

## **Assessment of National Tourism Development Strategy - Republic of Moldova -**

The analyze was prepared on the base on Assessment Criteria and Methodology for a National Sustainable Tourism Development Strategy of CEEweb for Biodiversity (Sustainable Tourism Working Group).

*Author of the assessment:*

Ecological Counseling Center Cahul  
Artur Nebunu, Director  
Str. A.Mateevici nr.21, Cahul, Republic of Moldova  
Tel/fax +373 299 21478  
E-mail: [cce\\_cahul@yahoo.com](mailto:cce_cahul@yahoo.com)

Name of the document: ***Sustainable Tourism Development Strategy of the Republic of Moldova in 2003-2015***

### **Introduction to tourism sector in Republic of Moldova**

The tourism industry is extremely fragmented, made up of small and large businesses both from the public and private sectors. The industry needs co-ordination, investment, training and marketing, which entail co-operation between government, local authorities and communities and commercial enterprises.

Elaboration of the strategy is a requirement for the sustainable development. The final objective is that the environmental and cultural assets of the Republic of Moldova should not be depleted by tourism, but preserved and nurtured for the benefit of future generations.

The strategy identifies the deficiencies in the Republic of Moldova's tourism offer and the strategic directions necessary to remedy them and which organizations need to take action in order for the objectives to be met.

Today the tourism contribution to the national economy is relatively insignificant. Low quality accommodation facilities and low revenues from tourism activity, places the Republic of Moldova among the countries with underdeveloped tourism industries. In the last 10 years, the evolution of tourism in the Republic of Moldova demonstrates a tendency of relative decrease in the number of visitors, as a result of the negative impacts of the country's socio-economic environment

The **main goals** of Strategy are:

- To promote Republic of Moldova internationally as a tourist destination.

- To develop tourism in an integrated and balanced manner in order to bring considerable cultural and socio-economic benefits to the country and its communities.
- To integrate tourism development policy within the country's general development policy, including tourism as a catalyst for other sectors of the national economy.
- To ensure that tourism is developed in a sustainable manner so that the heritage to be preserved for future generations.
- To recognize the priority of tourism for the national economy, as a generator of an increasing number of jobs.
- To preserve the country's major heritage and environmental attractions and make them known and accessible to visitors.
- To offer high quality products and services to visitors.
- To give a warm welcome to visitors, providing appropriate information, to assist in their orientation and appreciation of the destination.
- To extend the awareness process among the population of the Republic of Moldova regarding the importance tourist attractions of the country and sharing these with visitors.
- To maintain the Tourism Development Agency as an efficient and effective national tourism organization, for regulating and marketing the tourism products of Moldova.

**Strategy tasks:**

- To develop and implement effective marketing campaigns of the full range of national tourism products in key foreign markets.
- To increase foreign currency earnings from tourism.
- To increase employment in the tourism industry, especially with the aim of increasing the number of women employed – a specific feature of this industry.
- To encourage investment in existing and new tourism enterprises.
- To improve the tourism infrastructure for the benefit of visitors and residents.
- To expand and improve the collection and analysis of tourism statistical data to meet international standards.
- To establish tourism information networks for domestic and foreign visitors.
- To increase the quality and range of training for the travel and hospitality sector.
- To facilitate the access of foreign visitors to the country by reducing bureaucratic barriers and constraints at border crossing points.
- To develop a cooperation and partnership among representatives within each tourism sector and between representatives of different tourism sectors, to encourage development and marketing of tourism product.
- To ensure a partnership between NGOs, public and private sectors regarding tourism development.

**Strategic directions** of development and improvement in tourism sector:

- Transport (aerial, railway, road, marine/fluvial)
- Accommodation structures
- Built Heritage

- Museums
- Culture and Art
- Rural Tourism
- Ecotourism
- Health and Beauty Tourism
- Special Interest Tourism
- Wine Tourism
- Conferences and Exhibitions
- Tourism Enterprises
- Border Controls and Security
- Research and Statistics
- Education and Training
- Tourism Awareness
- Investment Promotion
- Regulatory Framework
- Tourism Information and Reservations
- Marketing

### **Recommendations**

In order to develop the tourism industry in the Republic of Moldova further it is necessary to establish and maintain effective formal and informal partnerships. Those involved in this collaboration will include state ministries and departments, local authorities, professional associations and unions, NGOs, as well as media in the field. The partnership between the Department of Tourism Development and tourism enterprises, both private and public, will be of special importance.

