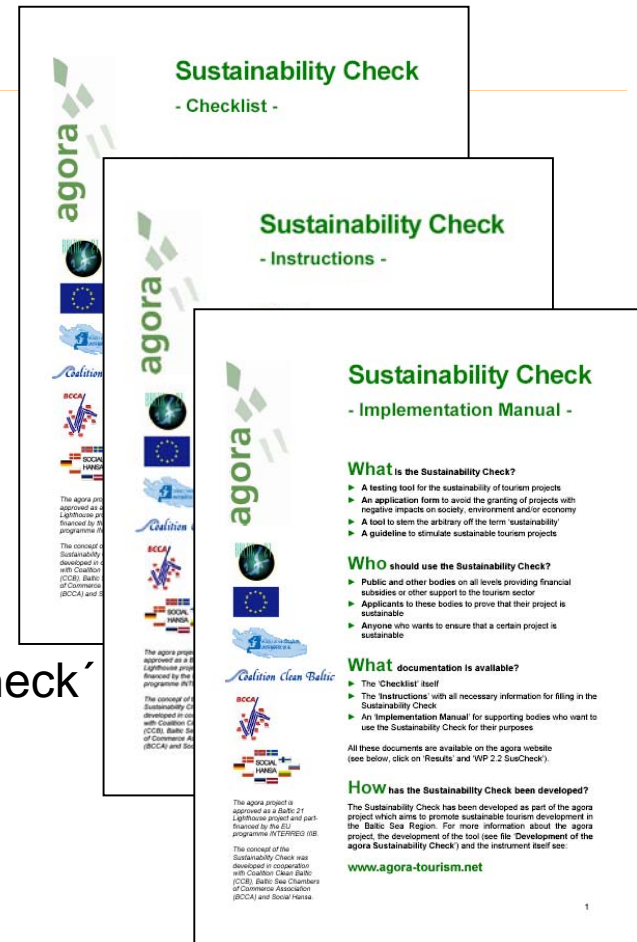
# Sustainability Check Service Kit

- The 'Checklist' itself (word file)
- The 'Instructions' (pdf)
- An 'Implementation Manual' (pdf)

+ Background document:

'Development of the agora Sustainability Check'

For all see [www.agora-tourism.net](http://www.agora-tourism.net)



# Checklist

## Sustainability Check

### - Checklist -

**What is the Sustainability Check?**

- ▶ A testing tool for the sustainability of tourism projects
- ▶ An application form to avoid the granting of projects with negative impacts on society, environment and/or economy
- ▶ A tool to stem the arbitrary use of the term 'sustainability'
- ▶ A guideline to stimulate sustainable tourism projects

**Who should use the Sustainability Check?**

- ▶ Public and other bodies on all levels providing financial subsidies or other support to the tourism sector
- ▶ Applicants to these bodies to prove that their project is sustainable
- ▶ Anyone who wants to ensure that a certain project is sustainable

**What documentation is available?**

- ▶ The 'Checklist' itself
- ▶ The 'Instructions' with all necessary information for filling in the Sustainability Check
- ▶ An 'Implementation Manual' for supporting bodies who want to use the Sustainability Check for their purposes

All these documents are available on the agora website (see below, click on 'Results' and 'WP 2.2 SusCheck').

**How has the Sustainability Check been developed?**

The Sustainability Check has been developed as part of the agora project which aims to promote sustainable tourism development in the Baltic Sea Region. For more information about the agora project, the development of the tool (see file 'Development of the agora Sustainability Check') and the instrument itself see:

[www.agora-tourism.net](http://www.agora-tourism.net)

## Sustainability Check – Checklist

### Cover sheet

A) Please fill in the following details:

Project title:	Name of supporting body:
Name of applicant:	Name of examiner:
Address of applicant:	Address of supporting body:

B) Project stage (please tick only one box):

- Application
- Midterm evaluation
- Final execution check

C) This checklist has been completed for the following assessment stage:

Assessment stage:	Date:	Responsible person:
1. Initial application (by applicant)		
2. First assessment (by examiner)		
3. Resubmission (by applicant)		
4. Final assessment (by examiner)		

