Output 4.3 Overview
Policy Changes Recommendations for Sustainable Tourism Transition in Lebanon

Introduction

While tourism started to gradually recover at the global level after easing the Covid-19 restrictions as of mid-2021, the sector is still facing evolving challenges and risks around the world, especially in terms of 1) the increasing prices of oil and gas, 2) the Ukraine war impacts on the global economy and food supply chains, 3) and climate change and environmental issues. In Lebanon, tourism recovery is slow and uneven due to the economic downfall and financial crisis, the devaluation of the currency, and the political instability. The compound crises in Lebanon have weakened the performance of the tourism and hospitality sector and led to the full or partial closure of many businesses in the conventional tourism market such as large scale hotels and restaurant chains, and to the loss of specialized and qualified labour.

On another hand, rural and nature-based tourism that emerged in Lebanon in 2008, gained more importance in the last three years and became a major market trend for domestic as well as inbound tourism. Tourism in rural and natural areas is mostly characterized by individual and small scale operators working in a non-formal way. Moreover, these emerging types of tourism face many challenges in terms of their integration in the tourism value chain due to the obsolete legal framework of the tourism sector in general and to the absence of specific regulations and legislation. Thus, the socio-cultural and environmental impacts of rural and nature-based tourism are not easily captured and measures which hinders and limits their long-term sustainability.

Evolution of tourism policies and strategies in Lebanon

Destinations' competitiveness and tourism success on the national level depend on the ability of a country to adapt to current and upcoming social, economic, environmental, health, security and technological challenges, and to focus more on the development of tourism governance and incorporate it within general and cross-cutting economic development strategies. Yet, Lebanon is not among the countries that have developed or is currently developing a comprehensive strategy for the tourism sector that puts sustainability as a main pillar for future tourism development plans and actions. The Ministry of Tourism launched a number of scattered initiatives to boost tourism, coordinated promotional campaigns to position Lebanon on the touristic map and maintain its position as a touristic destination, and led specific projects to support touristic activities, notably through supporting international and local festivals. On the other hand, tourism development in Lebanon has always been led by the private sector stakeholders including the main service providers, tourism syndicates and business associations, investors, local and international organizations, as well as social entrepreneurs.

Below are the most important tourism development strategies, initiatives and projects launched in the post-war period in Lebanon:

- ***National Strategy for Tourism (1996)***: a national strategy was set in 1996 with the following actions: 1) rehabilitation and management of the historic sites in Tripoli and the old center in Jounieh; 2) Managing the coastal plain of Damour; 3) Planning for the management of the Qadisha valley; 4) Managing the Qaraoun lake; 5) Elaborating a plan for the mountain areas; 6) Managing the coastal area in Batroun; and 7) Rehabilitating and upgrading public beaches. Only the first priority action was implemented.

- ***Cultural Heritage and Urban Development Project (2003-2016)***: this large scale project funded by the World Bank focused on rehabilitating and improving the basic infrastructure of the major touristic sites and cities of Lebanon, Tripoli, Byblos, Baalbeck, Saida, and Tyre.

- ***Lebanon Mountain Trail Project - LMT (2005-2008)***: funded by USAID, this project delineated and developed the first long distance hiking trail in Lebanon and the Middle East extending over 470 Km. This project became a reference for all nature-based and rural tourism initiatives that followed in Lebanon. The LMT is considered the backbone of rural tourism in Lebanon.