Tourism Agency of Republic of Moldova is responsible for the implementation of the present strategy. In this direction there was elaborated an Action Plan. Deficiencies identified in the tourism industry of the Republic of Moldova have determined the specification of certain detailed actions that need to be implemented in short or medium term. The Action Plan is classified into the following categories of activities:

**Research and statistical resources** - Sustainable Tourism Development in the Republic of Moldova needs to be provided with relevant research and statistical services. Tourism forecasting and planning imply a significant improvement in the system of statistics collection and analysis. For this purpose it is recommended the statistical collection and reports conform to international standards. There is a need to undertake special research to evaluate current and potential tourism markets. These studies will identify development, investment and marketing needs. Republic of Moldova can be successful in tourism by creating new products within the following forms of tourism, which are considered as priority: Rural tourism; Ecotourism; Wine tourism; Beauty and health tourism; Cultural tourism; Business tourism.

**Development of technical-material base and creation of tourist infrastructure** - Very little investment is being made in the existing infrastructure of the Republic of Moldova and this has a negative impact on tourism. There is need capital investment for the improvement of tourist infrastructure. A major sector that needs to be

developed at an early stage is the accommodation sector. Issues related to the interpretation of tourist attractions and orientation of visitors is also highlighted. This is a national problem, therefore the introduction of new interpretation systems at a few tourist attractions is recommended, as examples of the way such work should be undertaken.

In order to create small and medium enterprises in rural areas, pilot projects are recommended in the rural tourism and handicrafts fields.

**Regulation and organization of tourism activities** - For tourism to succeed in the Republic of Moldova, tourism enterprises from the public and private sector should operate with a minimum of administrative requirements. Today tourism activity is largely focused in the capital. A balanced extension and development of tourism activities over the entire territory of the republic is recommended, thus generating new job and socio-economic benefits for local communities. It is recommended a revision of the procedures, taxes and facilities at border crossings to be undertaken without jeopardizing the country's security and customs objectives. This revision must be carried out so that the arrival process is welcoming and trouble free for visitors.

**Regulatory framework** - It is recommended to harmonize both the national tourism legislation with other legal provisions from related industries and to make it conform to international norms.

**Human resource development** - In order to have highly qualified staff the organization of proper education and training is recommended. In this context it is recommended to be established the National Tourism Training Centre that will ensure continuing training and will provide specialist courses.

**Promotion of the national tourist product both on national and foreign market** - As a tourism destination, Republic of Moldova is very little known abroad. Considerable assistance from the state is required to develop and implement a destination marketing program that will establish an attractive image of the Republic of Moldova.

In order to monitor the progress and further development of the Strategy was create a Governmental Committee, which responsibility is to ensuring collaboration between government and executive departments for the strategy implementation. It will also consider and other issues regarding to tourism development at a national level.

As a public document the strategy can be found on the website of Tourism Agency of the Republic of Moldova <http://www.turism.gov.md/index.php?pag=sec&id=39&l=>

Since 2010 there are annual reports published on the Agency site about realization of tasks recommended in the Strategy and Action Plan.

In a view of successful implementation of present Strategy it is recommended that the above mentioned Governmental Committee to elaborate each two years a new/reviewed version of the Strategy. Therefore no information regarding the renewed versions of the Strategy and meetings of the responsible body were recorded/made public till current year. This year the responsible Committee for Strategy implementation stated the fact that for updating the current Strategy it is necessary to modify over 60% of its content. In this

direction was proposed to elaborate a new document - Tourism Development Program for 2012-2015 years.

In some strategic directions of tourism development there were taken important steps for improvement tourism efficiency.

For the strategic direction Rural Tourism was elaborated and approved the National Program “Moldovan Village”, it presents a superior political framework for rural sustainable development in Republic of Moldova for 2005-2015 years. An objective of this program is rural tourism development.

In the area of Education and Training strategic direction was created National Tourism Training Centre which provides training and continuing professional development in the field of tourism. The formation and training of tourism industry personnel is essential in raising the quality of tourist products.

In the area of wine tourism there was elaborated the National Program in tourism “The Wine Road in Moldova”, which aim is to encourage the development of wine tourism and its integration in the international network of wine tourism. The wine industry and the tourism industry contribute to the attraction of a large number of consumers of wine tourist products, additionally popularizing all touristic facilities in Moldova.

The issue of biodiversity, environmental protection is given very little attention in the Strategy.

