

European Charter for Sustainable Tourism in Protected Areas

How to join the journey:
a guide for protected areas



EUROPARC
FEDERATION



**EUROPEAN CHARTER
FOR SUSTAINABLE TOURISM IN
PROTECTED AREAS**

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***How to join the journey: a guide for protected areas* is one of a set of three publications. The other two are *The Charter* and the *Application report: framework and guidance*. Together the trio forms guidance on how to become a member of the European Charter for Sustainable Tourism.**

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

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Impressum

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The EUROPARC Federation represents around 450 members including protected areas (such as national parks, nature parks, AONBs and biosphere reserves), governmental departments, NGOs and businesses in 36 countries. The Federation is a pan-European, politically independent, non-governmental organisation, whose purpose is to support and promote the full range of protected areas in Europe. The Federation is winner of the World of TUI Environmental Award 2001.

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1 Introduction

This manual is a companion volume to the Charter. Together with the application report, the three documents map a route towards developing sustainable tourism for protected areas.

Because there are many facets to this development, the journey may be challenging, and this guide exists to make sure candidate areas are successful and get the maximum from the five-year, ongoing process.

Process is an important word here. Above all, the Charter exists to help protected areas to develop and manage sustainable tourism. To do this it encourages the use of comprehensive and sustainable structures, objectives and actions. It does not seek to measure the absolute qualities of the areas in terms of landscape and facilities, but rather to facilitate development and growth in partnership.

The Charter was developed through actions taken by a number of pilot areas and the advice of an extensive steering committee. The principles and approach behind the Charter were established in 1999/2000 and a verification process introduced.

The first seven protected areas were awarded the Charter by the EUROPARC Federation in October 2001. By 2010 this had risen to 76 Charter areas, in nine countries: Finland, France, Germany, Italy, the Netherlands, Norway, Portugal, Spain and the United Kingdom.

Besides opportunities to strengthen relationships with tourism stakeholders and influence tourism development at the local level, the benefits for these “chartered” protected areas include:

- a higher profile in the European arena as an area devoted to sustainable tourism;
- public-relations and awareness-raising opportunities with visitors and local and national media;
- an opportunity to work with and learn from other European Charter areas in a network;
- helpful internal and external assessment, leading to new ideas and improvements, and
- greater credibility amongst potential funding partners.

This manual details the rigorous process and tells you how to complete the electronic Charter application report (sent separately), one of the key documents for your application.

If you have any further questions on the European Charter or the registration, application and verification process, please contact the EUROPARC Federation office (address inside front cover).



2 Charter principles

These principles are based on the official Charter text, sister document to this manual. As part of your application you will need to ensure your protected area formally commits to them. A copy for signature is included in your application report.

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



3 Application process

Gaining – and keeping – Charter status is a process of self-questioning, assessment, partnership building and information sharing. It is detailed here, in an easy-to-follow list with actions marked in each section. The application itself takes the form of documentation of the following process.

1 Agree to the Charter principles

Holders of the European Charter must agree to abide by a set of principles for sustainable tourism in protected areas, as set out above. There is a copy of these principles with your Charter application report for printing out and signing. They are based on the full Charter text, and present the undertaking of the authority responsible for the protected area in summarised and simplified form.

Action *Sign and date the principles to signify your acceptance of them, and return with your application.*

2 Fulfill the Charter criteria

The Charter seeks to encourage protected-area authorities to implement a process together with local stakeholders towards sustainable tourism development within and around the protected area. It is recognised that protected areas may start on this process from very different levels – as well-developed tourist destinations, or regions which are just starting to think about tourism and its potential benefits. Nevertheless, there are some basic thresholds which apply to all candidates and are essential for award of the certificate. The verifiers and Evaluation Committee will be looking for the following points, which are essential for the award of the Charter:

- A working, **permanent forum** or similar **partnership structure** for sustainable tourism development in the area; documentation of its work (e.g. minutes, decisions) and evidence that it involves **all relevant stakeholders** including representatives from service and accommodation providers, conservation bodies, users of the area, public bodies and others.
- A working **strategy and action plan for sustainable tourism**, publicly available. The action plan must identify the relevant stakeholders for each action; a budget for implementing the actions and the relevant staffing correlating to the level of action foreseen.