D) Rework is required for the following aspects:  
(only to be filled in after the first assessment by the examiner)

Economic dimension:	Social dimension:	Environmental dimension:
<input type="checkbox"/> 1a	<input type="checkbox"/> 5a	<input type="checkbox"/> 9a
<input type="checkbox"/> 1b	<input type="checkbox"/> 5b	<input type="checkbox"/> 9b
<input type="checkbox"/> 1c	<input type="checkbox"/> 5c	<input type="checkbox"/> 9c
<input type="checkbox"/> 2a	<input type="checkbox"/> 5d	<input type="checkbox"/> 10a
<input type="checkbox"/> 2b	<input type="checkbox"/> 6	<input type="checkbox"/> 10b
<input type="checkbox"/> 3	<input type="checkbox"/> 7a	<input type="checkbox"/> 11a
<input type="checkbox"/> 4	<input type="checkbox"/> 7b	<input type="checkbox"/> 11b
	<input type="checkbox"/> 8	<input type="checkbox"/> 12
		<input type="checkbox"/> 13

E) Results:  
(only to be filled by the examiner)

<b>First assessment:</b> <input type="checkbox"/> Project has passed <input type="checkbox"/> Project has not passed	<b>Final assessment:</b> <input type="checkbox"/> Project has passed <input type="checkbox"/> Project has not passed
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## Who should use the check?

### Supporting bodies

This can be ...

... Regional, national or international authorities

(e.g. INTERREG Programme, Baltic21, ministries, municipalities ...)

... Tourist associations

... NGOs

... Foundations





## Checklist use by supporting bodies

It can be ...

... translated and adopted **as it is**.

... **integrated** into existing systems.

... used **as background** information for existing application proceedings.

... taken into account once **new** application proceedings are set up.

... used at **different project stages**

(application, mid-evaluation, final execution check)



## Checklist use at different project stages

- application,
- mid-evaluation, and
- final execution check

## Use of checklist by applicant and examiner

- As guideline in the project preparation process
- As check tool and reporting format in the assessment





## Evaluation methods

### No predetermined evaluation method

Examples: adoption when ...

- ... all answers positive, ('yes' or 'not relevant')
- ... a certain percentage of the answers is positive
- ... all mandatory questions are positive

### Also possible

Two or more ranking classes/levels: lower could mean less support.

 Flexible use according to the supporting bodies needs



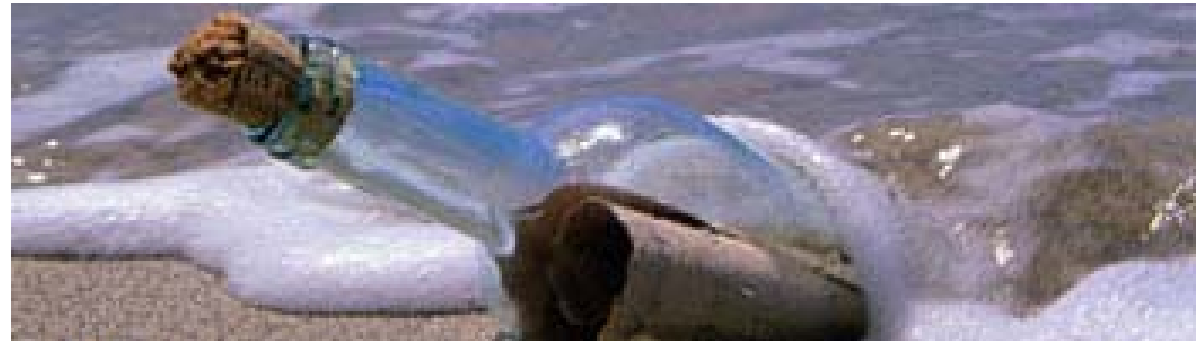
## Advantages of the check

- wide applicability
- adaptable to the special needs of the supporting bodies
- useable without comprehensive time investments
- forces the applicant to think about all three dimensions of sustainability
- gives orientation also for project development



## Outlook

- Translation, dissemination and application
- Make the check a mandatory part of the project assessment of national and international funding programmes ( e.g. INTERREG)



*Thank you!*