### The document basic information

Name of the main document representing tourism policy in the country	Years of implementation
Strategy of tourism sustainable development in the Republic of Moldova <i>(Responsible – Tourism Agency of the Republic of Moldova)</i>	2003-2015
Names of the complementary planning documents and initiatives (linked to the other sectors for example such as in point no.9 in the evaluation table)	Years of implementation
<ul style="list-style-type: none"> <li>• Strategic development program of the Tourism Agency <i>(Responsible – Tourism Agency of the Republic of Moldova)</i></li> <li>• Action Plan of the Tourism Agency <i>(Responsible – Tourism Agency of the Republic of Moldova)</i></li> <li>• The National Program in tourism “The Wine Road in Moldova” <i>(Responsible: Ministry of Economy and Trade and Ministry of Local Public Administration)</i></li> <li>• National Program “Moldovan Village” <i>(Responsible: Ministry</i></li> </ul>	<p>2012-2014</p> <p>2012</p> <p>Permanently</p>

<p><i>of Agriculture and Food Industry of the Republic of Moldova)</i></p> <p>1) The program of activity of the Government of the Republic of Moldova. European integration: Freedom, Democracy, Welfare (<i>Responsible: Government of the Republic of Moldova</i>)</p>	<p>2005 – 2015</p> <p>2011-2014</p>
<p><b>The documents' achievements and future projects</b></p>	<p><b>Years of implementation</b></p>
<p>Elaboration of National Program in tourism “The Wine Road in Moldova”                  Creation of National Tourism Training Centre</p>	

**Methodology of assessment** is based on analysis of weighted assessment and review of major tourism sustainability indicators for a tourism strategy, which are divided into several categories in the evaluation table above.

**The evaluation table**

Name of an indicator	Scores (S) and Weights (W)	
<b>I Description of the document and elaboration process</b>	<b>W<sub>I</sub> = 0.1</b>	
1. The documents representing tourism policy in the country	<b>S = 3</b> if yes	
<ul style="list-style-type: none"> <li>- general plan of social-economic development</li> <li>- sectoral plan (national tourism strategy)</li> <li>- operative plan for government actions and agendas</li> <li>- the strategy is published in an easy-to-read version which does not exceed 100 pages comprising major targets</li> </ul>	S <sub>1</sub> S <sub>2</sub> S <sub>3</sub> S <sub>4</sub>	3 3 3 3  <i>Mostly strategic directions to be undertaken by the Strategy are general and not specific.</i>
2. The national strategy sets out clear priorities, goals, policies, objectives, interventions and expected results that contribute to improving biodiversity protection and meeting national and global commitments in the:	<b>S = 1</b> if just the long term vision (up to 10 years) is included <b>S = 2</b> if sustainable tourism is included by enhancing issues where tourism can make a difference <b>S = 3</b> if sustainable tourism and biodiversity protection is included	
<ul style="list-style-type: none"> <li>- vision of national tourism policy</li> <li>- goals of national tourism policy</li> <li>- objectives of national tourism policy</li> <li>- operational measures/tasks</li> <li>- expected results/indicators</li> <li>- expected results (outcomes) of national tourism policy</li> </ul>	S <sub>5</sub> S <sub>6</sub> S <sub>7</sub> S <sub>8</sub> S <sub>9</sub> S <sub>10</sub>	1 1 1 3 2 1  <i>The strategy focuses less on the theme of environment protection and biodiversity conservation.</i>
3. Targets or norms are established by governments (in other strategic documents as well)	<b>S = 1</b> if the relevant planning document exists	

considering areas such as:	<p><b>S = 2</b> if the tourism issues are included in the document  <b>S = 3</b> if the tourism issues and biodiversity protection is included  <b>S = 4</b> if there are targets set which influence tourism sector  <b>S = 5</b> if there are targets set which influence tourism sector and biodiversity protection</p>	
<ul style="list-style-type: none"> <li>- land-use zoning</li> <li>- ecosystem functioning</li> <li>- biodiversity conservation and sustainable use</li> <li>- sustainable transport</li> <li>- green house gas reduction in the tourism industry</li> <li>- climate change adaptation and mitigation in destinations</li> <li>- waste reduction and management</li> <li>- poverty alleviation/mitigation</li> </ul>	<p>S<sub>11</sub> S<sub>12</sub> S<sub>13</sub> S<sub>14</sub> S<sub>15</sub> S<sub>16</sub> S<sub>17</sub> S<sub>18</sub></p>	<p>4 0 0 4 0 0 0 0</p> <p><i>There is a poor connection between the Tourism Strategy and other planning documents of other ministries.                  The tourism sector is little addressed in the objectives, goals of other planning documents at the national level.</i></p>
4. Strategy formulation process includes the following actions:	<p><b>S = 1</b> if the information about the document formulation is available for stakeholders  <b>S = 2</b> if the stakeholders are invited to the meetings or other form of involvement into the formulation process  <b>S = 3</b> if the active contribution was accompanied by research on the type of tourism the stakeholders want to host</p>	
<ul style="list-style-type: none"> <li>- baseline information is gathered on the basis of multi-stakeholder consultations</li> <li>- local communities are involved in the consultations and their active role in destination management is recognized</li> <li>- public and private sector work together during the consultations</li> </ul>	<p>S<sub>19</sub> S<sub>20</sub> S<sub>21</sub></p>	<p>2 1 2</p>