- ***National Rural Tourism Strategy (2015-2019)***: the national rural tourism strategy was funded by USAID in the framework of the Lebanon Industry Value Chain project (LIVCD) in 2014 and endorsed by the MOT in 2015. It is a five years' development strategy aiming at enhancing economic opportunities in rural areas through improving the competitiveness of the rural tourism value chain. The MOT, tourism professionals, and academics consider that rural tourism services and activities, registered an important growth between 2010 and 2020. This trend is observed though the increasing number of rural accommodation offering and the high occupancy rates in rural areas. Moreover, most of the rural and nature-based tourism forms were resilient towards the different crises facing Lebanon, especially with their reliance of the diaspora and domestic markets. Today, rural tourism offers a significant potential for the tourism sector with many opportunities for SMEs, job creation, income diversification, innovation, heritage preservation and valorization, and economic and social cooperation, provided it is accompanied by the reform of the tourism legal framework to make it more adaptable for the new trends of the industry, as well as to guarantee the sustainability of this market and its competiveness.

- ***Lebanon Diaspora Energy regional conferences (2014-2019)***: this initiative was launched by the Ministry of Foreign Affairs in 2014 to organize a series of national and overseas conferences aiming at 1) Celebrating the Lebanese Diaspora success stories throughout their journey in different countries; 2) Promoting the Lebanese heritage by spreading Lebanese

culture and traditions around the world; 3) Establishing connections between the diaspora and the Lebanese residents, thus providing an opportunity for them to share experiences, enhance relations and establish business and social connection; 4) Exploring new possibilities and opportunities, where together, Lebanese residents and expatriates can restore the image of Lebanon and boost the world's trust in its economic potential; 5) Assisting those from Lebanese origin to redeem their citizenship and enjoy the merits and advantages of being Lebanese; 6) Spreading the concept of "Lebanity" among both the Diaspora and their compatriots in Lebanon to preserve and fully live the Lebanese lifestyle.

- ***Visit Lebanon (2017)***: launched in 2017, Visit Lebanon is an overseas marketing and promotion campaign implemented by the private sector under the supervision of the MOT. Since it launching, Visit Lebanon organized only one international forum in Beirut dedicated to promote Lebanon as leisure and MICE tourism destination, with focus on Business to Business marketing. Also a website www.visitlebanon.com was created. The lack of funding and the recent crises facing Lebanon did not allow further events to be organized under this initiative.

- ***Lebanon Economic Vision (2018)***: Lebanon Economic Vision, a detailed prepared by McKinsey for the Government of Lebanon in 2018, placed tourism as one of the most promising sectors and a driver of economic growth. The management consultancy's report - presented in the form of a 1,274 slide-long PowerPoint presentation - dedicated around 120 slides to the tourism sector. The tourism vision initiatives tend to prioritize the mass tourism concept, rather than promoting a sustainable tourism approach based on alternative and experiential tourism forms in alignment with the global trends, which were confirmed after the Covid-19 pandemic. From a marketing perspective, the vision proposed to promote and brand Lebanon as the "up and coming Mediterranean Riviera" with three main types of tourism: leisure (including "City and Entertainment," "Sun & Sea," and "Culture," as well as a "niche offering in ultra-luxury ecotourism"), business (with a focus on the MICE segment and the GCC), and medical tourism. This market and branding vision bears many paradoxes, especially for two types of tourism. The ultra-luxury ecotourism concept does not match with the realities of Lebanon due to the small size of its nature reserves, their proximity to urban settlements, the fragility of natural ecosystems, and the absence of legislation for ecotourism in general. As for the Sun & Sea segment of leisure tourism, it is one of the least competitive markets for Lebanon due to the low attractiveness of the coastline and the high levels of sea water pollution, in addition to the very low capacity to compete with neighboring destinations such as Turkey, Cyprus, and Egypt, resulting in a deteriorated value for money. Moreover, sun and sea tourism is not a trending market segment anymore according to many international studies and reports. The 22 proposed priority tourism initiatives did not promote a balanced socio-economic development model since they favored the center-periphery model, which increases disparities and gaps between urban and rural areas.