The strategy and action plan must be a self-contained document and should contain all necessary information. Links to other documents, folders or files must only be used as cross-reference to a place where further evidence or information can be found.

- Evidence that the protected area and its partners are **taking action** to address each of the key issues specified in the Charter principles 3 to 10, and to progress or maintain high standards in these fields.

Action *Proceed with your application with these key criteria in mind.*

3 Complete the application report

The application report is a key document, and will be used as the main reference point for assessing your application. It serves as an overview or summary of your activities for both the verifier and Evaluation Committee. Furthermore, it represents an important record of your work which will be referred to again later, for example during re-evaluation after five years.

The application report should be submitted in the application document format, and all questions must be answered. The most essential points, which are critical for successful evaluation, are **marked with yellow shading** in the application report. Although the document may seem long, by asking you these questions now we can be sure that no aspect of the Charter is overlooked in your application. The verifier must be able to concentrate on key aspects which emerge from your answers during his/her visit, rather than having to ask you these detailed questions then.

The application report should be submitted in **English, French, German or Spanish** (see also information on language in section 4 below). As long as the application report is in one of these languages, we can accept the rest of the documents below in other languages, if previously agreed with EUROPARC.

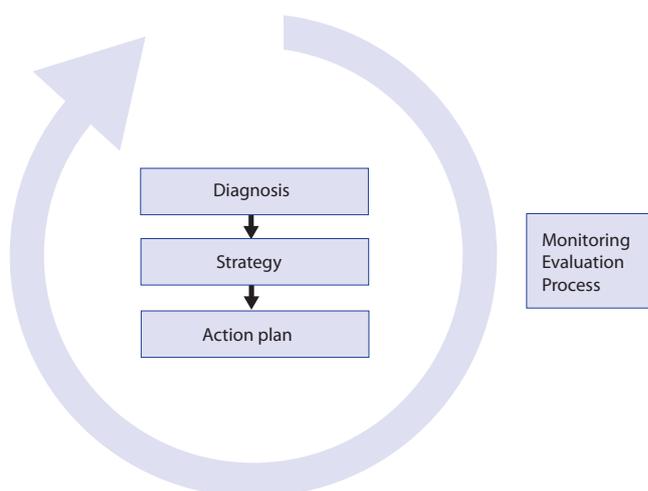
For each question in the application report, you should provide a short summary response. It is important that these responses can be clearly understood on their own. You may also cross-reference to the place where further evidence or information can be found. Yes/No answers should be supplemented in each case with a short elaboration.

Much of the evidence required is likely to be contained in the sustainable tourism strategy and action plan for the protected area. We anticipate that the application report will make cross-references to these documents, stating the relevant page and paragraph numbers. This is particularly the case in the report questions relating to Principles 3 to 10, under “Planned activities”. Similar cross-references may be made to other documents. However, it is important that the report itself provides an overview of how you are fulfilling Charter requirements, and is not just a collection of cross-references.

Action Complete, sign and date the application report. Submit as a hard copy and in electronic format on the form provided.

4 Prepare strategy and action plan for sustainable tourism

The strategy and action plan for sustainable tourism should be prepared in accordance with Charter principle 2. They should be presented as separate, self-contained documents, not included within wider documents such as protected-area management plans. This is important for increasing the sense of ownership of the final strategy and action plan amongst the protected area's partners.



The action plan must be derived from the strategy, but presented separately. The strategy and action plan must take into account the need for re-evaluation in five years and allocate a budget to it. It should be stand-alone, not part of an existing management plan. The action plan must contain a description of each action, identification of those responsible for the action, other partners, budget, and phasing. If there is no action for a specific point this must be explained.

Ideally, the strategy and action plan should be presented in English, French, German or Spanish. If this is not possible, they may also be presented in your country's language, provided that your application report gives good summary responses to each question and clear cross-references to the precise location of details in the strategy and action plan. EUROPARC will try to provide a verifier who speaks your language. However, this may not always be possible. If any other language than the four languages above is to be used please consult EUROPARC in advance.