<b>II Situation analysis and programming</b>	<b>W<sub>II</sub> = 0.2</b>	
5. The tourism resources and market analysis for national tourism development	<p><b>S = 1</b> if there are major stakeholders and elements of supply and demand of tourism market included</p> <p><b>S = 2</b> if there are major stakeholders and elements of supply and demand of tourism market included (including separate analysis of country's tourism destination and regions)</p> <p><b>S = 4</b> if there are major stakeholders and elements of supply and demand of tourism market included (comprising separate analysis of country's tourism destination and regions) and natural resources are presented from the point of view of ecosystem services</p>	
<ul style="list-style-type: none"> <li>- domestic (national) market: major stakeholders (tour operators, travel agents, national and regional authorities, NGOs etc.)</li> <li>- tourism supply: products, services, infrastructure and facilities</li> <li>- demand of the domestic market (income, costs, positive and negative trends in demand, working hours)</li> <li>- strategic planning method analysis (e.g. SWOT)</li> <li>- needs for further development and official forecasts</li> </ul>	<p>S<sub>22</sub></p> <p>S<sub>23</sub></p> <p>S<sub>24</sub></p> <p>S<sub>25</sub></p> <p>S<sub>26</sub></p>	<p>2</p> <p>2</p> <p>1</p> <p>1</p> <p>2</p> <p><i>Market analysis for national tourism development is reflected satisfactorily.</i></p>
6. Political factors and international aspects of tourism development	<p><b>S = 1</b> if the description includes the national destination only</p> <p><b>S = 2</b> if the description includes the national and regional destinations</p> <p><b>S = 3</b> if the description includes the national and regional destinations and their <i>competitiveness</i> is described</p>	

<ul style="list-style-type: none"> <li>- product and infrastructure development, general industrial policy starting points</li> <li>- destination marketing</li> <li>- reinforcing the image of the country as a tourist destination</li> <li>- benchmarking (product, strategic)</li> <li>- the strategy gives the answer to which type of tourism is best for the national destination</li> </ul>	<p>S<sub>27</sub> 1                  S<sub>28</sub> 1                  S<sub>29</sub> 1                  S<sub>30</sub> 1                  S<sub>31</sub> 1</p>	<p><i>In the Tourism Strategy there is included the description and strategic directions of activity only for national destinations, local destinations are not addressed.</i></p>
<p><b>III The grade of enhancement on sustainable approach to tourism in policies</b></p>	<p><b>W<sub>III</sub> = 0.1</b></p>	
<p>7. Linkage of tourism to other sectors (the grade of complementation of management documents of the following sectors with tourism development planning)</p>	<p><b>S = 1</b> if there are tourism issues involved in documents  <b>S = 3</b> if there are targets within the documents which define how tourism will help to solve problems of other sector (e.g. agrotourism complements aims of rural development strategy)  <b>S = 5</b> if there are targets within the documents which define how tourism will help to solve problems of other sector involving the quality of live for host and visitor  <b>S = 6</b> if there are targets within the documents which define how tourism will help to solve problems of other sector involving the quality of live for host and visitor and there is a special chapter in tourism strategy describing the connections</p>	
<ul style="list-style-type: none"> <li>- environmental policy</li> <li>- agriculture and forestry</li> <li>- regional and rural development policy</li> <li>- transport strategy</li> <li>- health policy</li> <li>- employment policy</li> </ul>	<p>S<sub>32</sub> 1                  S<sub>33</sub> 5                  S<sub>34</sub> 5                  S<sub>35</sub> 3                  S<sub>36</sub> 5                  S<sub>37</sub> 5</p>	