The vision mentions three tourism anchor destinations and urban/coastal hubs in Beirut, Byblos, and Sour, instead of developing regional tourism clusters and geographical destinations offering thematic experiences for travelers. In addition to that, the tourism priority initiatives are not presented with a clear time frame that identifies how long is needed for their implementation. In terms of economic impact, the LEV estimated that the number of jobs in the tourism sector will increase from 89,000 in 2017 to 185,000 in 2025. However, there is no explanation of how these 96,000 jobs will be created in the space of six years, how they will be distributed on the different sub-sectors of the tourism industry, and which tourism businesses and services will absorb them.

- ***Lebanon Economic Recovery Plan (2020)***: in light of the sever economic and financial, the Government of Lebanon published an Economic Recovery Plan in 2020 aiming at revitalizing the economy and adopting policy reforms. The tourism sector was mentioned in this study as one of the main sectors that can ensure foreign currency for the country, but did not elaborate more about the needed reforms to unlock tourism potentials, neither it specified which tourism forms should be further developed and promoted.

- ***National Sustainable Mountain Tourism Strategy (2022)***: A comprehensive strategy focusing on mountain areas located at above 500 m altitude. The strategy determined 7 strategic objectives with their action plan and the role of different stakeholders in the strategy implementation.

- ***Enlarge Partial Agreement on Cultural Routes***: in 2022, Lebanon became a member state of the Enlarged Partial Agreement (EPA) on Cultural Routes. Lebanon is part of 3 cultural routes, “Route el El legado andallusi” since 1997, “Phoenecians’ Route” since 2003, and “Routes of the Olive Tree” since 2005. These routes serve as cultural tourism promotion projects with planned itineraries allowing visitors to discover places in a network of shared history and heritage.

Current efforts related to/or affecting tourism policies and legislation

- ***Decentralization and promotional efforts***: in 2022, the minister of tourism announced that the MOT is planning to implement a decentralized approach for its work through reinforcing the existing 15 regional tourism offices and opening another 22 new offices to facilitate administrative procedures and promote tourism at the destination level. Moreover, the MOT is supporting the creation of Destination Management Organizations (DMOs) in different areas around Lebanon such as in Jezzine, Shouf, Kesrouane and Deir El Ahmar.

However, it is still unclear how tourism decentralization and the support to create DMOs will evolve while the legal framework has not been modernized, in addition to the inability of the ministry to recruit new employees for the regional tourism offices. On another hand, the MOT launched two seasonal campaigns in partnership with the private sector represented by main tourism syndicates to promote Lebanon in 2022, the "Bijnounak Bhebbak" campaign during winter 2022 and the "Ahla Bhal Talleh" campaign during summer 2022. Nonetheless, the MOT initiatives are still limited to promotional campaigns and did not tackle the sector development from a strategic level, except for the National Sustainable Mountain Tourism Strategy that was prepared under the framework of a UNDP funded project in 2021 and endorsed by the ministry in February 2022, but without having a direct role in its implementation and/or monitoring. It worth mentioning that the Mountain Tourism Strategy contains a detailed annex about the DMOs creation and governance guidelines for Lebanon.

- **Standardization of hiking trails'** design, establishment, management and maintenance, this initiative is led by the Lebanon Mountain Trail Association in coordination with the Lebanese Organization for Norms and Standards (LIBNOR).

- **Updating the legal framework of guesthouses**. After their emergence twenty years ago in Lebanon, and their first formal organization based a ministerial decree issued by the Ministry of Tourism in 2011, guesthouses became in the last five years the major accommodation trend in Lebanon in terms of supply and demand. The number of accommodation facilities labelled by their owners and by the market as guesthouses increased form around 10 in 2004 to more than 200 in 2022.
  With this increase and the diversity in their types, services and amenities, there is a growing need to update the legal framework of guesthouses in order to classify them in sub-categories according to clear criteria. The ongoing initiative to review and update guesthouses classification in Lebanon is led since 2022 by the private sector in coordination with the ministry of tourism. It is estimated that by the end of 2023 a new legal framework will be proposed for guesthouses. Moreover, the ministry of tourism is supporting a group of leader guesthouses in Lebanon to create the first syndicate for this type of tourism accommodation. Similar efforts and discussions by multiple national and local stakeholders are discussing the need include additional types of accommodation in the new legislation reforms such as camping sites, nature-based resorts and eco-lodges.