Action *Submit a copy of your strategy and action plan for the whole of the Charter period over the next five years.*

5 Submit supporting documentation

We ask you to submit a number of additional supporting documents¹:

- A map (1/100 000 scale if possible) showing: the boundary of the protected area; any other relevant strategic zoning; indications of any tourism policies and actions that can be shown spatially/ graphically. Please submit the map both as hard copy and in a electronic version.
- The overall protected-area/area management plan (if available).
- A small selection of key visitor/tourism communication documents relating to the protected area which are of relevance for your protected area's application (maximum of five key documents).
- A list of other available documentation on the protected area which can be viewed on site (background analyses and studies, tourist information and leaflets, other relevant literature, etc.).

Do not send additional background studies, analyses or scientific assessments with your application. Any such work undertaken as preparation for your tourism strategy may be viewed by the verifier on site, if necessary.

Action *Submit the documents above with your application.*



¹ Even if they are not referred to in the application report

6 Dispatch the application

You need to prepare three sets of the application documents as follows (hard copy and electronic version):

- Charter principles, signed and dated.
- Application report, completed and signed.
- Strategy and action plan for the next five years.
- Map (1/100 000 scale if possible) showing: the boundary of the protected area; any other relevant strategic zoning; indications of any tourism policies and actions that can be shown spatially/ graphically.
- Overall protected-area/area management plan (if available).
- Small selection of key visitor/tourism communication documents relating to the protected area which are of relevance for your protected area's application (maximum of five key documents).
- List of other available documentation on the protected area which can be viewed on site (background analyses and studies, tourist information and leaflets, other relevant literature,

One set is for you to retain, one to send to EUROPARC Consulting, and one to be sent to the verifier, once she or he has been appointed. Ensure that all sets of application documents are complete, and that the principles and application reports are signed.

To begin the verification process, please send your completed application (one set of documents) to EUROPARC Consulting (address below). Check the date of the current deadline with info@europarc-consulting.org or info@european-charter.org. Applications arriving after the official date cannot be considered until a later round of verifications.

On receiving your application, EUROPARC Consulting will check it for completeness and appoint an expert in sustainable tourism in protected areas as the verifier for your protected area. You will be notified of his/her address and requested to send the second set of application documents directly to the expert.

Send first set of application documents to:

Wilf Fenten
EUROPARC Consulting GmbH
The Shaws
Selside
Settle
North Yorkshire BD24 0HZ
England

Action Prepare three complete sets of the application documents. Send one to EUROPARC Consulting GmbH; keep one for dispatch directly to the expert verifier appointed for your protected area, and keep one for your own records.

7 Pay application fee

Administering the Charter - including analysing the application, planning and undertaking the verification visit, and making the final evaluation - carries a cost which is paid by the protected area direct to EUROPARC Consulting, which will administer the verification and evaluation process on behalf of the EUROPARC Federation.

Upon receipt of your full application, EUROPARC Consulting will send you a contract for the verification in your protected area. This is to be signed and returned. The first instalment of the verification fee (€2,500 + VAT if applicable) needs to be transferred to EUROPARC Consulting's bank account before the start of the verification visit and not later than 15th March.

The final instalment (€2,500 + VAT if applicable) needs to be paid after the evaluation visit but not later than 15th May. The verifier's travel expenses are to be paid direct to the verifier upon completion of his/her visit. The verifier will submit to the protected area all original receipts for expenses arising from their visit, which are to be reimbursed as soon as possible by the protected area. We recommend that our verifiers stay in accommodation with a protected-area connection.

Action *Make budget for the process and pay application fee.*

8 Plan verification visit

The expert verifier appointed by EUROPARC will check the application, visit your protected area and make an assessment report. The verification visit will usually take around two days.

The verifier will conduct interviews with personnel of the protected area responsible for tourism. Arrangements should also be made for him/her to meet a selection of other stakeholders involved in tourism in the area, including representatives of tourism enterprises.