<p>8. Reference to sustainable tourism agreements, conventions, protocols, EU policy towards development of sustainable tourism and nature conservation:</p>	<p><b>S = 2</b> if there is a reference to at least 1 document  <b>S = 3</b> if there is a reference to 2  <b>S = 4</b> if there is a reference to more than 2</p>	
<p>1) the Global Code of Ethics for Tourism (GCET) as a comprehensive set of principles designed to guide key-players in tourism development (WTO)</p> <p>2) the United Nations Convention on Biological Diversity, especially Decision VII/14 Biological Diversity and Tourism and Decision V/25: Biodiversity and tourism, 2004</p> <p>3) The Charter for Sustainable Tourism (developed in Lanzarote, Canary Islands) Spain, 1995</p> <p>4) EU Sustainable Development Strategy (EU SDS) with indications for national policies on law foundation for sustainable development of tourism, implementation of principles for tourism in other sectors of state activity and enhancement on scientific research on relations between tourism development and environment protection</p> <p>5) the Agenda for a Sustainable and Competitive European Tourism</p> <p>6) European Charter for Sustainable Tourism in Protected Areas</p> <p>7) Agenda 21 as a comprehensive plan of action to be taken by governments in every area in which human impacts on the environment, Rio de Janeiro, 1992</p> <p>8) The Pan-European Biological and Landscape Diversity Strategy (PEBLDS) adopted at the 3rd Ministerial Conference "An Environment for Europe", Sofia, 1995</p> <p>9) EU Strategy for the Danube Region, the Carpathian Convention (Tourism Protocol)</p> <p>10) Other related to sustainable tourism development (fill with the name):          .....          .....</p>	<p>S<sub>38</sub></p>	<p>3</p>
<p>9. Social benefits and community profits</p>	<p><b>S = 3</b> if there are outcomes defining how tourism will contribute to the evaluated issue  <b>S = 4</b> if there are outcomes defining how tourism will contribute</p>	

	to the evaluated issue and recommendations for regional level tourism development strategies are included	
<ul style="list-style-type: none"> <li>- tourism is valued as the contributor to country's economy (preferably in %)</li> <li>- preservation and development of the culture in the region</li> <li>- distribution of income and prospects for employment</li> <li>- support to cultural heritage and local identity</li> <li>- maintenance of community infrastructure</li> <li>- participation of indigenous and local communities (e.g. community based tourism)</li> </ul>	S <sub>39</sub> 3 S <sub>40</sub> 3 S <sub>41</sub> 3 S <sub>42</sub> 3 S <sub>43</sub> 3 S <sub>44</sub> 3	
<b>IV Participation of institutions in tourism management</b>	<b>W<sub>IV</sub> = 0.1</b>	
10. Setting up and enabling a National Tourism Organization as:	<b>S = 3 if yes</b>	
<ul style="list-style-type: none"> <li>- a national body for tourism businesses and destinations</li> <li>- a source of best practice, offering tourism business advice</li> <li>- a custodian of the national product database</li> </ul>	S <sub>45</sub> 3 S <sub>46</sub> 3 S <sub>47</sub> 3	
11. Enhancement on bottom – up approach in destination management	<b>S = 3 if yes</b>	
<ul style="list-style-type: none"> <li>- local tourism bodies are responsible for a tourism destination which reflects the natural geography of an area's visitor economy (rather than local public sector or electoral boundaries)</li> <li>- the tourism policy gives the possibility for tourism bodies to band together into larger groups voluntarily</li> <li>- ensuring financial sustainability of the bodies with minimum reliance on public funds (can act as partners with local authorities or local business partnerships)</li> <li>- reduction of taxes to central level</li> <li>- supporting creation of <i>Destination Management Organization</i> rather than</li> </ul>	S <sub>48</sub> 0 S <sub>49</sub> 3 S <sub>50</sub> 3 S <sub>51</sub> 0 S <sub>52</sub> 0	

Marketing Organizations - partnership between public sector and local authorities and local businesses and attractions - recognition of role of the bodies for Regional Development Strategies	S <sub>53</sub>	3	
	S <sub>54</sub>	3	
12. There are responsibilities determined for the strategy implementation for the following bodies:	<b>S = 5 if yes</b>		
- ministries - the local and regional governments - tourism business associations, clusters, tourism entrepreneurs etc. - the non-governmental sector - protected area authorities, environmental institutions etc.	S <sub>55</sub>	5	<i>In the implementation of the Tourism Strategy, apart from Tourism Agency, there should be established responsibilities for other ministries, regional authorities, NGOs, etc.</i>
	S <sub>56</sub>	5	
	S <sub>57</sub>	0	
	S <sub>58</sub>	0	
	S <sub>59</sub>	0	
<b>V Sustainable development of tourism businesses, supply of services and special enhancement addressing nature protected areas</b>	<b>W<sub>V</sub> = 0.2</b>		
13. Plans to increase the number of environmentally oriented tourism providers and offerings by:	<b>S = 1</b> if recommendations of the following actions are listed <b>S = 2</b> if there are operative actions described for the implementation <b>S = 3</b> if there are operative actions described and indicated bodies responsible for the implementation of these actions		
- support of certification and labelling schemes - strengthening cooperation between (organisation and financing) public and private entities as well as partnerships for sustainable tourism development - educational programs for tourist staff and their professionalization in the	S <sub>60</sub>	1	
	S <sub>61</sub>	1	
	S <sub>62</sub>	3	