- **Reviewing the tour guiding profession legal framework and categories**. The formal tour guiding profession in Lebanon is so far limited to the official cultural tour guides licensed by the Ministry of Tourism based on their academic qualifications (pre requisite is a bachelor degree in tourism, history, geography, archaeology, or media and communications) that should be followed by a short-term course of 3 months provided by the ministry of tourism in order to issue licenses for the qualified guides. Hence, in the last 15 years, with the growing demand for nature-based tourism, adventure tourism and village-based tourism, a new type of non-formal guides emerged in Lebanon without having a legal framework and recognition. Today there are around 60 licensed cultural tour guides in Lebanon and more than 100 non

formal guides working in nature-based and adventure tourism activities. Therefore, concerned stakeholders including the ministry of tourism, the syndicate of tour guides, the Union of Sustainable Ecotourism Institutions in Lebanon, Nature Reserves, and the LMTA are all discussing the need to review the legal framework for this profession to add new categories for guides and formalize them in order to guarantee high quality services, sustainability and ensure safety.

- **Organizing and formalizing the tours operators working in the provision of nature-based and adventure tourism services and activities.** Similar to the issue faced in the guiding profession, the formal tour operating businesses in Lebanon are limited to the official travel agents licensed by the Ministry of Tourism based on existing laws. Hence, in the last 10 years, with the growing demand for nature-based tourism, adventure tourism and village-based tourism, the number of tour organizers offering such types of tourism boomed and increased rom around 30 in 2010 to more than 150 in 2022. Among these 120 tour organizers, there are around 20 legal operators working as companies or NGOs, the remaining are individual non-formal initiates. Therefore, concerned stakeholders including the ministry of tourism and the Union of Sustainable Ecotourism Institutions in Lebanon are discussing the need to review the legal framework for such service providers in order to formalize their work under an up-to-date legal framework in order to guarantee high quality services, sustainability and ensure safety.

Policy changes recommendations for sustainable tourism transition

The transition to a more sustainable tourism sector in Lebanon is hindered by several chllaneges and barriers, including:

- The obsolete legal framework of the tourism sector that dates back to the mid-1960s;
- The lack of up-to-date legislation and regulations that takes into consideration the news trends of the tourism sector;
- The unfavorable enabling environment, especially for social entrepreneurship and innovation;
- The lack of coordination between major stakeholders;
- The weak integration at the value chain level and stakeholders' fragmentation;
- Absence of categorization, quality control, and certification for emerging tourism service providers and new tourism trends;
- Lack of data, market information and absence of tourism satellite accounts

- Lack of new investments due to the compound crisis and the political and economic instability.

To overcome these challenges and barriers, stakeholders involved in tourism planning and management should cooperate together to implement specific actions such as:

- The obsolete legal framework of the tourism sector that dates back to the mid-1960s;
- Understand the new tourism trends and update/adapt the legal frameworks to answer the sector needs;
- Improve the enabling environment, especially for social entrepreneurship and innovation;
- Raise awareness among tourism service providers and destinations on sustainable tourism issues and support them to adopt sustainably practices and monitor tourism impacts;
- Promote investments related to sustainability especially in terms of energy, water, transportation, waste management and natural resources.
- Valorization and protection of the natural and cultural heritage and development of thematic tourism itineraries and routes;
- Assist tourism business associations and selected tourism firms in building/improving their resilience towards crises and shocks;
- Build regional clusters regrouping key tourism service providers and create territorial brands;
- Categorize, standardize and certify rural and alternative tourism services and activities.