The verifier will be asked to pay particular attention to the processes you have adopted in your protected area, including liaison and consultation with stakeholders, the analysis undertaken, the balance and consistency of your strategy and action programme, how it relates to the Charter principles, and the resources you are applying to insure that proposed action is achievable.

The dates, timing and programme for the visit will be agreed with you in advance.

The verifier will submit a report to the Evaluation Committee in a standardised format in English. You will receive a copy of this report for your information, to show the strengths and weaknesses which the verifier has identified and possible opportunities for improvement.

The verification visit will usually take place in March or April of the year following the submission of the application dossier.

Action *Plan verification visit.*

9 Get feedback

An evaluation committee of experienced experts in protected areas and sustainable tourism has been appointed by the EUROPARC Federation. It will consider your full application together with the verifier's report. It usually meets in June each year.

The Evaluation Committee's decision will be communicated to you. This will be either:

- a) to award the Charter;
- b) to defer the award subject to specific changes being made, or
- c) to reject the application.

In case of (b) and (c), reasons will be given.

In the case of (b), you will be asked to provide evidence that sufficient steps have been taken to rectify the problems identified, by a time to be agreed with you.

Action *Receive and share decision; plan any identified changes needed.*

10 Become a "chartered" protected area

Protected areas that are awarded the Charter will be identified publicly, and arrangements made with them for an official signing of the Charter certificate. They will be allowed to use the Charter logo and encouraged to promote the principles and obtain as much media coverage of their success as possible.

The Charter is awarded for five years. At the end of this period there needs to be a re evaluation, should you want to retain the award. Two years before a re-evaluation is due we shall inform you that it is time to plan for it. If you are planning to continue, it is then that you should make budgetary provisions for the re-evaluation and check that your action plan is on target to be implemented.

Action *Receive Charter; celebrate status; plan future membership.*

11 Participate in and benefit from the network

In signing the Charter certificate, protected areas commit themselves to implementing their strategy and action plan together with their partners over the coming five years. At the same time, it is expected that they will also participate in the Charter network. Contributions by all Charter areas to networking activities – contributing their own experience, sharing ideas or problems, attending networking meetings, etc. – are essential to make the network lively and useful, and to bring real added-value for all Charter areas.

At the same time, the network is a basic tool for EUROPARC and Charter areas to maintain contact during the five years following the award. The commitment to participate in the network is included on the certificate signed by all new Charter protected areas.