framework of tourism environmental impact and social responsibility		
14. Grade of incentive and encouragement to sustainable practices in tourism companies:	<p><b>S = 1</b> if country has sustainable policy for resources management with relevant legislation  <b>S = 2</b> if the legislation provides alternatives for resources' using  <b>S = 3</b> if state government stimulates sustainable practice with finance benefits (tax reducing, tariff reducing)</p>	
<ul style="list-style-type: none"> <li>- energy efficiency</li> <li>- efficient water management solutions</li> <li>- waste management</li> </ul>	<p>S<sub>63</sub> S<sub>64</sub> S<sub>65</sub></p>	<p>1 1 1 <i>The state doesn't have financial mechanisms for incenting the implementation of sustainable practices in tourism.</i></p>
15. Support for financial contribution from the tourism industry to nature protection services:	<p><b>S = 3</b> if there are: a system or instruments with relevant legislation and rules  <b>S = 4</b> if there is evidence (data) that stakeholders use these instruments</p>	
<ul style="list-style-type: none"> <li>- enhancing regional marketing as the foundation for sustainable tourism development, particularly in UNESCO biosphere reserves and national parks</li> <li>- areas close to or in populated regions are protected for nature-based recreation</li> <li>- incorporating the European Union network of Natura 2000 sites in tourism territorial development and marketing</li> </ul>	<p>S<sub>66</sub> S<sub>67</sub> S<sub>68</sub></p>	<p>0 0 0 <i>At national level it doesn't exist support for financial contribution from the tourism industry to nature protection services.</i></p>
<b>VI Tourism strategy measures</b>	<b>W<sub>VI</sub> = 0.1</b>	
16. Indicators and targets comprise important part of the strategy	<b>S = 4</b> if yes	

		If no go to indicator no. 22	
<ul style="list-style-type: none"> <li>- strategy includes targets to be fulfilled</li> <li>- strategy recommends indicators for monitoring</li> <li>- targets are combined with indicators in order to measure impacts</li> </ul>	S <sub>69</sub>	4	
	S <sub>70</sub>	4	
	S <sub>71</sub>	0	
17. Indicators for monitoring are described in 8 groups <sup>1</sup> as headline indicators (not only complementary indicators):	<b>S=0</b> if the indicator is not included in the strategy <b>S= 1</b> if the indicator is included in the strategy  <i>The strategy contains a few monitoring indicators</i>		
<b>(a) political</b>			
- value of micro-loan program for local businesses respecting sustainability criteria and number of SMEs (Small and Medium Enterprises) supported by the programme	S <sub>72</sub>	0	
- measures for evaluating tourist information policy (grade of including sustainability criteria in tourism promotion e.g. communicating access code for tourists, evaluation of tourist behaviour, knowledge and attitudes)	S <sub>73</sub>	1	
- measures to policy for disabled people and equal access to tourism	S <sub>74</sub>	0	
- the map of regional supply chains through the establishment of local or regional cooperation (e.g. territorial communes tourist associations, clusters)	S <sub>75</sub>	0	
- measures of participation and local control (measures of accessibility to information about the strategy, number of people and stakeholders that participated in decision-making process and the quality of their participation)	S <sub>76</sub>	1	
- existence and quality of management plans, visitor regulations and monitoring measures	S <sub>77</sub>	1	
<b>(b) economic</b>			
- value of tourism expenditure in tourism destination by target groups of tourist (annual growth) or change in visitor spending	S <sub>78</sub>	1	
- percentage of GDP coming from tourism	S <sub>79</sub>	0	
- measures taken to reduce the dependency on tourism and seasonality (percentage of income coming from tourism)	S <sub>80</sub>	0	

<sup>1</sup> According to *Conceptual framework for tourism sustainability assessment* by T.G. Ko [in] *Development of a tourism sustainability assessment procedure: a conceptual approach*, Tourism Management 26 (2005) 431-445, Science Direct and Criteria for sustainable tourism, *Tourism for Nature* GEF project's publication.