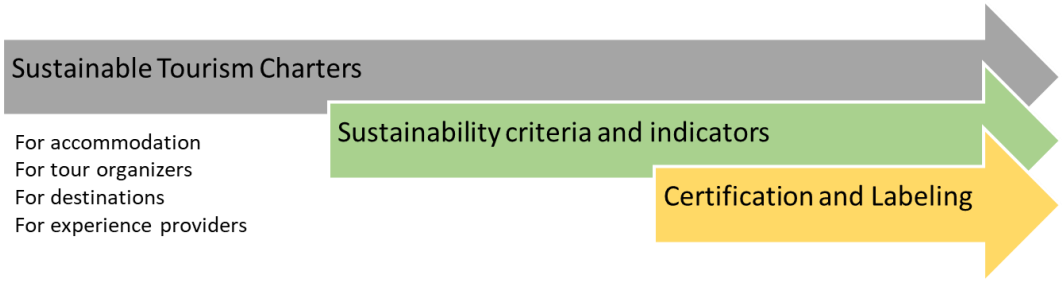
From a practical perspective the roadmap to follow to ensure the transition towards sustainable tourism can be done through three phases:

Phase 1: **Establishing Sustainable Tourism Charters** covering accommodation facilities, tour organizers, destinations, and experience providers. The charter elaboration should follow a grass root and participatory approach to ensure its voluntary adoption by the largest number of tourism operators.

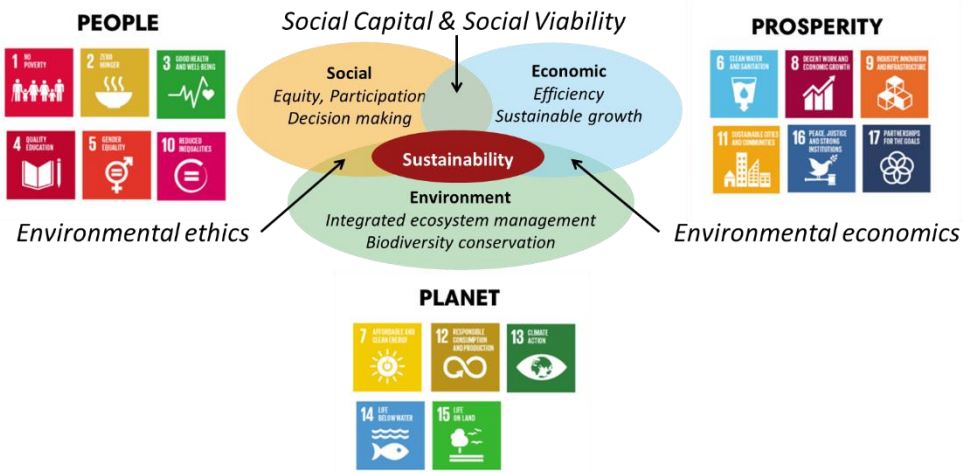
Phase 2: based on the Sustainable Tourism Charters, determine national, regional and local **Tourism Sustainability Criteria and Indicators** with clear data collection tools and

measurement/analysis models in order to assess the performance of accommodation facilities, tour organizers, destinations, and experience providers.

Phase 3: based on the Sustainable Tourism Charters and the Tourism Sustainability Criteria and Indicators, create **Certification and Labelling Programmes** to guarantee the social, economic and environmental sustainability at the level of accommodation facilities, tour organizers, destinations, and experience providers.



The above mentioned charters, criteria and indicators, as well as the certification and labelling programmes should consider the three pillars of sustainability and the SDGs as their main guiding framework.



Moreover, the following global and regional sustainable tourism framework, policies, certification and labeling schemes can be used by the Lebanese tourism sector stakeholders in the process of transitioning to a more sustainable industry. They can be used to as reference and baseline to design a tailor made national sustainable tourism charter, sectoral charters, sustainability criteria and indicators, and most importantly certification and labeling schemes that should be coherent and harmonized with international standards.

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