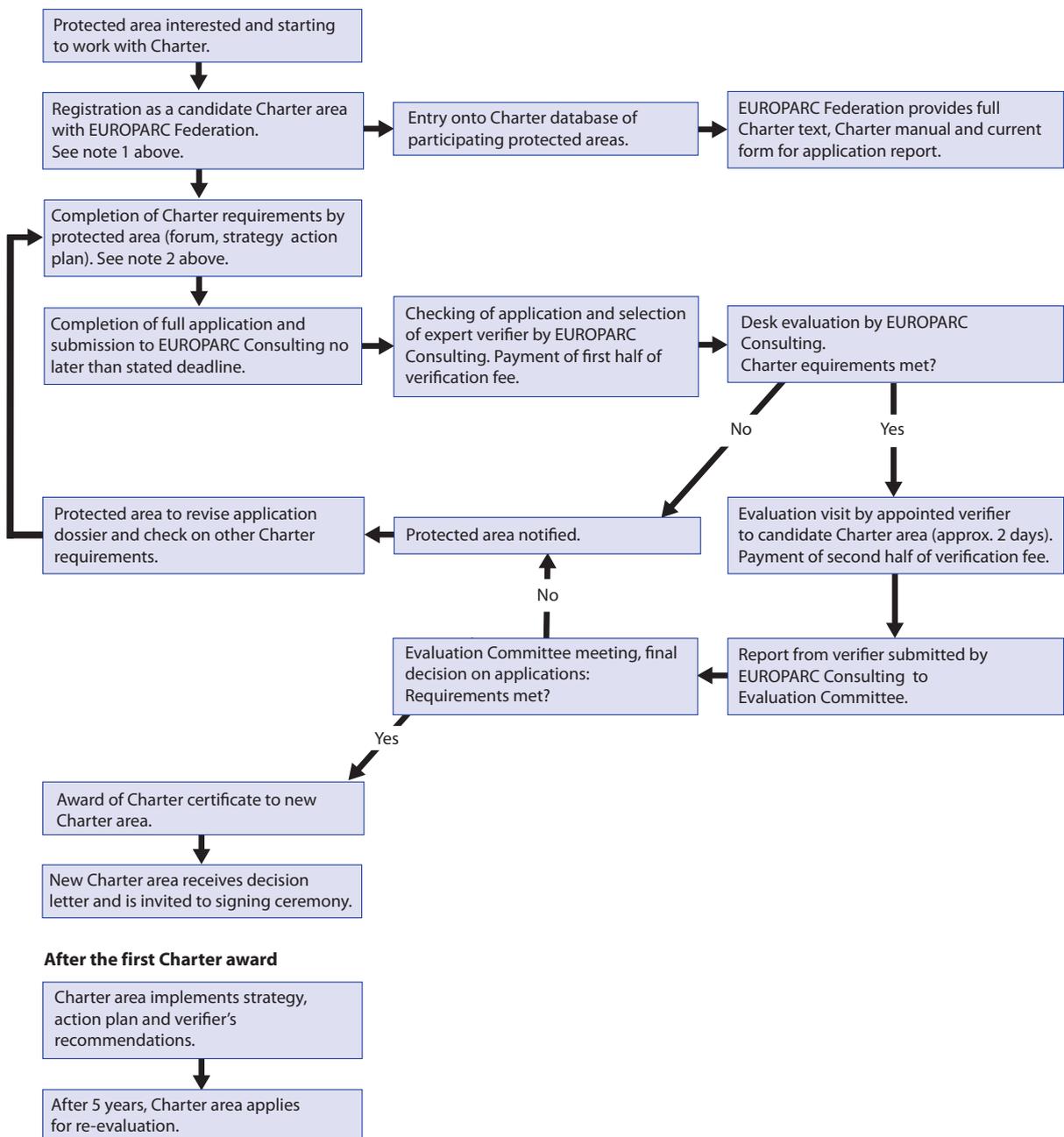
Application and verification process

European Charter for Sustainable Tourism

Important notes

Note 1: A protected area must be a member of the EUROPARC Federation in order to join the Charter. If the protected area is not a EUROPARC member by this stage, it will be required to join the Federation upon registration and before applying for Charter verification.

Note 2: The period between registration as a candidate Charter area and submission of the full application will generally be a year or two (to enable satisfactory completion of all the Charter requirements such as a well-functioning forum). The number of applications which can be accepted and processed in any one year is limited. For this reason it is important that protected-area register with the EUROPARC Federation as soon as they start to work with the Charter, providing an estimate as to when they expect to complete their strategy and action plan.





4 Costs and conditions

The process of running and co-ordinating the Charter carries considerable costs, to which participating protected areas contribute. The costs for participating protected areas are summarised as follows:

Protected area Charter candidate

- Registration fee (for registration as a candidate protected area): **€500**
- Verification fee (for administration of the application and verification process): **€5000 + VAT** (as applicable)⁴

In addition, the protected-area authority is required to cover the costs of **travel, accommodation and board** for the visiting verifier and reimburse him/her direct.

Confirmed Charter areas (following successful verification)

- Mid-term monitoring/evaluation visit (after 2 ½ years) – optional, upon request by the protected area, fees subject to extent of work required.
- Re-evaluation, i.e. evaluation for renewal of Charter membership (after 5 years): **€5000 + VAT**⁴

In addition, the protected-area authority is required to cover the costs of **travel, accommodation and board** for the visiting verifier and reimburse him/her direct.

Networking

A networking fee will only be due when the network is fully activated.

Networking fee (minimum contribution towards on-going co-ordination and facilitation of the Charter areas' network): **€500 per year**

All Charter areas are required to be members of the EUROPARC Federation. Protected areas which are not already EUROPARC members will be requested to join the Federation upon registering as candidate protected areas.

⁴ Process administered by EUROPARC Consulting GmbH, VAT subject to clarification on where this is due in each individual case.