<ul style="list-style-type: none"> <li>in the time-scale of the year, percentage of fulltime, part time and seasonal jobs in tourism, local unemployment rate off-season, local unemployment rate off-season)</li> <li>- length of average tourist stay (in days)</li> <li>- percentage of people employed in tourism or tourism related jobs</li> <li>- percentage of change in the total number of tourists</li> <li>- growth in % of the surface of the areas which are used for tourism</li> </ul>	<p>S<sub>81</sub></p> <p>S<sub>82</sub></p> <p>S<sub>83</sub></p> <p>S<sub>84</sub></p>	<p>0</p> <p>0</p> <p>1</p> <p>0</p>
<p><b>(c) socio-cultural</b></p> <ul style="list-style-type: none"> <li>- increase/decrease in cultural activities or traditional events and level of participation</li> <li>- level of awareness of local values and cultural heritage</li> <li>- number of local businesses related to the local culture (handicrafts, music, food)</li> <li>- extent of traditional land use</li> <li>- number and quality of infrastructure development stimulated by tourism</li> <li>- percentage of locals using tourism related infrastructure</li> <li>- proportion of tourism revenues reinvested by administration in public responsibilities</li> <li>- tourism's contribution to the preservation of cultural goods</li> <li>- evaluation of the local inhabitants' experiences with and attitudes towards tourism (percentage of locals who are satisfied with tourism development)</li> <li>- evaluation of the tourists' experience</li> </ul>	<p>S<sub>85</sub></p> <p>S<sub>86</sub></p> <p>S<sub>87</sub></p> <p>S<sub>88</sub></p> <p>S<sub>89</sub></p> <p>S<sub>90</sub></p> <p>S<sub>91</sub></p> <p>S<sub>92</sub></p> <p>S<sub>93</sub></p> <p>S<sub>94</sub></p>	<p>0</p> <p>0</p> <p>0</p> <p>1</p> <p>0</p> <p>0</p> <p>0</p> <p>1</p> <p>0</p> <p>0</p>
<p><b>(d) service and product quality</b></p> <ul style="list-style-type: none"> <li>- number of Green Tourism Business Awards</li> <li>- number and type of tourism attractions, tourism products and visitor infrastructure</li> <li>- quality measures of accommodation, food, transport and other services</li> <li>- evaluation of safety</li> <li>- tourists' satisfaction evaluation (percentage of return visitors, visitor expectations versus experience measure, satisfaction rating for those visitors whose experience exceeded their expectations (in 1-5 scale, 1 (much worse than expected) to 5 (much better than expected))</li> <li>- length of the tourism season</li> <li>- existence and quality of visitor/information centers, interpretative materials (e.g. brochures, panels), guided tours, trails, cycling routes, signage (length of trails, number and language of signs)</li> </ul>	<p>S<sub>95</sub></p> <p>S<sub>96</sub></p> <p>S<sub>97</sub></p> <p>S<sub>98</sub></p> <p>S<sub>99</sub></p> <p>S<sub>100</sub></p> <p>S<sub>101</sub></p>	<p>0</p> <p>1</p> <p>1</p> <p>0</p> <p>0</p> <p>0</p> <p>0</p>

- level of training (guards, guides, information, catering, management, etc.)	S <sub>102</sub>	1
<b>(e) general environmental impacts</b>		
- intensity of use (tourist/hectare or km of trails, carrying capacity indicators, level of use of protected areas and natural environment)	S <sub>103</sub>	0
- percentage of tourism businesses with appropriate resource management	S <sub>104</sub>	0
- behavior and attitudes of tourists and locals towards environmental protection	S <sub>105</sub>	1
- type and extension of protected areas, percentage of extended surface of protected areas and creation of new ones	S <sub>106</sub>	1
<b>(f) ecosystem quality</b>		
- revenue from tourism allowed to environment protection activity	S <sub>107</sub>	0
- number and quality of direct engagement of tourism business in projects and programmes for the improvement of environment	S <sub>108</sub>	0
- effectiveness of resource management measured e. g. by amount of waste and water consumed per tourist per day	S <sub>109</sub>	0
- scale of impacts due to tourism infrastructure (e. g. erosion caused by trails, consumption of territory)	S <sub>110</sub>	0
- type and percentage of transport facilities used (tourists arriving by car, train, etc., number of tourists using public transport)	S <sub>111</sub>	0
<b>(g) biodiversity</b>		
- percentage of endangered species	S <sub>112</sub>	0
- habitat status changes measures	S <sub>113</sub>	0
- monitoring of tourist flow is mentioned	S <sub>114</sub>	0
- tools for tourist flow mitigation are previewed	S <sub>115</sub>	0
<b>(h) environmental policy and management</b>		
- amount of financial contribution of tourism to funding of conservation	S <sub>116</sub>	0
- number and type of measures to engage locals in protection activities (meetings, programs, expenditure)	S <sub>117</sub>	0
- percentage of locals actively involved in conservation activities	S <sub>118</sub>	0
- percentage of tourism managers with environmental training	S <sub>119</sub>	0
- percentage of tour operators and hotels with an environmental strategy or policy	S <sub>120</sub>	0
- existence of a land use or development planning process including tourism	S <sub>121</sub>	0
- existence of the environmental impact assessment legal procedure	S <sub>122</sub>	0

<b>VII Financing and Implementation of the National Tourism Strategy</b>	<b>W<sub>VII</sub> = 0.2</b>	
18. Financing	<p><b>S = 1</b> if there are indicated concrete institutions who are responsible for financing</p> <p><b>S = 2</b> if there is indicated concrete amount for each measure implementation</p>	
<ul style="list-style-type: none"> <li>- financing is secured through governmental and voluntary resources for the entire period of the strategy</li> <li>- the strategy implementation is accompanied by a micro-loan program for local businesses respecting sustainability criteria</li> </ul>	S <sub>123</sub>	1
	S <sub>124</sub>	0
19. Monitoring and Evaluation	<p><b>S = 0</b> if no</p> <p><b>S = 3</b> if yes</p>	
<ul style="list-style-type: none"> <li>- M&amp;E is a substantial part of the strategy</li> <li>- the strategy has clearly described ways and means of monitoring, including the responsible body and intervals of monitoring</li> <li>- the periodical monitoring is made public</li> <li>- there are simple qualitative along with quantitative data gathering means employed (household survey of local residents and visitor questionnaire, Delphi technique or in-depth interviews or focus group interviews of environmental expert groups)</li> <li>- tourism research on tourism market (product quality, visitor satisfaction with products and marketing) as well as relation tourism-environment (contribution of tourism to community economies, impact on nature and support for nature protection) in academic and expert institutions will assist and complement the strategy monitoring analysis</li> <li>- there is a specification of data sources for strategies' evaluation (according to what data is available at national level and where the new research is required)</li> </ul>	S <sub>125</sub>	3
	S <sub>126</sub>	3
	S <sub>127</sub>	3
	S <sub>128</sub>	0
	S <sub>129</sub>	0
	S <sub>130</sub>	0

20. Execution	<p><b>S = 1</b> if there are roles and responsibilities for private and public sector (governmental institutions, NGO, etc.)  <b>S = 2</b> if there is given time scale for each strategy measurement  <b>S = 3</b> if there is a financing for implementation</p>	
<ul style="list-style-type: none"> <li>- the strategy identifies clear roles and responsibilities of various stakeholders for the implementation of the strategy</li> <li>- the strategy has an integrated adaption tool, which allows for the review of the strategy after a given period of max. 10 years</li> </ul>	S <sub>131</sub>	1
	S <sub>132</sub>	1
<p><b>Total Score (TS) = W<sub>I</sub> · ∑S<sub>1-21</sub> + W<sub>II</sub> · ∑S<sub>22-31</sub> + W<sub>III</sub> · ∑S<sub>32-44</sub> + W<sub>IV</sub> · ∑S<sub>45-59</sub> + W<sub>V</sub> · ∑S<sub>60-68</sub> + W<sub>VI</sub> · ∑S<sub>69-122</sub> + W<sub>VII</sub> · ∑S<sub>123-132</sub></b></p>		<b>TS = 19,60</b>
<b>Maximum Score (MS) = 45</b>		
<p><b>Percentage in which a strategy fulfills given indicators (P)</b>  <b>P = (TS / MS) x 100%</b></p>		<b>P = 43.55%</b>

### **Recommendations for Strategy improvement:**

Strategy should include strategic directions of development for regional and local tourism.

Strategy should take into consideration the environmental protection system and role of ecotourism in maintaining all kind of protected areas in the country.

Strategy should give more specific actions in strategic directions for tourism development of different areas.

It is necessary to increase monitoring indicators in the Strategy in a view of its successful implementation.

It is necessary to elaborate at national level a mechanism for incenting the implementation of sustainable practices in tourism.

It is necessary to establish concrete responsibilities for other ministries, regional authorities, NGOS, for Strategy implementation.

### ***Attachments:***

1. Sustainable Tourism Development Strategy of the Republic of Moldova in 2003-2015 (Romanian language)
2. Report on implementation of the action plan of the tourism agency in 2011 (Romanian language)